

# CRM CUSTOMERS

## QUOTES

Client-specific quotes can be accessed from the Customer Homepage as set out below.

A [full list of Quotes](#) (linked to you as a Salesman) can be accessed from the Homepage.

In CRM you have the ability to

- **View**
- **Edit**
- **Print**
- **Accept** and
- **Reject**

Quotes for your Customers.

Once '**Accepted**' a Quote can no longer be edited.

Quotes can be added when

- creating a new Case or
- editing a Case
- adding or editing an Activity
- or from the Case and Activity lists.

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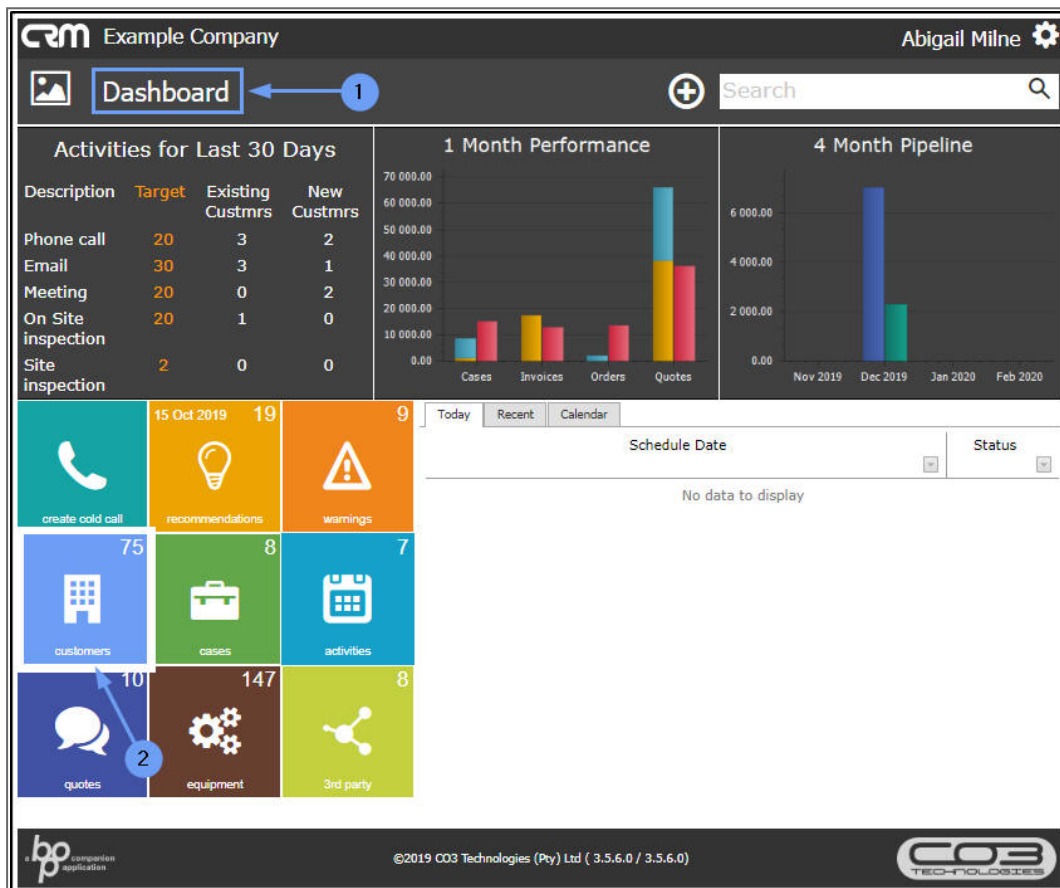
**Ribbon Access:** Webpage > `http://[servername]:[port-no]/BPOCRM/User.aspx`

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## ACCESS CUSTOMER-SPECIFIC QUOTES FROM THE CUSTOMER HOMEPAGE

To access your customer-specific quotes, you will first need to navigate to the Customer Homepage.

1. In the **Homepage**,
2. Click on the **Customers** tile.



The screenshot shows the CRM Example Company dashboard. At the top, there's a header with the company name, user name 'Abigail Milne', and a settings gear icon. Below the header, there's a 'Dashboard' tab highlighted with a blue circle and a number 1. To the right of the tab is a search bar. The main content area is divided into several sections:

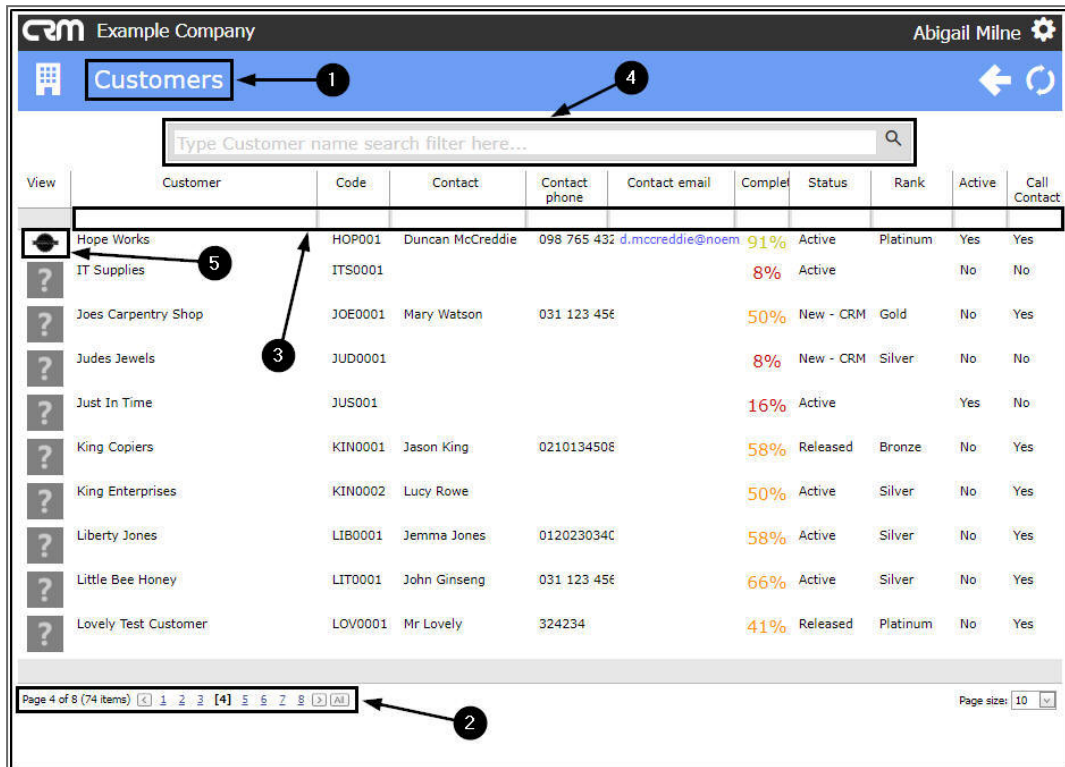
- Activities for Last 30 Days:** A table with columns: Description, Target, Existing Custmrs, and New Custmrs.
 

Description	Target	Existing Custmrs	New Custmrs
Phone call	20	3	2
Email	30	3	1
Meeting	20	0	2
On Site inspection	20	1	0
Site inspection	2	0	0
- 1 Month Performance:** A bar chart showing performance for Cases, Invoices, Orders, and Quotes. The y-axis ranges from 0.00 to 70,000.00.
- 4 Month Pipeline:** A bar chart showing the pipeline for Nov 2019, Dec 2019, Jan 2020, and Feb 2020. The y-axis ranges from 0.00 to 6,000.00.
- Activity Tiles:** A grid of tiles for various activities: create cold call, recommendations, warnings, customers (highlighted with a blue circle and a number 2), cases, activities, quotes, equipment, and 3rd party.
- Bottom Section:** A section with tabs for Today, Recent, and Calendar. It includes a 'Schedule Date' field and a 'Status' dropdown. Below this, it says 'No data to display'.

