

# CRM BASICS

## ADDING / EDITING / DELETING QUOTES

Adding Quotes in CRM, will also create the **quote in BPO** as a **New Quote**.

This new quote will need to be **emailed to the client**. This email include links to either:

- **Accept** or
- **Reject** the Quote

or to have the salesman:

- **Contact Me**

regarding the Quote.

Once Accepted (or Rejected), a quote can no longer be edited.

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## UNDER CONSTRUCTION

We are currently updating our site; thank you for your patience, please check back soon.



Quotes can be added when: **creating a new case or editing a case** , **adding or editing an activity**, or from the **Customer-specific Cases** listing page and the **Customer-specific Activities** listing page.

## ADD A NEW QUOTE WHEN CREATING A CASE...??



## UNDER CONSTRUCTION

We are currently updating our site; thank you for your patience, please check back soon.

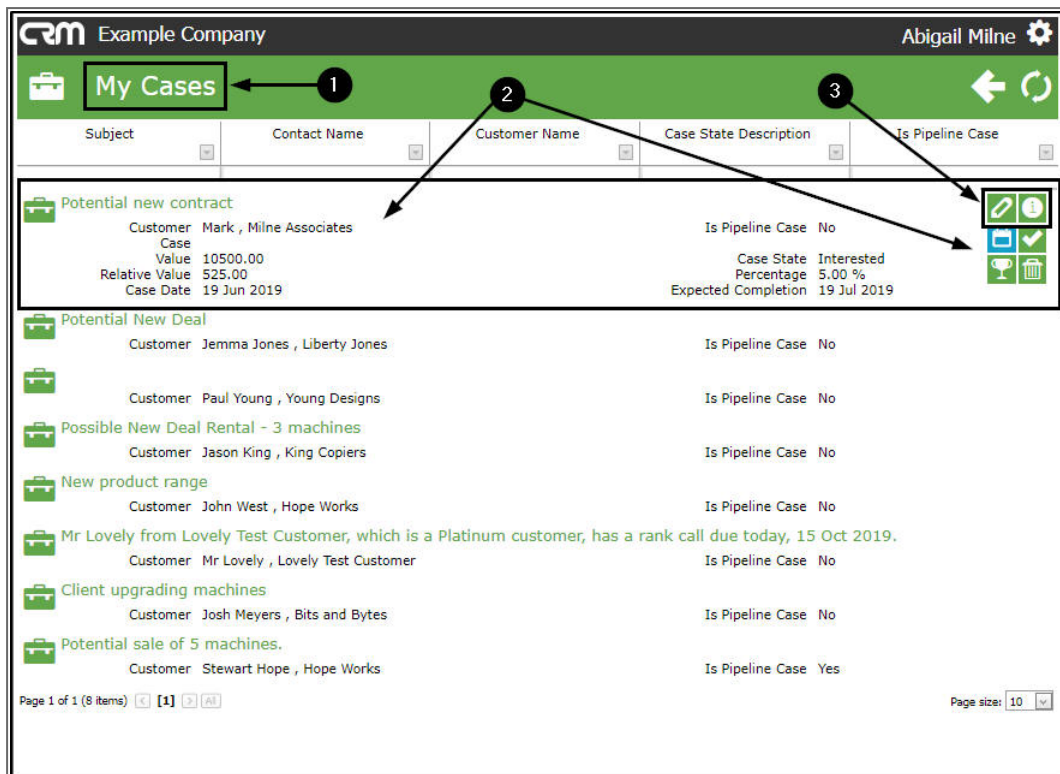


## ADD A NEW QUOTE WHEN EDITING A CASE

1. In the Dashboard,
2. Click on the Cases tile.



1. The **My Cases** page will open.
2. Hover over a selected case to reveal the **Action buttons**.
3. Click on either the **View Case Info and History** button or the **View/Edit this Case** button.
  - (Either of these buttons will direct you to the Save Case page where you can add a new quote.)



The screenshot shows the 'My Cases' page in a CRM system. The page has a green header bar with the 'My Cases' tab selected. Below the header is a table with columns: Subject, Contact Name, Customer Name, Case State Description, and Is Pipeline Case. The first row is expanded, showing details for 'Potential new contract'.

Numbered callouts indicate the following actions:

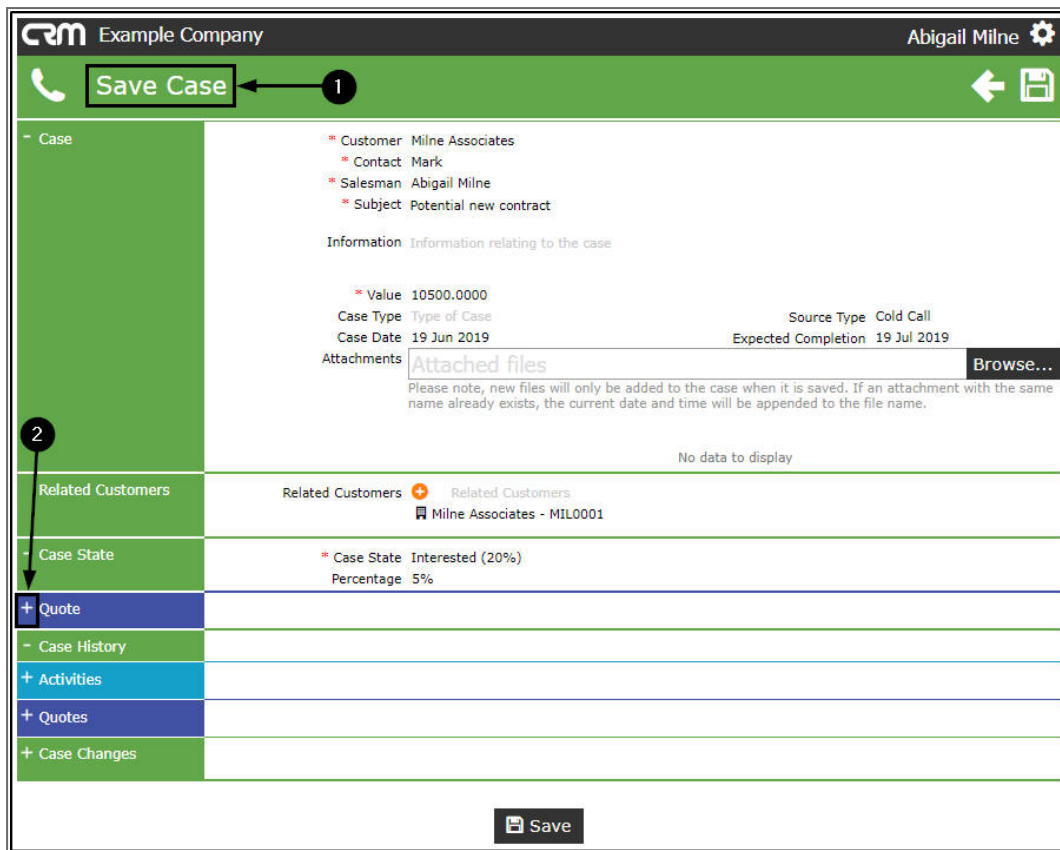
- 1: Click on the 'My Cases' tab.
- 2: Click on the 'Customer Name' column header.
- 3: Click on the 'Is Pipeline Case' column header.