The footer contains the CO3 Technologies logo, copyright information '©2019 CO3 Technologies (Pty) Ltd ( 3.5.6.0 / 3.5.6.0)', and a 'CO3 TECHNOLOGIES' logo.

1. The **Customers** listing page will open.
2. You can use the **Page Reference field**,
3. the **Filter Row** or

4. the **Filter Text Box** to *search* for your customer.
5. Click on the selected *Customer icon* in the **View** column.



The screenshot shows the 'Customers' page in a CRM system. The page header includes the 'CRM Example Company' logo and the user 'Abigail Milne'. The main content area is a table with columns: View, Customer, Code, Contact, Contact phone, Contact email, Comple, Status, Rank, Active, and Call Contact. The table lists 10 customers, including 'Hope Works', 'IT Supplies', 'Joes Carpentry Shop', 'Judes Jewels', 'Just In Time', 'King Copiers', 'King Enterprises', 'Liberty Jones', 'Little Bee Honey', and 'Lovely Test Customer'. The 'View' column contains icons for each customer. A search filter box is located above the table. The page footer shows 'Page 4 of 8 (74 items)' and a 'Page size' dropdown set to 10.

View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
	Hope Works	HOP001	Duncan McCreddie	098 765 432	d.mccreddie@noem	91%	Active	Platinum	Yes	Yes
	IT Supplies	ITS0001				8%	Active		No	No
	Joes Carpentry Shop	JOE0001	Mary Watson	031 123 456		50%	New - CRM	Gold	No	Yes
	Judes Jewels	JUD0001				8%	New - CRM	Silver	No	No
	Just In Time	JUS001				16%	Active		Yes	No
	King Copiers	KIN0001	Jason King	0210134506		58%	Released	Bronze	No	Yes
	King Enterprises	KIN0002	Lucy Rowe			50%	Active	Silver	No	Yes
	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	Active	Silver	No	Yes
	Little Bee Honey	LIT0001	John Ginseng	031 123 456		66%	Active	Silver	No	Yes
	Lovely Test Customer	LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes

1. The *Customer Homepage* will open.
2. Click on the *Quotes* tile.



**CRM Example Company** Abigail Milne

**Hope Works** 1

**Activities for Last 30 Days**

Description	Target	Existing Custmrs	New Custmrs
Phone call	20	3	2
Email	30	3	1
Meeting	20	0	2
On Site	20	1	0
Inspection	2	0	0
Site inspection			

**1 Month Performance**

**4 Month Pipeline**

**Hope Works - HOP001**

Trading Name Hope Works  
Registered Name Hope Works (Pty) Lts  
Description  
VAT No 987654321  
Registration 123456789  
Rank Platinum  
Website <http://www.hopeworks.co.za>  
Phone 031 123 4567

91%

**12 Months Sales History**

Contract Income Sales Revenue

1. The **Quotes for [selected customer]** page will open.
  - All of the quotes linked to this customer will be displayed (even ones where you are not the Salesman).
2. You can use the **Page Reference field** or the
3. **Filter Row** to search for a particular Quote.

## VIEW / DOWNLOAD / PRINT CUSTOMER QUOTE

4. In the Quote Reference column, click on the blue **number** of the Quote that you wish to **View, Print, Download** or **Email**.

CRM

Example Company

Abigail Milne

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Quotes for Hope Works

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Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000202	HOP001	Hope Works	toner	600.36	ZAR	17 Nov 2017	Order generated	Yes
QT0000203	HOP001	Hope Works	test	14073.30	ZAR	18 Dec 2017	Order generated	Yes
QT0000204	HOP001	Hope Works	1234	20932.74	ZAR	29 Jan 2018	Order generated	Yes
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	New quote	Yes
QT0000210	HOP001	Hope Works	HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000214	HOP001	Hope Works	HW/Q199	7436.62	ZAR	24 Oct 2019	New quote	Yes
QT0000217	HOP001	Hope Works	HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

Page 10 of 10 (99 items)

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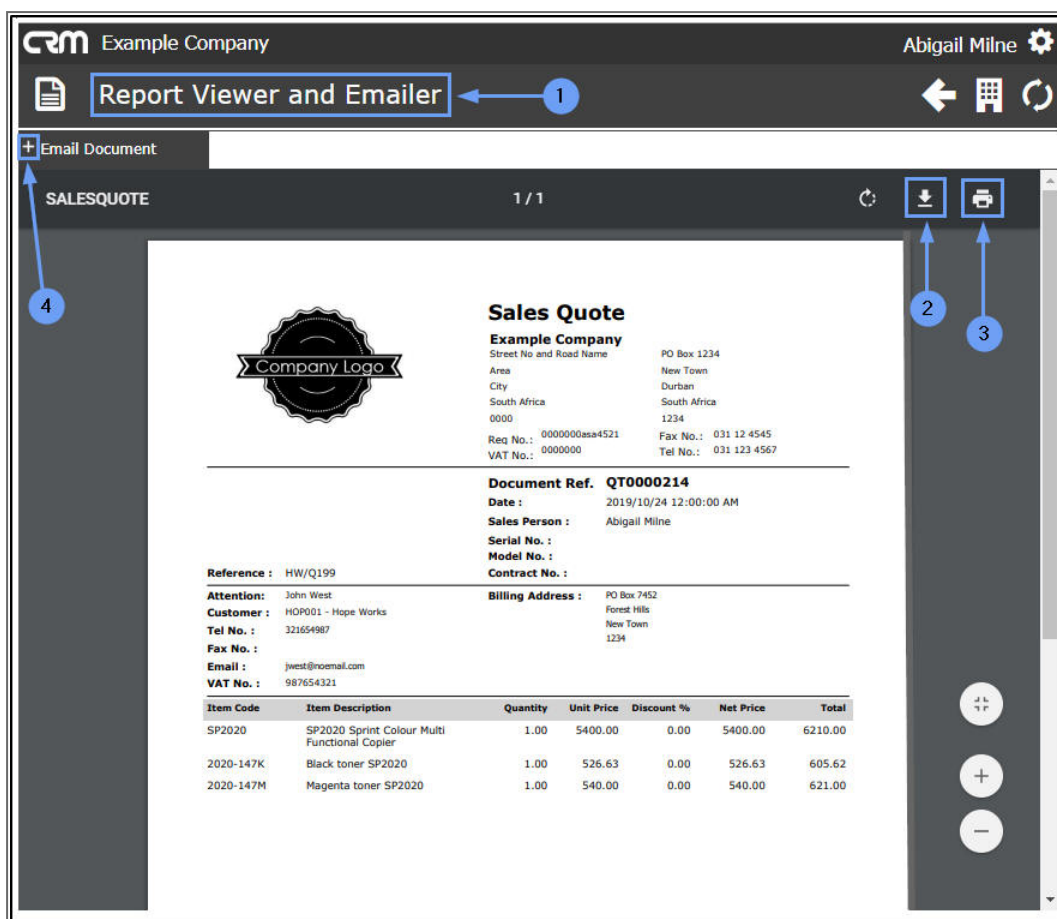
All

Page size: 10

- The **Report Viewer and Emailer** page will open.
  - The selected Quote will be displayed.
- Here you can **download** the Quote and/or
- Print** the Quote.

## EMAIL QUOTE

- Click on the [ + ] sign on the **Email Document** tab.



CRM Example Company Abigail Milne

Report Viewer and Emailer

+ Email Document

SALESQUOTE 1 / 1

**Sales Quote**  
**Example Company**  
 Street No and Road Name PO Box 1234  
 Area New Town  
 City Durban  
 South Africa South Africa  
 0000 1234  
 Req No.: 0000000asa4521 Fax No.: 031 12 4545  
 VAT No.: 00000000 Tel No.: 031 123 4567

**Document Ref. QT0000214**  
 Date : 2019/10/24 12:00:00 AM  
 Sales Person : Abigail Milne  
 Serial No. :  
 Model No. :  
 Contract No. :

Reference : HW/Q199  
 Attention: John West  
 Customer : HOP001 - Hope Works  
 Tel No. : 321654987  
 Fax No. :  
 Email : jwest@noemail.com  
 VAT No. : 987654321

**Billing Address :** PO Box 7452  
 Forest Hills  
 New Town  
 1234

Item Code	Item Description	Quantity	Unit Price	Discount %	Net Price	Total
SP2020	SP2020 Sprint Colour Multi Functional Copier	1.00	5400.00	0.00	5400.00	6210.00
2020-147K	Black toner SP2020	1.00	526.63	0.00	526.63	605.62
2020-147M	Magenta toner SP2020	1.00	540.00	0.00	540.00	621.00

1. The **Email Document** frame will be expanded.

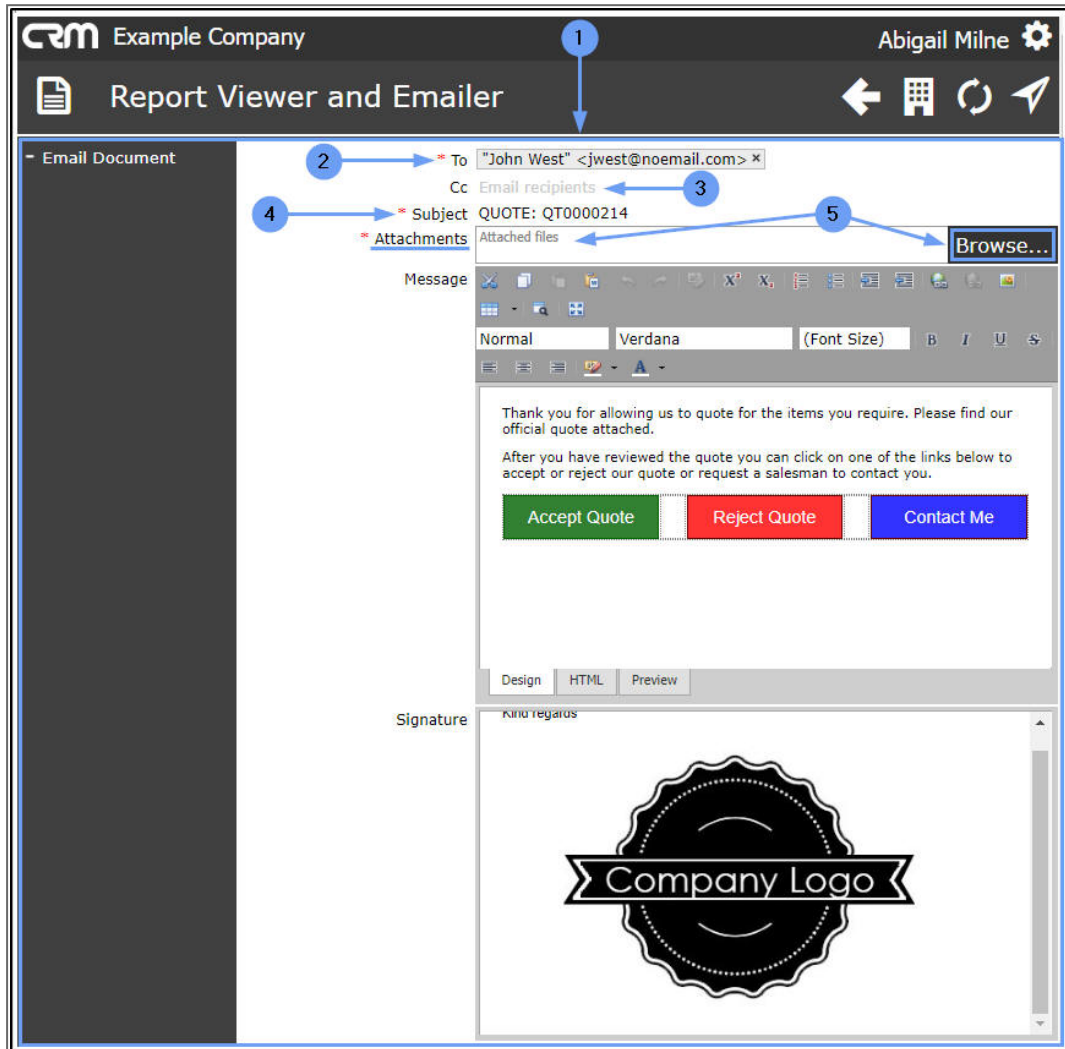
Check and/or add the following details, as necessary:

2. **To:** This will auto populate with the CRM contact for the Quote (case) but you can change this, if required.
3. **Cc:** Here, you can add other email recipients, if applicable.
  - Either click in the field and select customer contacts from the list, or type in additional addresses as noted above (separated by a semi-colon and a space).
4. **Subject:** This field will auto populate with the selected Quote number but you can edit this, if required.