The expanded row for 'Potential new contract' shows the following details:

Customer	Mark , Milne Associates	Is Pipeline Case	No
Case Value	10500.00	Case State	Interested
Relative Value	525.00	Percentage	5.00 %
Case Date	19 Jun 2019	Expected Completion	19 Jul 2019

Below the expanded row, there are several other cases listed, each with a brief description and customer name. The page footer indicates 'Page 1 of 1 (8 items)' and 'Page size: 10'.

1. The **Save Case** page will open.
2. Expand the **Quote** frame.



CRM Example Company Abigail Milne

**Save Case** 1

Case

- \* Customer Milne Associates
- \* Contact Mark
- \* Salesman Abigail Milne
- \* Subject Potential new contract

Information Information relating to the case

- \* Value 10500.0000
- Case Type Type of Case
- Case Date 19 Jun 2019
- Source Type Cold Call
- Expected Completion 19 Jul 2019

Attachments Attached files Browse...

Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

No data to display

Related Customers

Related Customers + Related Customers

Milne Associates - MIL0001

Case State

- \* Case State Interested (20%)
- Percentage 5%

+ Quote

Case History

+ Activities

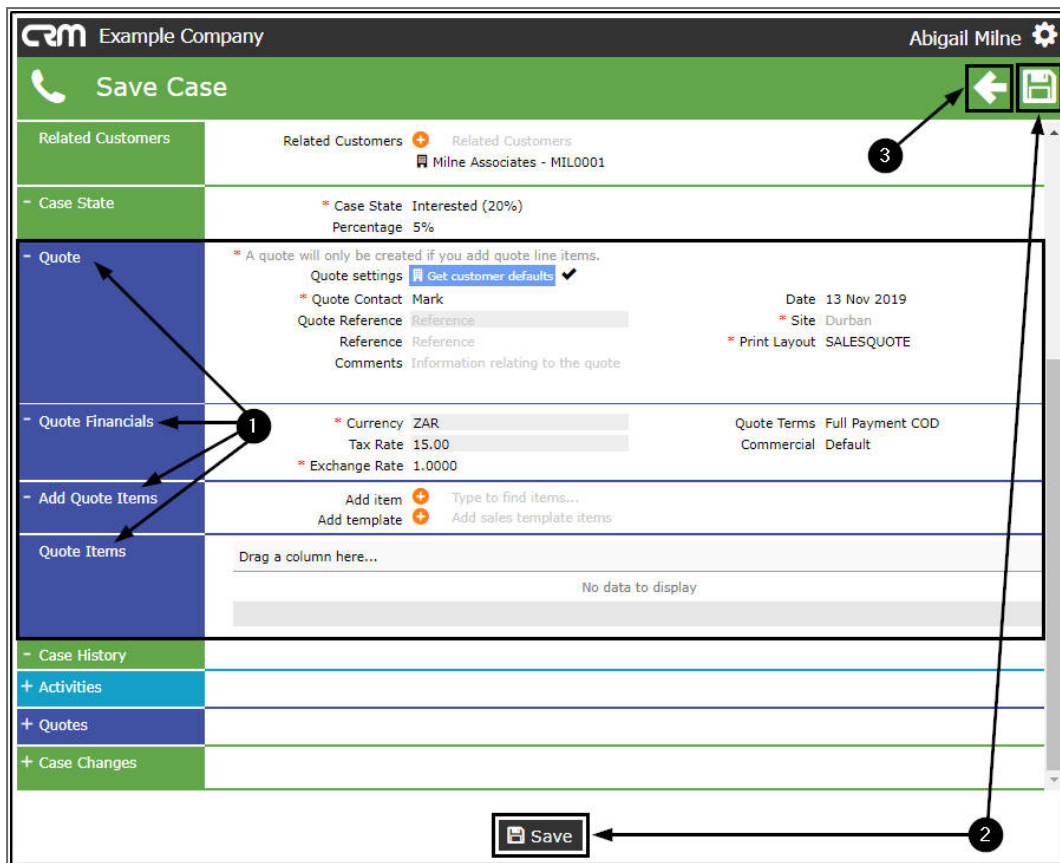
+ Quotes

+ Case Changes

Save

2

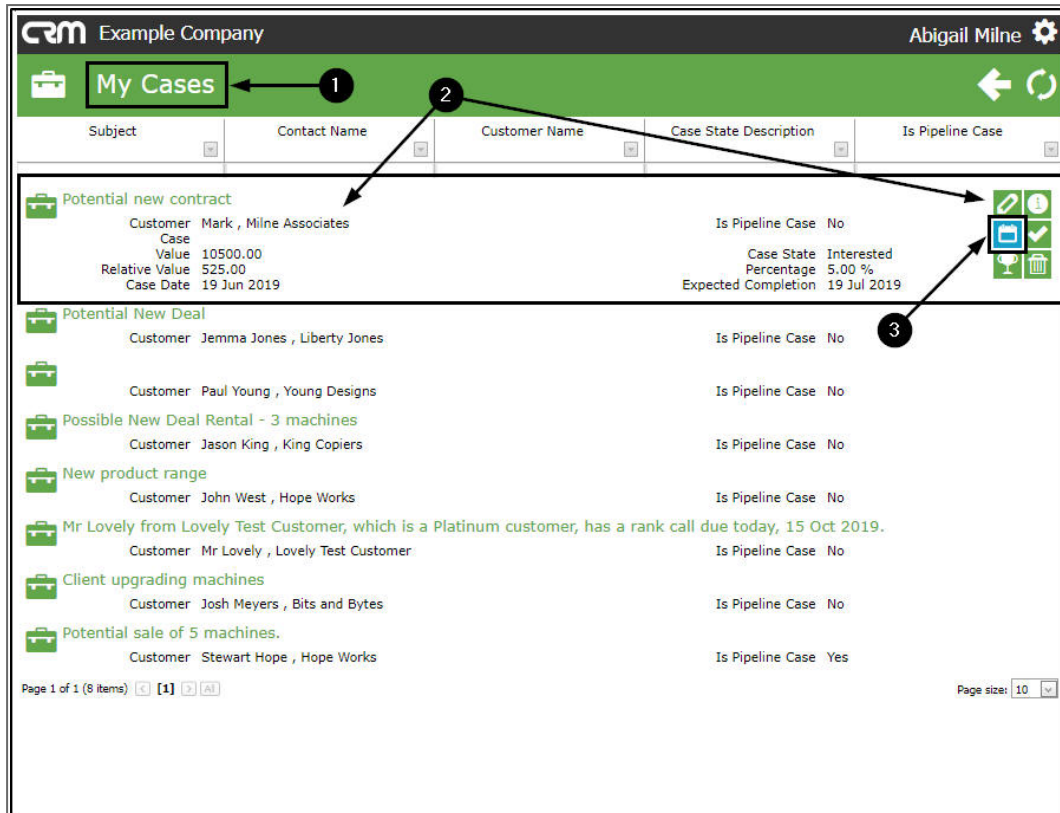
1. The Quote, **Quote Financials**, **Add Quote Items** and **Quote Items** frames will be expanded.
  - Ensure that you have filled in any mandatory fields [\*] and then follow the **Link Quote Process** to create the new quote.
2. Either click on **Save** to keep the changes or
3. Click on **Back** to return to the My Cases Screen.