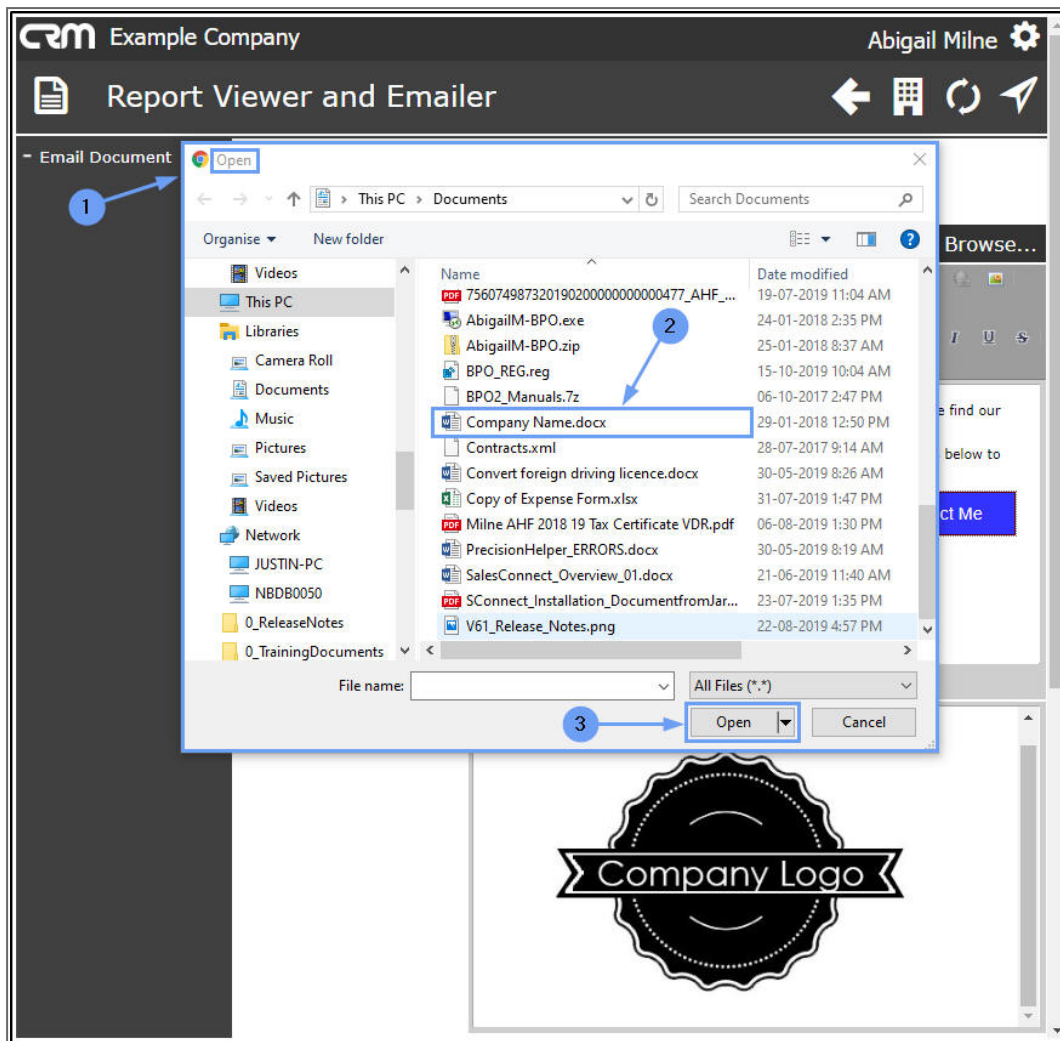
## ADD AN ATTACHMENT

You can add other documents, as attachments, if required.

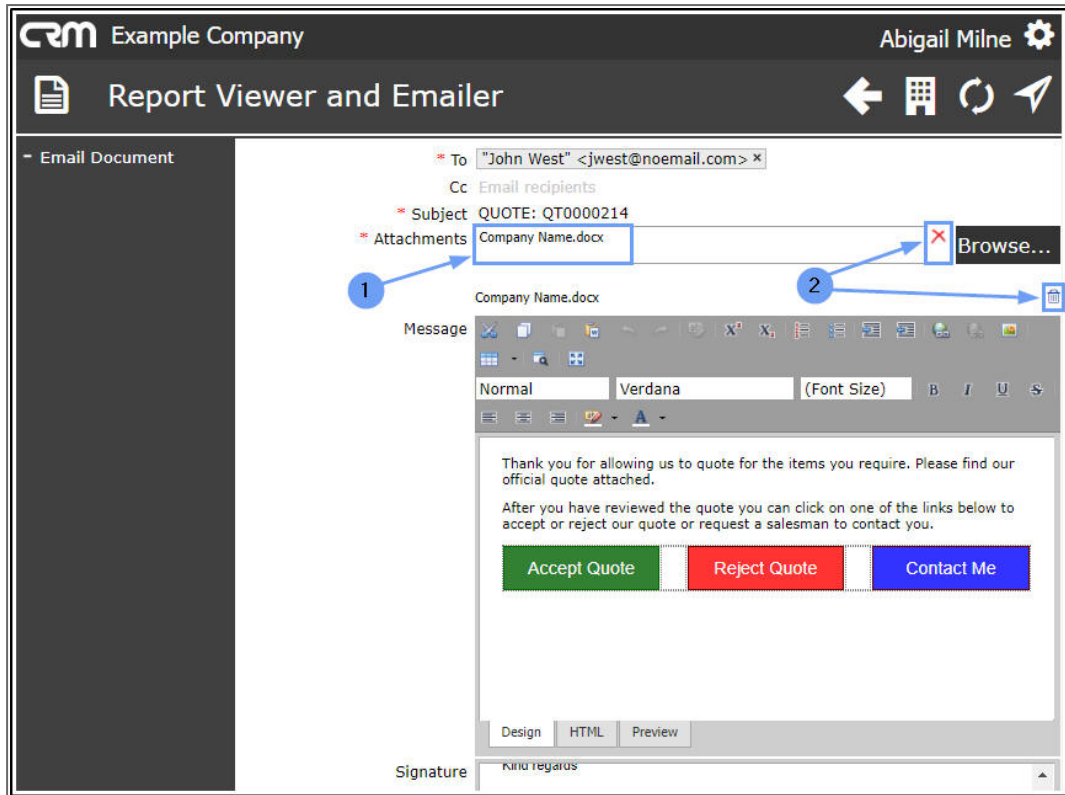
5. **Attachments:** Click on **Browse**.



1. The **Open** screen will pop up.
2. Search for and select the file you wish to link.
3. Click on **Open**.



1. The file will now be attached to the email.
2. You can delete the attachment if required by clicking on either of the **Delete** icons.



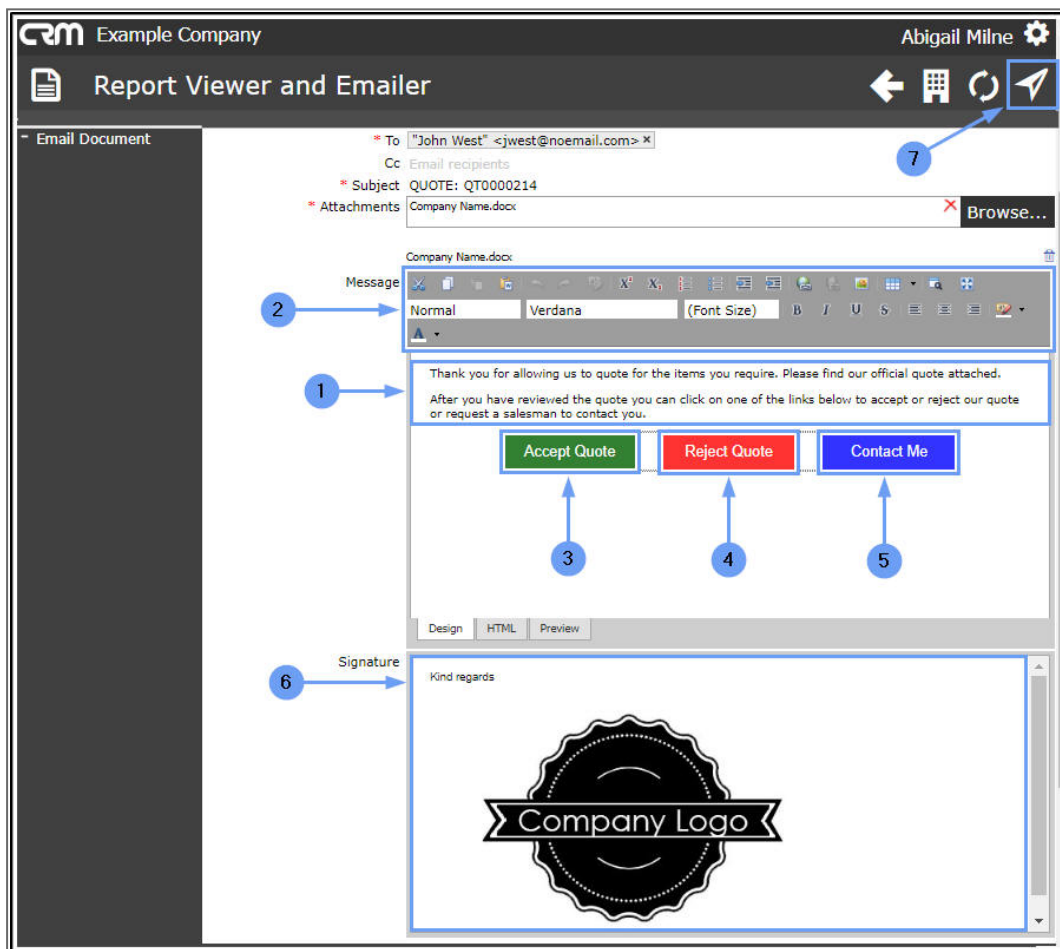
1. A default message will populate the **Message body** but this can be edited, if required.
  - Type in the relevant details in the message body.
2. The **Message tool bar** can be used to customise your email message.

## EMAIL ACTION BUTTONS

The message body contains 3 **Action** buttons that allow the recipient to:

3. **Accept Quote:** If the client selects Accept - the Quote Status will be updated and a quote status notification email will be sent to the salesman (where the Quote Status Notification email flag is set to Yes). The quote will automatically be **marked as accepted** in the **Quotes / Quotes for [ ]** screen.

4. **Reject Quote:** If the client selects Reject - the Quote Status will be updated and a quote status notification email will be sent to the salesman (where the Quote Status Notification email flag is set to Yes). The quote will automatically be **marked as rejected** in the **Quotes / Quotes for [ ]** screen.
5. **Contact Me:** If the client selects to be contacted - the Quote Status will remain unchanged. An email will be sent to the salesman requesting that they follow up with the client.
6. **Signature:** If you have a **Signature configured in CRM** - your Signature will pull through here, otherwise the **Company default CRM mail signature** will pull through.
7. Click on the **Send** icon.



- Email saved to queue.

Report Viewer and Emailer

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+ Email Document


SALESQUOTE

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Example Company

Street No and Road Name

Area

City

South Africa

0000

PO Box 1234

New Town

Durban

South Africa

1234

Req No. : 0000000ssa4521

Fax No. : 031 12 4545

VAT No. : 0000000

Tel No. : 031 123 4567

Document Ref. QT0000214

Date : 2019/10/24 12:00:00 AM

Sales Person : Abigail Mline

Serial No. :

Model No. :

Contract No. :

Reference : HW/Q199

Attention: John West

Customer : HOP001 - Hope Works

Tel No. : 321654987

Fax No. :

Email : jwest@noemail.com

VAT No. : 987654321

Billing Address : PO Box 7452

Forest Hills

New Town

1234

Item Code	Item Description	Quantity	Unit Price	Discount %	Net Price	Total
SP2020	SP2020 Sprint Colour Multi Functional Copier	1.00	5400.00	0.00	5400.00	6210.00
2020-147K	Black toner SP2020	1.00	526.63	0.00	526.63	605.62
2020-147M	Magenta toner SP2020	1.00	540.00	0.00	540.00	621.00

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- VIEW/ EDIT / DELETE QUOTE**

[VIEW QUOTE](#)

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CRM Example Company Abigail Milne

**Quotes for Hope Works**

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000202	HOP001	Hope Works	toner	600.36	ZAR	17 Nov 2017	Order generated	Yes
QT0000203	HOP001	Hope Works	test	14073.30	ZAR	18 Dec 2017	Order generated	Yes
QT0000204	HOP001	Hope Works	1234	20932.74	ZAR	29 Jan 2018	Order generated	Yes
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	New quote	Yes
QT0000210	HOP001	Hope Works	HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000214	HOP001	Hope Works	HW/Q199	7436.62	ZAR	24 Oct 2019	New quote	Yes
QT0000217	HOP001	Hope Works	HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

Page 10 of 10 (99 items) Page size: 10

1. The **Save Quote** page will open.
2. The **Quote**, **Quote Financials** and **Quote Items** frames will be auto expanded.
3. Click on the **expand** icon in the **Case** frame if you wish to view more case information.
4. Click on **View**.

CRM Example Company Abigail Milne

**Save Quote**

Case

Quote

Quote Financials

Quote Items

Subject: Potential sale of 5 machines.

\* A quote will only be created if you add quote line items.

\* Customer: Hope Works

\* Quote Contact: Stewart Hope

Quote Reference: QT0000217

Reference: HWQ202

Comments: Customer requires on-site evaluation.

Date: 4 Nov 2019

\* Site: Durban

\* Print Layout: HOP001\_SALESQUOTE

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\* Currency: South African Rand

Tax Rate: 15.00000

\* Exchange Rate: 1.0000

Quote Terms: Full Payment COD

Commercial: Default

---

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	2.00	5610.67	5400.00	5400.00	10800.00		12420.00	
INVN	2020-147K	Black toner SP2020	1.00	481.70	526.63	526.63	526.63		605.62	
			3.00	6092.37	5926.63	5926.63	11326.63		13025.62	

Delete

View

Save

Copy

- Here you can;

- CRM Example Company

Abigail Milne

Report Viewer and Emailer

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+ Email Document

SALESQUOTE

1 / 1


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3



Sales Quote

Example Company

Street No and Road Name

Area

City

South Africa

0000

Reg No.: 00000000000000000000

VAT No.: 00000000

PO Box 1234

New Town

Durban

South Africa

1234

Fax No.: 031 12 4545

Tel No.: 031 123 4567

Document Ref. QT0000217

Date : 2019/11/04 12:00:00 AM

Sales Person : Abigail Milne

Serial No. :

Model No. :

Contract No. :

Reference : HWQ202

Attention: Stewart Hope

Customer : HOP001 - Hope Works

Tel No. : 031 123 4567

Fax No. :

Email : standard@noemail.com

VAT No. : 987654321

Billing Address : PO Box 7452

Forest Hills

New Town

1234

Item Code	Item Description	Quantity	Unit Price	Discount %	Net Price	Total
SP2020	SP2020 Sprint Colour Multi Functional Copier	2.00	5400.00	0.00	10800.00	12420.00
2020-147K	Black toner SP2020	1.00	526.63	0.00	526.63	605.62

~ Customer requires on-site evaluation.

Sub Total

VAT

Total

ZAR 11326.63

ZAR 1698.99

ZAR 13025.62

dl / mm / yyyy

ph : mm

## EDIT QUOTE

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You can edit some of the details in this **Save Quote** page.

## EDIT THE CASE FRAME

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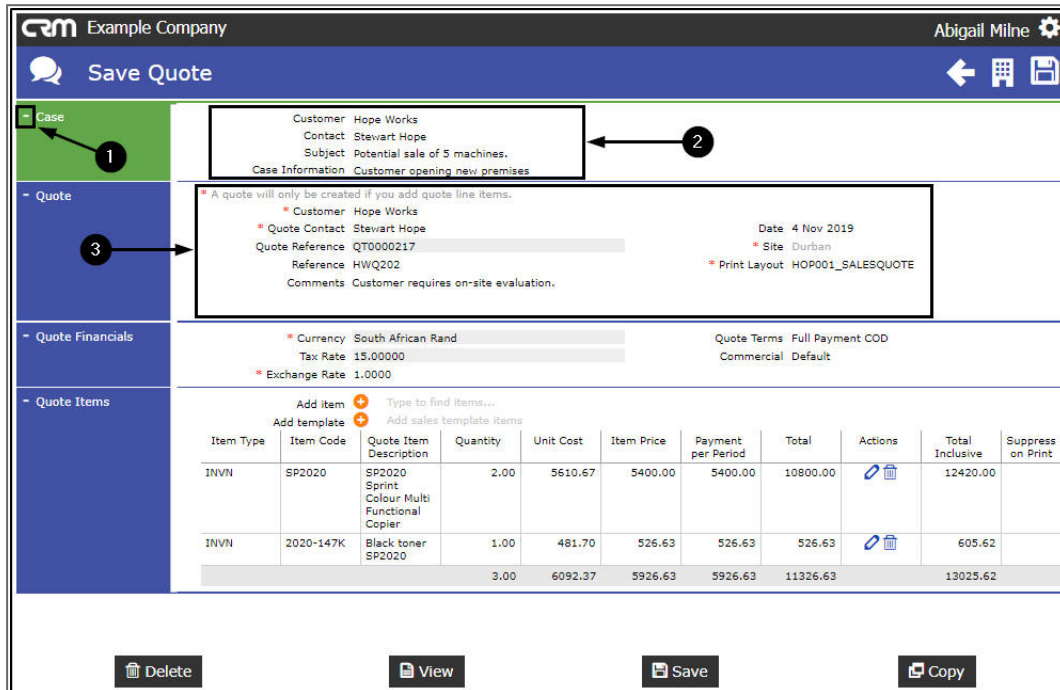
1. **Expand** the Case frame to view all the information.
2. None of the details in this frame can be edited.