The screenshot shows the 'Save Case' form in a CRM system. The form is titled 'Save Case' and has a green header bar. The user 'Abigail Milne' is logged in. The form contains several sections: 'Related Customers', 'Case State', 'Quote', 'Quote Financials', 'Add Quote Items', 'Quote Items', 'Case History', 'Activities', 'Quotes', and 'Case Changes'. The 'Quote' section is expanded, showing fields for 'Quote settings', 'Quote Contact', 'Quote Reference', 'Reference', 'Comments', 'Date', 'Site', and 'Print Layout'. The 'Quote Financials' section is also expanded, showing fields for 'Currency', 'Tax Rate', 'Exchange Rate', and 'Quote Terms'. The 'Add Quote Items' section has buttons for 'Add item' and 'Add template'. The 'Quote Items' section is empty. The 'Case History' section shows a list of activities. The 'Activities' section has a 'Save' button. The 'Quotes' section has a 'Save' button. The 'Case Changes' section has a 'Save' button. Numbered callouts are present: 1 points to the 'Quote' section, 2 points to the 'Save' button in the 'Quotes' section, and 3 points to the 'Save' button in the 'Case Changes' section.

## LINK A QUOTE TO AN ACTIVITY IN A CASE

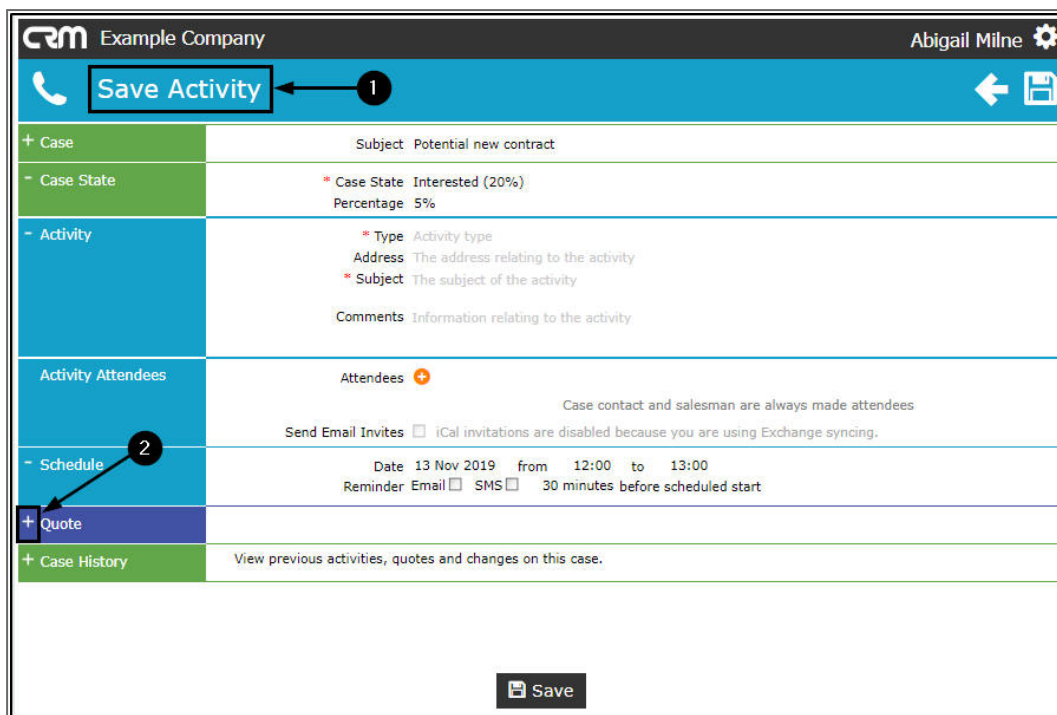
1. In the **My Cases** page,
2. Hover over a selected case to reveal the **Action buttons**.
3. Click on the **New Activity** button.



The screenshot shows the 'My Cases' page in a CRM system. The header includes the company name 'Example Company' and the user 'Abigail Milne'. The main content area displays a list of cases. Callout 1 points to the 'My Cases' header. Callout 2 points to the 'Potential new contract' case. Callout 3 points to the 'Is Pipeline Case' column for the 'Potential New Deal' case.

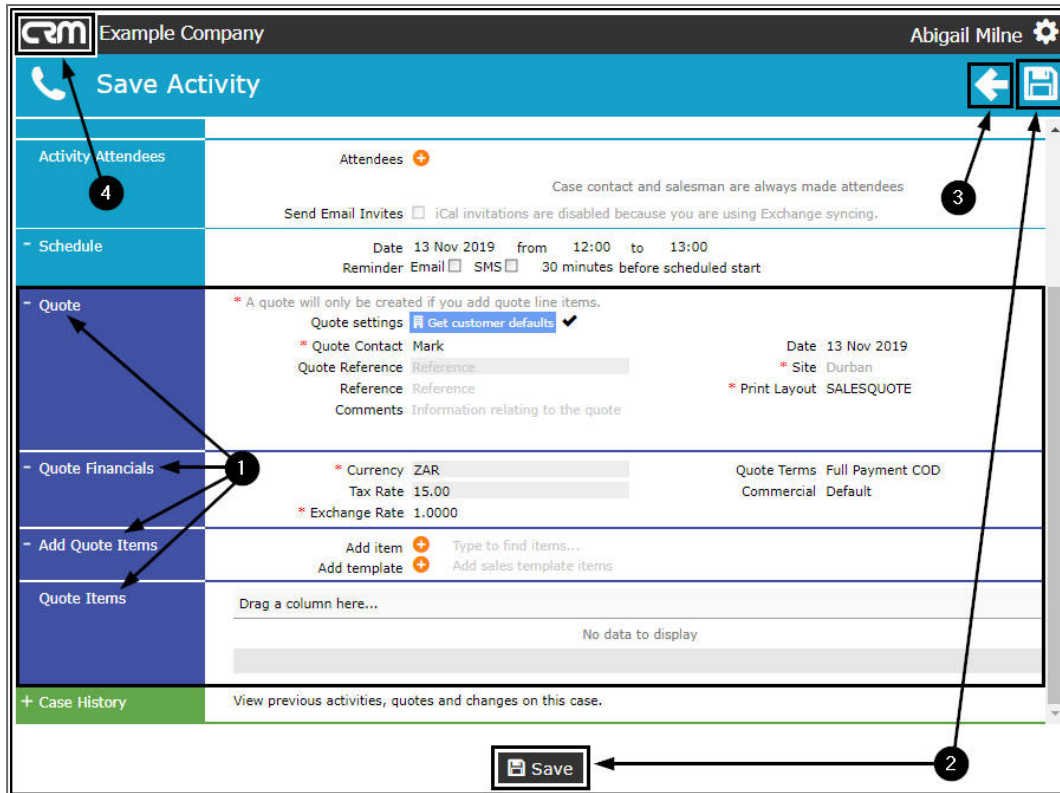
Subject	Contact Name	Customer Name	Case State Description	Is Pipeline Case
Potential new contract	Mark, Milne Associates	Mark, Milne Associates	Interested	No
Potential New Deal	Jemma Jones, Liberty Jones	Jemma Jones, Liberty Jones	Interested	No
Possible New Deal Rental - 3 machines	Jason King, King Copiers	Jason King, King Copiers	Interested	No
New product range	John West, Hope Works	John West, Hope Works	Interested	No
Mr Lovely from Lovely Test Customer, which is a Platinum customer, has a rank call due today, 15 Oct 2019.	Mr Lovely, Lovely Test Customer	Mr Lovely, Lovely Test Customer	Interested	No
Client upgrading machines	Josh Meyers, Bits and Bytes	Josh Meyers, Bits and Bytes	Interested	No
Potential sale of 5 machines.	Stewart Hope, Hope Works	Stewart Hope, Hope Works	Interested	Yes

1. The **Save Activity** page will open.
2. Expand the **Quote** frame.



1. The Quote, **Quote Financials**, **Add Quote Items** and **Quote Items** frames will be expanded.
  - Ensure that you have filled in any mandatory fields [\*] and then follow the **Link Quote Process** to create the new quote.
2. Either click on **Save** to keep the changes or
3. Click on **Back** to return to the My Cases Screen.
4. For the purpose of this manual, click on the **CRM** logo to return to the Dashboard (Home page).





The screenshot shows the 'Save Activity' form in a CRM system. The form is divided into several sections: 'Activity Attendees', 'Schedule', 'Quote', 'Quote Financials', 'Add Quote Items', 'Quote Items', and 'Case History'. Numbered callouts indicate the following steps:

- 1**: Points to the 'Quote' section, specifically the 'Quote settings' area.
- 2**: Points to the 'Save' button at the bottom right of the form.
- 3**: Points to the 'Back' and 'Save' icons in the top right corner of the form.
- 4**: Points to the 'Activity Attendees' section on the left sidebar.

The 'Quote' section contains the following fields and values:

- Quote settings**: ☒ Get customer defaults
- Quote Contact**: Mark
- Quote Reference**: Reference
- Reference**: Reference
- Comments**: Information relating to the quote
- Date**: 13 Nov 2019
- Site**: Durban
- Print Layout**: SALESQUOTE

The 'Quote Financials' section contains the following fields and values:

- Currency**: ZAR
- Tax Rate**: 15.00
- Exchange Rate**: 1.0000
- Quote Terms**: Full Payment COD
- Commercial**: Default

The 'Add Quote Items' section contains the following fields and values:

- Add item**: Type to find items...
- Add template**: Add sales template items

The 'Quote Items' section contains the following text: 'Drag a column here...' and 'No data to display'.

## LINK A QUOTE WHEN EDITING AN ACTIVITY

1. In the *Dashboard*,
2. Click on the *Activities* tile.



**CRM Example Company** Abigail Milne

**Dashboard** (1) Search

**Activities for Last 30 Days**

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

**1 Month Performance**

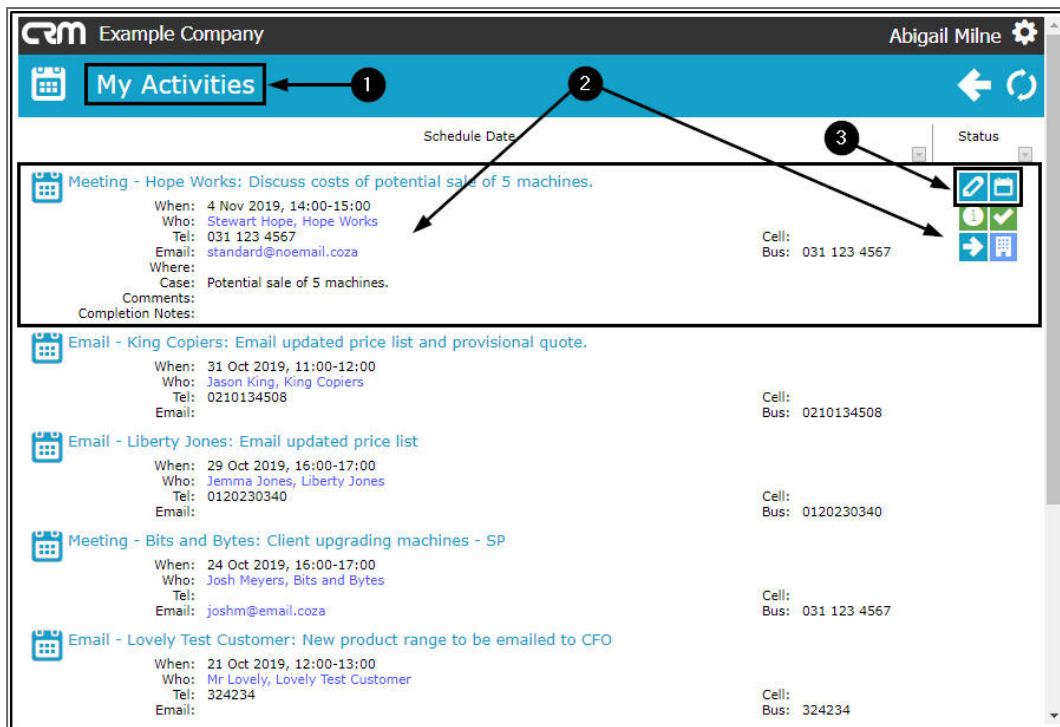
**4 Month Pipeline**

**Activities Grid:**

- create cold call (15 Oct 2019, 19)
- recommendations (19)
- warnings (9)
- customers (75)
- cases (8)
- activities (7)** (2)
- quotes (13)
- equipment (147)
- 3rd party (8)