## EDIT THE QUOTE FRAME

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3. Some of the details in the **Quotes** frame can be edited:
  - **Customer:** This will auto populate. This field cannot be edited.
  - **Quote Contact:** This will auto populate.
    - You can click on the **drop-down arrow** and select from the list, an alternative contact, if required.
  - **Quote Reference:** This will auto populate with the quote number. This field cannot be edited.
  - **Reference:** This will auto populate but you can edit this, if required.
  - **Comments:** This will auto populate but you can add to or edit the text, if required.
  - **Date:** This will auto populate.
    - You can click on the **drop-down arrow** and select from the list, an alternative date, if required.
  - **Site:** This will auto populate. This field cannot be edited.
  - **Print Layout:** This will auto populate.

- You can click on the **drop-down arrow** and select from the list, an alternative layout, if required and if there are alternatives set up on your CRM.



**CRM Example Company** Abigail Milne

**Save Quote**

**Case**

Customer: Hope Works  
 Contact: Stewart Hope  
 Subject: Potential sale of 5 machines.  
 Case Information: Customer opening new premises





**Quote**





A quote will only be created if you add quote line items.  
 \* Customer: Hope Works  
 \* Quote Contact: Stewart Hope  
 Quote Reference: QT0000217  
 Reference: HWQ202  
 Comments: Customer requires on-site evaluation.  
 Date: 4 Nov 2019  
 \* Site: Durban  
 \* Print Layout: HOP001\_SALESQUOTE

**Quote Financials**

\* Currency: South African Rand  
 Tax Rate: 15.00000  
 \* Exchange Rate: 1.0000  
 Quote Terms: Full Payment COD  
 Commercial: Default

**Quote Items**

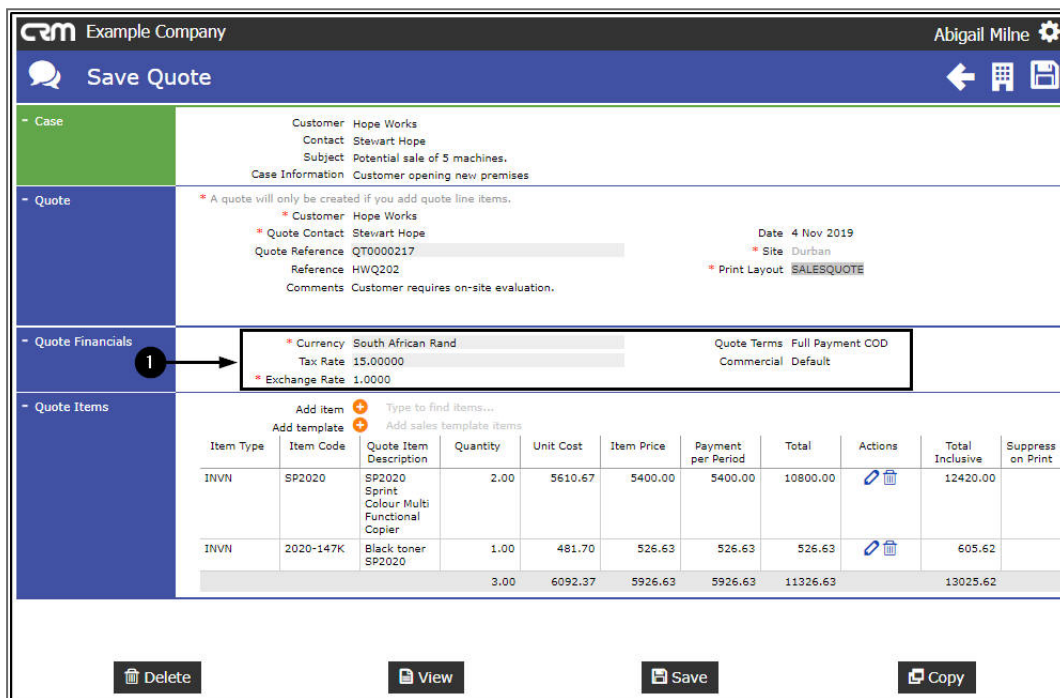
Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	2.00	5610.67	5400.00	5400.00	10800.00	 	12420.00	
INVN	2020-147K	Black toner SP2020	1.00	481.70	526.63	526.63	526.63	 	605.62	
			3.00	6092.37	5926.63	5926.63	11326.63		13025.62	

 Delete  View  Save  Copy

## EDIT THE QUOTE FINANCIALS FRAME

- Some of the details in the **Quote Financials** frame can be edited:
  - Currency:** This will auto populate. This field cannot be edited.
  - Tax Rate:** This will auto populate. This field cannot be edited.
  - Exchange Rate:** This will auto populate.
    - You can delete the current exchange rate and type in the new exchange rate, if required.

- **Quote Terms:** This will auto populate.
  - You can click on the **drop-down arrow** and select alternative payment terms, if required.
- **Commercial:** This will auto populate.
  - You can click on the **drop-down arrow** and select an alternative **commercial**, required.



**CRM Example Company** Abigail Milne

**Save Quote**

**- Case**

Customer: Hope Works  
 Contact: Stewart Hope  
 Subject: Potential sale of 5 machines.  
 Case Information: Customer opening new premises

**- Quote**





\* A quote will only be created if you add quote line items.  
 \* Customer: Hope Works  
 \* Quote Contact: Stewart Hope  
 Quote Reference: QT0000217  
 Reference: HWQ202  
 Comments: Customer requires on-site evaluation.  
 Date: 4 Nov 2019  
 Site: Durban  
 Print Layout: SALESQUOTE

**- Quote Financials**

\* Currency: South African Rand  
 Tax Rate: 15.00000  
 Exchange Rate: 1.0000  
 Quote Terms: Full Payment COD  
 Commercial: Default

**- Quote Items**

Add item + Type to find items...  
 Add template + Add sales template items

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	2.00	5610.67	5400.00	5400.00	10800.00	 	12420.00	
INVN	2020-147K	Black toner SP2020	1.00	481.70	526.63	526.63	526.63	 	605.62	
			3.00	6092.37	5926.63	5926.63	11326.63		13025.62	

**Delete** **View** **Save** **Copy**

## EDIT THE QUOTE ITEMS FRAME

Some of the details in the **Quote Financials** frame can be edited:

1. You can **add more Quote items**, if required.
2. You can **edit the existing Quote items**, if required.
3. You can **delete the existing Quote items**, if required.

CRM Example Company

Abigail Milne

Save Quote

Case

Customer: Hope Works  
Contact: Stewart Hope  
Subject: Potential sale of 5 machines.  
Case Information: Customer opening new premises

Quote

\* A quote will only be created if you add quote line items.

\* Customer: Hope Works  
\* Quote Contact: Stewart Hope  
Quote Reference: QT0000217  
Reference: HWQ202  
Comments: Customer requires on-site evaluation.

Date: 4 Nov 2019  
\* Site: Durban  
\* Print Layout: SALESQUOTE

Quote Financials

\* Currency: South African Rand  
Tax Rate: 15.00000  
\* Exchange Rate: 1.0000

Quote Terms: Full Payment COD  
Commercial: Default

Quote Items

Add item  
Add template

Type to find items...