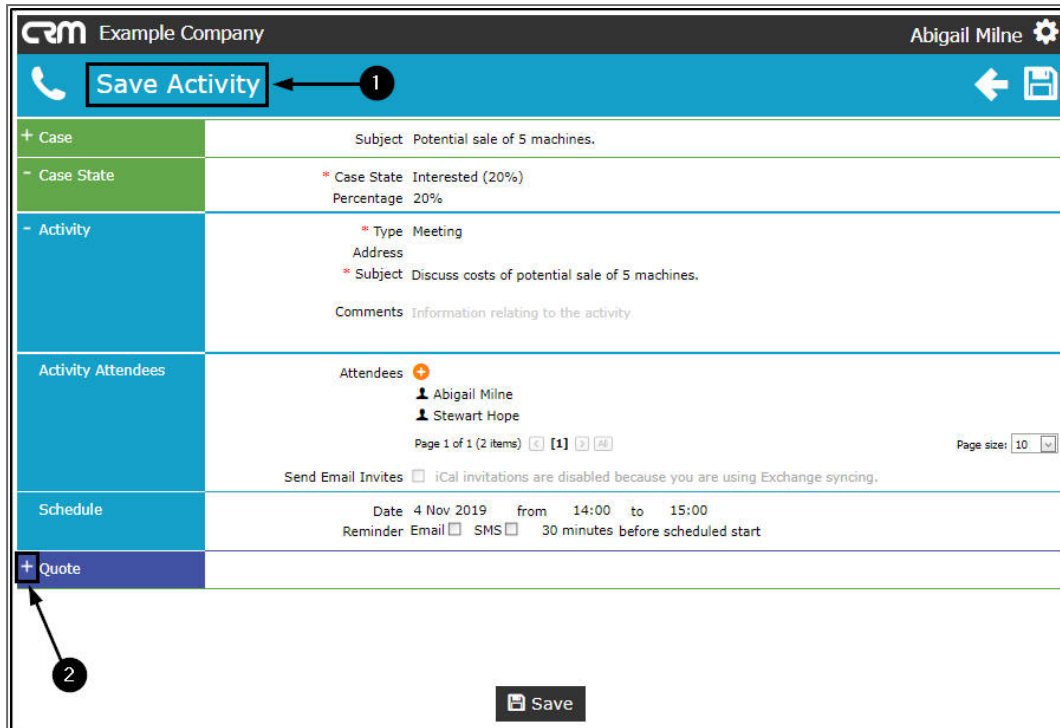
**Footer:** ©2019 CO3 Technologies (Pty) Ltd ( 3.5.6.0 / 3.5.6.0)

1. The **My Activities** page will open.
2. Hover over a selected Activity to reveal the **Action buttons**.
3. Click on either the **View/Edit this Activity** button or the **Reschedule this Activity** button.
  - (Either of these buttons will direct you to the Save Activity page where you can add a new quote.)

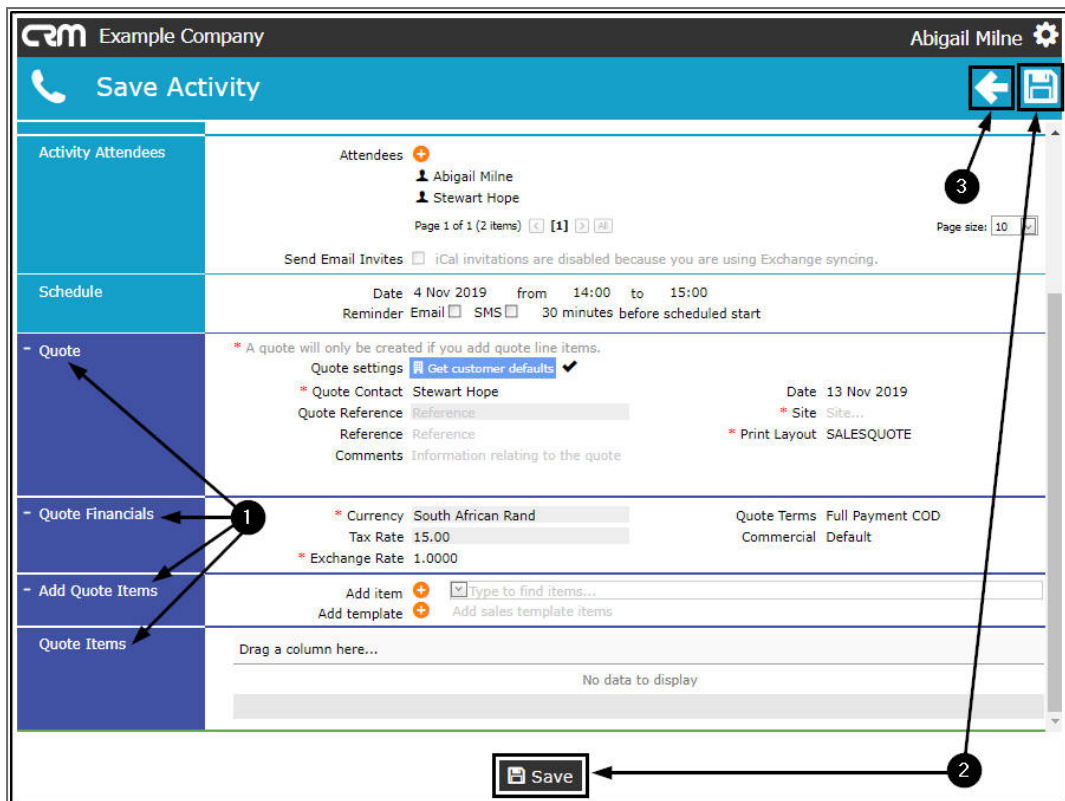


The screenshot shows the 'My Activities' page in a CRM system. The page header includes the company name 'Example Company', the user name 'Abigail Milne', and a settings gear icon. The main content area lists several activities, each with details like 'When', 'Who', 'Tel', 'Email', 'Where', 'Case', 'Comments', and 'Completion Notes'. The first activity is a 'Meeting - Hope Works: Discuss costs of potential sale of 5 machines.' with details for 4 Nov 2019, 14:00-15:00, involving Stewart Hope. The second activity is an 'Email - King Copiers: Email updated price list and provisional quote.' for 31 Oct 2019, 11:00-12:00, involving Jason King. The third activity is an 'Email - Liberty Jones: Email updated price list' for 29 Oct 2019, 16:00-17:00, involving Jemma Jones. The fourth activity is a 'Meeting - Bits and Bytes: Client upgrading machines - SP' for 24 Oct 2019, 16:00-17:00, involving Josh Meyers. The fifth activity is an 'Email - Lovely Test Customer: New product range to be emailed to CFO' for 21 Oct 2019, 12:00-13:00, involving Mr Lovely. The page also features a 'Schedule Date' filter and a 'Status' dropdown. A 'Save Activity' button is located in the top right corner of the activity list.

1. The **Save Activity** page will open.
2. Expand the **Quote** frame.

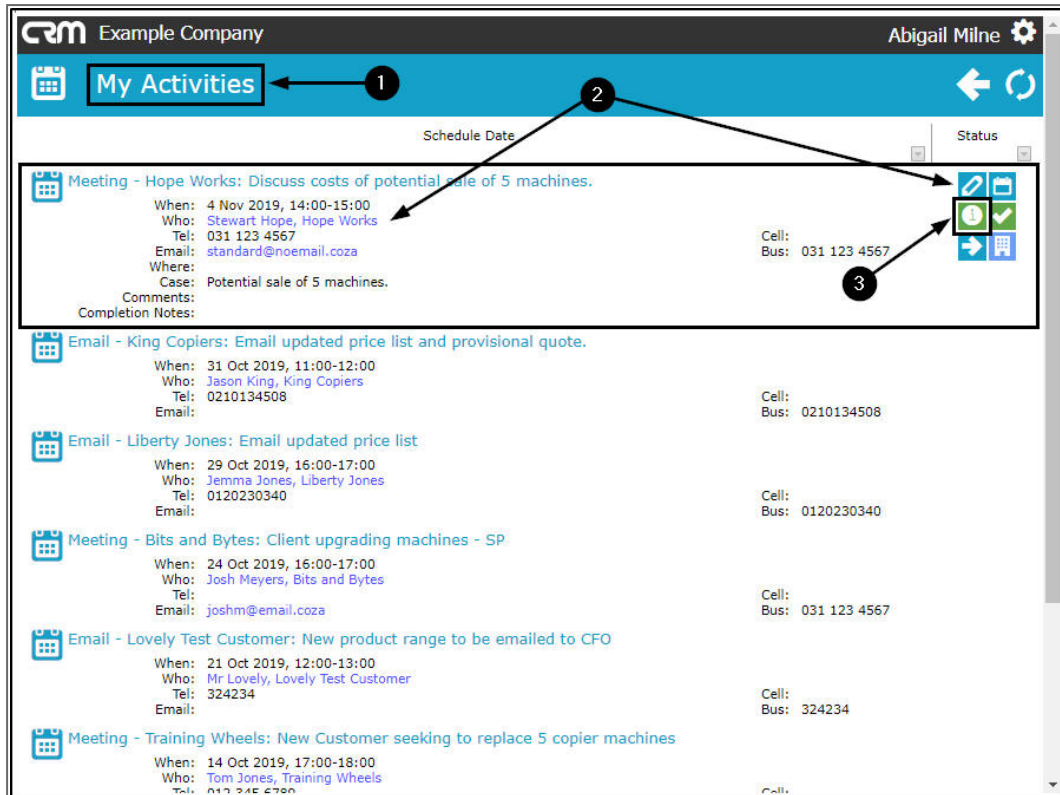


1. The Quote, **Quote Financials**, **Add Quote Items** and **Quote Items** frames will be expanded.
  - Ensure that you have filled in any mandatory fields [\*] and then follow the **Link Quote Process** to create the new quote.
2. Either click on **Save** to keep the changes or
3. Click on **Back** to return to the My Activities Screen.



The screenshot shows the 'Save Activity' form in a CRM system. The form is divided into several sections: 'Activity Attendees', 'Schedule', 'Quote', 'Quote Financials', 'Add Quote Items', and 'Quote Items'. The 'Quote' section is currently selected. In the top right corner, there are two buttons: a back arrow and a save icon. A callout '3' points to the back arrow button. In the bottom right corner, there is a 'Save' button. A callout '2' points to the 'Save' button. On the left side, under the 'Quote' section, there is a list of items: 'Quote Financials', 'Add Quote Items', and 'Quote Items'. A callout '1' points to the 'Quote Financials' item.

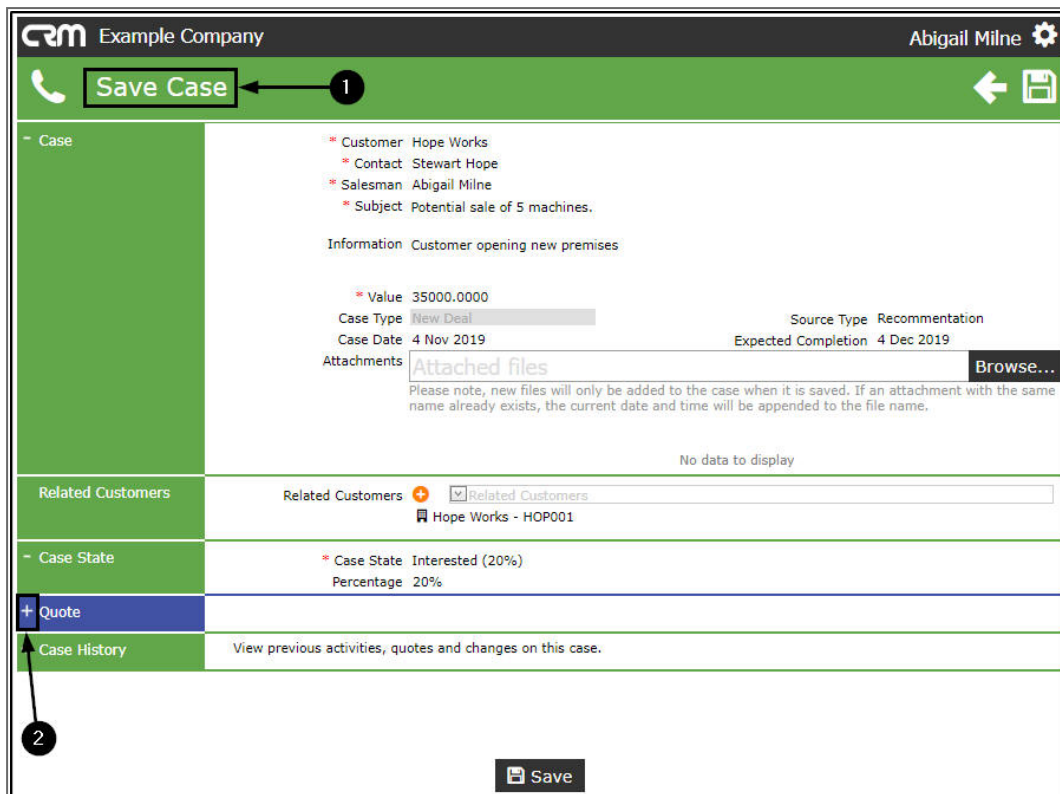
1. In the **My Activities** page,
2. Hover over a selected Activity to reveal the **Action buttons**.
3. Click on the **View Case Info and History** button.