Add sales template items

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	2.00	5610.67	5400.00	5400.00	10800.00		12420.00	
INVN	2020-147K	Black toner: SP2020	1.00	481.70	526.63	526.63	526.63		605.62	
			3.00	6092.37	5926.63	5926.63	11326.63		13025.62	

Delete

View

Save

Copy

## SAVE QUOTE CHANGES

When you have finished editing the Quote details, either click on the

1. **Save** button

Or the

2. **Save** icon to keep your changes.

CRM Example Company

Abigail Milne

Save Quote

Case

Customer: Hope Works  
Contact: Stewart Hope  
Subject: Potential sale of 5 machines.  
Case Information: Customer opening new premises

Quote

\* A quote will only be created if you add quote line items.

\* Customer: Hope Works

\* Quote Contact: Stewart Hope

Quote Reference: QT0000217

Reference: HWQ202

Comments: Customer requires on-site evaluation.

Date: 4 Nov 2019  
\* Site: Durban  
\* Print Layout: SALESQUOTE

Quote Financials

\* Currency: South African Rand

Tax Rate: 15.00000

\* Exchange Rate: 1.0000

Quote Terms: Full Payment COD

Commercial: Default

Quote Items

Add item

Add template

Type to find items...

Add sales template items

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	2.00	5610.67	5400.00	5400.00	10800.00		12420.00	
INVN	2020-147K	Black toner SP2020	1.00	481.70	526.63	526.63	526.63		605.62	
			3.00	6092.37	5926.63	5926.63	11326.63		13025.62	

Delete

View

Save

Copy

1. A message will pop up informing you that;




- **Quote saved successfully.**

In this **Save Quote** page, you can also select to

2. **Copy** (Clone) this Quote or
3. **Delete** this Quote.
4. Click on **Back** to return to the previous page.

Quote saved successfully.

Save Quote

+ Case Subject: Potential sale of 5 machines.

- Quote

\* A quote will only be created if you add quote line items.

\* Customer: Hope Works Date: 4 Nov 2019

\* Quote Contact: Stewart Hope \* Site: Durban

Quote Reference: QT0000217 \* Print Layout: HOP001\_SALESQUOTE

Reference: HWQ202

Comments: Customer requires on-site evaluation.

- Quote Financials

\* Currency: South African Rand Quote Terms: Full Payment COD





Tax Rate: 15.00000 Commercial: Default

\* Exchange Rate: 1.0000

- Quote Items

Add item  
Add template

Type to find items...  
Add sales template items

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	2.00	5610.67	5400.00	5400.00	10800.00	 	12420.00	
INVN	2020-147K	Black toner SP2020	1.00	481.70	526.63	526.63	526.63	 	605.62	
			3.00	6092.37	5926.63	5926.63	11326.63		13025.62	

Delete

View

Save

Copy

## CREATE COPY (CLONE) OF QUOTE

(from the *Quotes for [selected customer]* page)

1. In the *Quotes for [selected customer]* page,
2. Click on the **Create Copy of Quote** icon next to the Quote that is to be copied.

CRM Example Company Abigail Milne

**Quotes for Hope Works** ← [Grid] ↻

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000202	HOP001	Hope Works	toner	600.36	ZAR	17 Nov 2017	Order generated	Yes
QT0000203	HOP001	Hope Works	test	14073.30	ZAR	18 Dec 2017	Order generated	Yes
QT0000204	HOP001	Hope Works	1234	20932.74	ZAR	29 Jan 2018	Order generated	Yes
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	New quote	Yes
QT0000210	HOP001	Hope Works	HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000214	HOP001	Hope Works	HW/Q199	7436.62	ZAR	24 Oct 2019	New quote	Yes
QT0000217	HOP001	Hope Works	HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

Page 10 of 10 (99 items) 1 2 3 4 5 6 7 8 9 [10] [All] Page size: 10

- The **Create Copy of Quote [selected quote number]** page will open.
  - Follow the process to **copy (clone) this quote**, if required.
- Or click on **Back** to return to the **Quotes for [selected customer]** page.

CRM Example Company Abigail Milne

**Create Copy of Quote QT0000209** ← [Grid] ↻

Customer	* Customer for New Quote Hope Works
Quote Financials	Keep Prices <input type="checkbox"/> Keep the prices from the original quote.
Case	Related Case Not linked to a case

**Create Copy**

- CRM Example Company Abigail Milne

**Quotes for Hope Works**

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000202	HOP001	Hope Works	toner	600.36	ZAR	17 Nov 2017	Order generated	Yes
QT0000203	HOP001	Hope Works	test	14073.30	ZAR	18 Dec 2017	Order generated	Yes
QT0000204	HOP001	Hope Works	1234	20932.74	ZAR	29 Jan 2018	Order generated	Yes
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	New quote	Yes
QT0000210	HOP001	Hope Works	HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000214	HOP001	Hope Works	HW/Q199	7436.62	ZAR	24 Oct 2019	New quote	Yes
QT0000217	HOP001	Hope Works	HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

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CRM Example Company

Quotes for Hope Works

localhost:50000 says

Are you sure you want to set this quote as accepted?

2

OK

Cancel

Abigail Milne

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Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000202	HOP001	Hope Works	toner	600.36	ZAR	17 Nov 2017	Order generated	Yes
QT0000203	HOP001	Hope Works	test	14073.30	ZAR	18 Dec 2017	Order generated	Yes
QT0000204	HOP001	Hope Works	1234	20932.74	ZAR	29 Jan 2018	Order generated	Yes
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	New quote	Yes
QT0000210	HOP001	Hope Works	HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000214	HOP001	Hope Works	HW/Q199	7436.62	ZAR	24 Oct 2019	New quote	Yes
QT0000217	HOP001	Hope Works	HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

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Page size: 10

1. The **Quote Status** will change to '**Accepted Quote**'.
2. The **Mark as Accepted** icon will become inactive (greyed out).
3. The **Edit** icon will become inactive (greyed out) as 'Accepted' quotes cannot be edited.

CRM Example Company

Quotes for Hope Works

Abigail Milne

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Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000202	HOP001	Hope Works	toner	600.36	ZAR	17 Nov 2017	Order generated	Yes
QT0000203	HOP001	Hope Works	test	14073.30	ZAR	18 Dec 2017	Order generated	Yes
QT0000204	HOP001	Hope Works	1234	20932.74	ZAR	29 Jan 2018	Order generated	Yes
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	Accepted quote	Yes
QT0000210	HOP001	Hope Works	HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000214	HOP001	Hope Works	HW/Q199	7436.62	ZAR	24 Oct 2019	New quote	Yes
QT0000217	HOP001	Hope Works	HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

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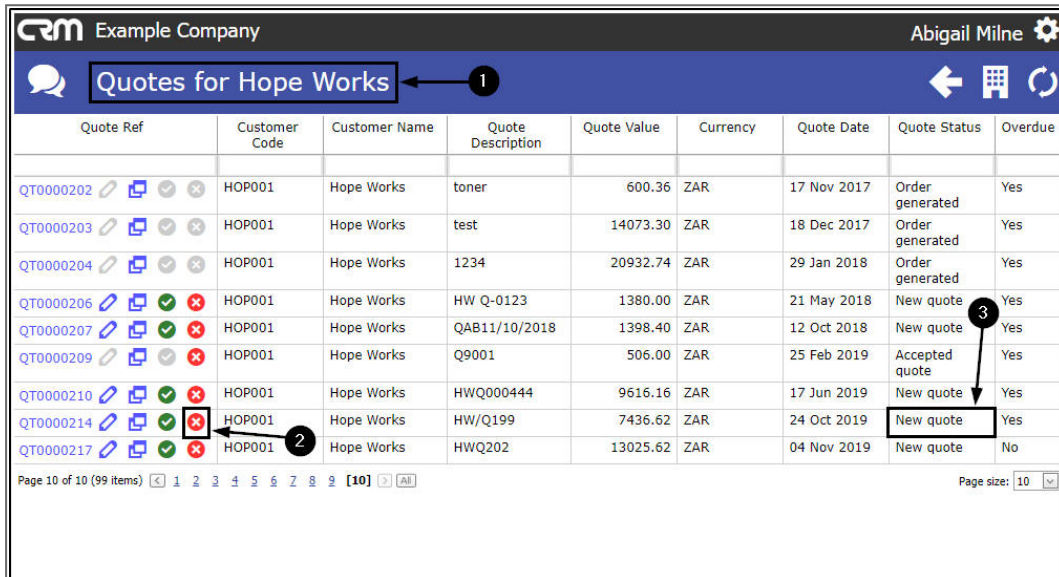
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## MARK QUOTE AS REJECTED

1. In the **Quotes for [selected customer]** page,
2. Click on the **Mark as Rejected** icon next to the Quote that is to be rejected.
3. You will note that the **Quote Status** is currently ' **New Quote**'.



Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000202	HOP001	Hope Works	toner	600.36	ZAR	17 Nov 2017	Order generated	Yes
QT0000203	HOP001	Hope Works	test	14073.30	ZAR	18 Dec 2017	Order generated	Yes
QT0000204	HOP001	Hope Works	1234	20932.74	ZAR	29 Jan 2018	Order generated	Yes
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	Accepted quote	Yes
QT0000210	HOP001	Hope Works	HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000214	HOP001	Hope Works	HW/Q199	7436.62	ZAR	24 Oct 2019	New quote	Yes
QT0000217	HOP001	Hope Works	HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

1. A message box will pop up asking;
  - **Are you sure you want to set this quote as rejected?**
2. Click on **Ok**.

CRM Example Company

Quotes for Hope

localhost:50000 says

Are you sure you want to set this quote as rejected?

2

OK

Cancel

Abigail Milne

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Quote Ref	Customer Code	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000202	HOP001	Hope Works toner	600.36	ZAR	17 Nov 2017	Order generated	Yes
QT0000203	HOP001	Hope Works test	14073.30	ZAR	18 Dec 2017	Order generated	Yes
QT0000204	HOP001	Hope Works 1234	20932.74	ZAR	29 Jan 2018	Order generated	Yes
QT0000206	HOP001	Hope Works HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works Q9001	506.00	ZAR	25 Feb 2019	Accepted quote	Yes
QT0000210	HOP001	Hope Works HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000214	HOP001	Hope Works HW/Q199	7436.62	ZAR	24 Oct 2019	New quote	Yes
QT0000217	HOP001	Hope Works HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

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1. The **Quote Status** will change to '**Rejected Quote**'.
2. The **Mark as Rejected** icon will become inactive (greyed out).
3. The **Edit** icon will become inactive (greyed out) as 'Rejected' quotes can  
not be edited.

CRM Example Company

Quotes for Hope Works

Abigail Milne

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Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000202	HOP001	Hope Works	toner	600.36	ZAR	17 Nov 2017	Order generated	Yes
QT0000203	HOP001	Hope Works	test	14073.30	ZAR	18 Dec 2017	Order generated	Yes
QT0000204	HOP001	Hope Works	1234	20932.74	ZAR	29 Jan 2018	Order generated	Yes
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	Accepted quote	Yes
QT0000210	HOP001	Hope Works	HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000214	HOP001	Hope Works	HW/Q199	7436.62	ZAR	24 Oct 2019	Rejected quote	Yes
QT0000217	HOP001	Hope Works	HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

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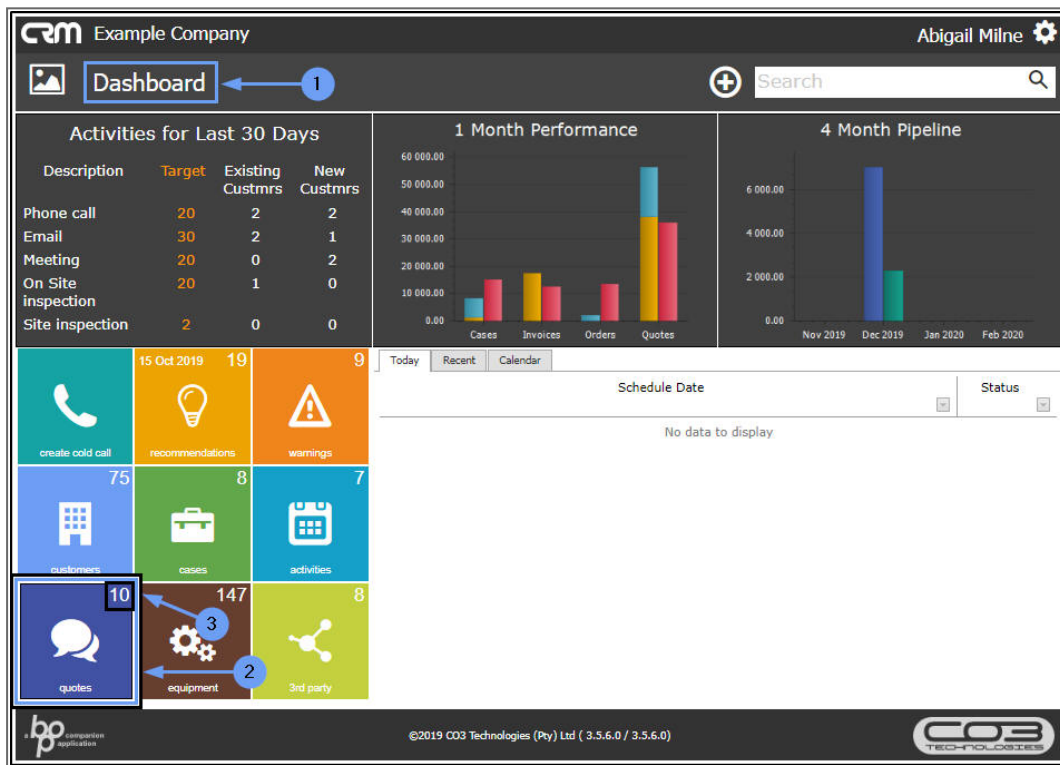
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## ACCESS THE FULL LIST OF QUOTES FROM THE DASHBOARD (HOME PAGE)

To access the full list of all the quotes linked to you as a Salesman, you must navigate from the Dashboard.

1. In the **Dashboard** (Home page),
2. Click on the **Quotes** tile.
3. The number in the top right of this tile shows the **total** number of New, Accepted or Rejected Quotes (for all customers) that are linked to you as the Salesman.



- The **Quotes** listing page will open.
- A list of New, Accepted or Rejected Quotes for all customers on the system, where you are the Salesman, will be displayed.
- For more information refer to **CRM Basics: Quotes**.

CRM

Example Company

Abigail Milne

Quotes

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Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	Accepted quote	Yes
QT0000210	HOP001	Hope Works	HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000211	KIN0002	King Enterprises	Q/KE/001	6815.62	ZAR	19 Jul 2019	Accepted quote	Yes
QT0000212	KIN0001	King Copiers	Q/KC/9002	13025.62	ZAR	30 Jul 2019	New quote	Yes
QT0000213	TRA0001	Training Wheels	TW001	31050.00	ZAR	14 Oct 2019	Accepted quote	Yes
QT0000214	HOP001	Hope Works	HW/Q199	7436.62	ZAR	24 Oct 2019	Rejected quote	Yes
QT0000215	KIN0001	King Copiers	KCQU101	13025.62	ZAR	31 Oct 2019	New quote	No
QT0000217	HOP001	Hope Works	HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

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