The screenshot shows the 'My Activities' page in a CRM system. The page header includes the company name 'Example Company' and the user 'Abigail Milne'. The main content area lists several activities, each with details like 'When', 'Who', 'Tel', 'Email', 'Where', 'Case', 'Comments', and 'Completion Notes'. Annotations are placed on the page: '1' points to the 'My Activities' header, '2' points to the 'Schedule Date' column, and '3' points to the 'Status' column.

Activity	When	Who	Tel	Email	Where	Case	Comments	Completion Notes	Cell	Bus	Status
Meeting - Hope Works: Discuss costs of potential sale of 5 machines.	4 Nov 2019, 14:00-15:00	Stewart Hope, Hope Works	031 123 4567	standard@noemail.coza		Potential sale of 5 machines.			031 123 4567		
Email - King Copiers: Email updated price list and provisional quote.	31 Oct 2019, 11:00-12:00	Jason King, King Copiers	0210134508						0210134508		
Email - Liberty Jones: Email updated price list	29 Oct 2019, 16:00-17:00	Jemma Jones, Liberty Jones	0120230340						0120230340		
Meeting - Bits and Bytes: Client upgrading machines - SP	24 Oct 2019, 16:00-17:00	Josh Meyers, Bits and Bytes		joshm@email.coza					031 123 4567		
Email - Lovely Test Customer: New product range to be emailed to CFO	21 Oct 2019, 12:00-13:00	Mr Lovely, Lovely Test Customer	324234						324234		
Meeting - Training Wheels: New Customer seeking to replace 5 copier machines	14 Oct 2019, 17:00-18:00	Tom Jones, Training Wheels									

1. The **Save Case** page will open.
2. Expand the **Quote** frame.



CRM Example Company Abigail Milne

**Save Case** 1

Case

- \* Customer Hope Works
- \* Contact Stewart Hope
- \* Salesman Abigail Milne
- \* Subject Potential sale of 5 machines.

Information Customer opening new premises

\* Value 35000.0000

Case Type New Deal Source Type Recommendation

Case Date 4 Nov 2019 Expected Completion 4 Dec 2019

Attachments Attached files Browse...

Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

No data to display

Related Customers

Related Customers + Related Customers

Hope Works - HOP001

Case State

- \* Case State Interested (20%)
- Percentage 20%


+ Quote


Case History View previous activities, quotes and changes on this case.


2



Save

1. The Quote, **Quote Financials**, **Add Quote Items** and **Quote Items** frames will be expanded.
  - Ensure that you have filled in any mandatory fields [\*] and then follow the **Link Quote Process** to create the new quote.
2. Either click on **Save** to keep the changes or
3. Click on **Back** to return to the My Cases Screen.
4. For the purpose of this manual, click on the **CRM** logo to return to the Dashboard (Home page).


Example Company

Abigail Milne





Save Case

4

No data to display


Related Customers

Related Customers

Related Customers  
 Hope Works - HOP001

- Case State

\* Case State Interested (20%)  
Percentage 20%

- Quote

\* A quote will only be created if you add quote line items.  
Quote settings  Get customer defaults ✓  
\* Quote Contact Stewart Hope  
Quote Reference   
Reference   
Comments Information relating to the quote.  
Date 13 Nov 2019  
\* Site   
\* Print Layout SALESQUOTE

- Quote Financials

\* Currency South African Rand  
Tax Rate 15.00  
\* Exchange Rate 1.0000  
Quote Terms Full Payment COD  
Commercial Default

+ Add Quote Items

Quote Items

Drag a column here...  
No data to display

+ Case History

View previous activities, quotes and changes on this case.

Save

2



## **LINK A QUOTE FROM CUSTOMER DASHBOARD WHEN EDITING A CASE**

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Save Quote

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localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case\_info=1&case\_info\_state=2&case\_info...

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Save Quote

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+ Case

Subject New machine - test case

- Quote

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

\* Customer Hope Works

\* Quote Contact Jane Alrich

Quote Reference

Reference OR589

Comments Information relating to the quote

Date 18 Apr 2016

\* Print Layout SALESQUOTE

+ Quote Financials

- Quote Items

Add item

Add template

Drag a column here...

No data to display

💾 Save

- Search for, and select the Quote Contact.
- Type in a reference, e.g. a customer order number.
- Type in comments related to the quote.

Save Quote

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Save Quote

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+ Case

Subject New machine - test case

- Quote

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

\* Customer Hope Works

\* Quote Contact Jane Alrich

Quote Reference

Reference OR589

Comments Information relating to the quote

Date 18 Apr 2016

\* Print Layout SALESQUOTE

+ Quote Financials

- Quote Items

Add item

Add template

Drag a column here...

No data to display

💾 Save

- Search for, and select the Quote Contact.
- Type in a reference, e.g. a customer order number.
- Type in comments related to the quote.

Save Quote

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Save Quote

💾

+ Case

Subject New machine - test case

- Quote

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

\* Customer Hope Works

\* Quote Contact Jane Alrich

Quote Reference

Reference OR589

Comments Information relating to the quote

Date 18 Apr 2016

\* Print Layout SALESQUOTE

+ Quote Financials

- Quote Items

Add item

Add template

Drag a column here...

No data to display

💾 Save

- Search for, and select the Quote Contact.
- Type in a reference, e.g. a customer order number.
- Type in comments related to the quote.

Save Quote

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Save Quote

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+ Case

Subject New machine - test case

- Quote

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

\* Customer Hope Works

\* Quote Contact Jane Alrich

Quote Reference

Reference OR589

Comments Information relating to the quote

Date 18 Apr 2016

\* Print Layout SALESQUOTE

+ Quote Financials

- Quote Items

Add item

Add template

Drag a column here...

No data to display

💾 Save



- Expand the 'Quote Financials' section to view the customer's currency, tax rate and exchange rate.
- This section also includes the ' **Quote Terms** ' - this is the quote repayment factor and should be configured in Static Rights ( [Sales Quote Repayment Method](#) ).
- Select the terms as required for this quote.

Save Quote

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Save Quote

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+ Case

Subject New machine - test case

- Quote

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

\* Customer Hope Works

\* Quote Contact Jane Alrich

Quote Reference

Reference OR589

Comments Information relating to the quote

Date 18 Apr 2016

\* Print Layout SALESQUOTE

- Quote Financials

\* Currency

Tax Rate 14.00

\* Exchange Rate 1.0000

Quote Terms

Commercial

Payments	Payment Period
1	Full Payment COD
12	12 Months
6	6 Months

- Quote Items

Add item

Add template

Drag a column here...

No data to display

Save

- You now have the ability to **add single items** to a quote (with or without also using quote templates).
- **Note:** For Part Numbers to pull through to this list - you need to ensure that the [Quote Products are specified](#).

Save Quote

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Save Quote

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+ Case

Subject New machine - test case

- Quote

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

\* Customer Hope Works

\* Quote Contact Jane Alrich

Quote Reference

Reference OR589

Comments Information relating to the quote

Date 18 Apr 2016

\* Print Layout SALESQUOTE

+ Quote Financials

- Quote Items

Add item

Add template

Drag a column here...

Type	Code	Description	#
INN	SP2020	SP2020 Sprint Colour M	1
INN	2020-147X	Black toner SP2020	2
INN	SP19-147Y	Yellow Toner - SP1919	6
INN	SP19-147M	Magenta toner - SP1915	7
INN	2020-147M	Magenta toner SP2020	8
INN	2020-147C	Cyan toner SP2020	9
INN	CL-100-965	Cleaner	11

💾 Save

- Type in the text field to filter on the Code and Description lines.
- Click on the item you want to add

Save Quote

[←](#)
[→](#)
[↺](#)

localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case\_info=1&case\_info\_state=2&case\_info...

Save Quote

+ Case

Subject New machine - test case

- Quote

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

Customer Hope Works

Quote Contact Jane Alrich Date 18 Apr 2016

Quote Reference  Reference

Reference OR589

Comments Information relating to the quote

+ Quote Financials

- Quote Items

Add item

SP2020

×

+

Add template

Drag a column here...

Type	Code	Description	#
INN	SP2020	SP2020 Sprint Colour Mt.	1
INN	2020-147K	Black toner SP2020	2
INN	2020-147M	Magenta toner SP2020	8
INN	2020-147C	Cyan toner SP2020	9
INN	2020-147L	SP2020 Clear Toner	24
INN	2020-147Y	Yellow toner SP2020	10
INN	20-753	SP2020 Fuser Unit	64

Save

- Click on the 'Add Item' button

Save Quote

localhost:50000/bpocm/MaintainQuote.aspx?CaseID=5&case\_info=1&case\_info\_state=2&case\_info

Save Quote

+ Case

Subject New machine - test case

- Quote

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

Customer Hope Works

Quote Contact Jane Alrich

Quote Reference Reference

Reference OR589

Comments Information relating to the quote

Date 18 Apr 2016

Print Layout SALESQUOTE

+ Quote Financials

- Quote Items

Add item INVN | SP2020 | SP2020

Add template Add sales template items

Drag a column here...

No data to display

Save

- The item will be added to the Quote Line Items sections

Save Quote

localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case\_info=1&case\_info\_state=2&case\_info...

Save Quote

+ Case

Subject New machine - test case

- Quote

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

\* Customer Hope Works

\* Quote Contact Jane Alrich Date 18 Apr 2016

Quote Reference Reference \* Print Layout SALESQUOTE

Reference OR589



Comments Information relating to the quote

+ Quote Financials

- Quote Items

Add item INVN | SP2020 | SP2020 Sp

Add template Add sales template items

Actions	Item Type	Item Code	Quantity	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
 	INVN	SP2020	1	12250.00	9500.00		9500.00	10830.00
				12250.00	9500.00	0.00	9500.00	10830.00

Save

- To add Sales Templates: click on the 'Add Quote Template Items' dropdown
- You could also type into the text box to filter for the template you need
- Click on the template required.
- Link the templates items by clicking on the 'Add Items' button



Save Quote

localhost:5000/bpocrm/MaintainQuote.aspx?CaseID=5&case\_info=1&case\_info\_state=2&case\_info...

Save Quote

+ Case

Subject New machine - test case

- Quote

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

Customer Hope Works

Quote Contact Jane Alrich

Quote Reference

Reference OR589

Comments Information relating to the quote

Date 18 Apr 2016



Print Layout SALESQUOTE

+ Quote Financials

- Quote Items

Add Item INVN | SP2020 | SP2020 Sp

Add template

Actions	Item Type	Item Name	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
 	INVN	SP1020 Standard Package	12250.00	9500.00		9500.00	10830.00
			12250.00	9500.00	0.00	9500.00	10830.00

Save

- You can **edit a line** item, by clicking on the 'Edit' button on that line.

Save Quote

localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case\_info=1&case\_info\_state=2&case\_info...

Save Quote

+ Case

Subject New machine - test case

- Quote

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

\* Customer Hope Works

\* Quote Contact Jane Alrich Date 18 Apr 2016

Quote Reference  \* Print Layout SALESQUOTE

Reference OR589











Comments Information relating to the quote

+ Quote Financials

- Quote Items

Add item INVN | SP2020 | SP2020 Sp

Add template SP1020 Standard Package

Actions	Item Type	Item Code	Quantity	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
 	INVN	SP2020	1	12250.00	9500.00		9500.00	10830.
 	INVN	SP1020	1	7500.00	8625.00	8625.00	8625.00	9832.
 	INVN	1020-478	1	0.00	0.00	0.00	0.00	0.
 	INVN	1020-147K	1	350.00	402.50	402.50	402.50	458.
 	INVN	1020-147C	1	0.00	0.00	0.00	0.00	0.

Save

- The quote item edit section will come up.
- Make the changes required.
- Click on 'Update' to view the changes in the quote.
- Click on 'Done' when you have completed all the changes.

Save Quote

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Save Quote

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Case

Subject New machine - test case

Quote

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\* Customer Hope Works

\* Quote Contact Jane Alrich

Quote Reference

Reference OR589

Comments Information relating to the quote

Date 18 Apr 2016

\* Print Layout SALESQUOTE

Quote Financials

Quote Items

Add Item INVN | SP2020 | SP2020 Sp

Add template SP1020 Standard Package

Actions	Item Type	Item Code	Quantity	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
	INVN	SP2020	1	12250.00	9500.00		9500.00	10830.00

Quote Item Description

SP2020 Sprint

Quantity 1

Unit Cost 12250.000000

Item Price 9500.00

Update Done

🗑️	INVN	SP1020	1	7500.00	8625.00	8625.00	8625.00	9832.50
🗑️	INVN	1020-478	1	0.00	0.00	0.00	0.00	0.00
🗑️	INVN	1020-1476	1	350.00	403.50	403.50	403.50	450.00

Save

- Click on the 'delete' button to remove line items from the quote.

Save Quote

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Save Quote

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Case

Subject New machine - test case

Quote

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\* Customer Hope Works

\* Quote Contact Jane Alrich

Quote Reference

Reference OR589

Comments Information relating to the quote

Date 18 Apr 2016








\* Print Layout SALESQUOTE

Quote Financials

Quote Items

Add item INVN | SP2020 | SP2020 Sp

Add template SP1020 Standard Package

Actions	Item Type	Item Code	Quantity	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
 	INVN	SP2020	1	12250.00	9500.00		9500.00	10830.00
 	INVN	SP1020	1	7500.00	8625.00	8625.00	8625.00	9832.50
 	INVN	1020-478	1	0.00	0.00	0.00	0.00	0.00
 	INVN	1020-147K	1	350.00	402.50	402.50	402.50	458.85
 	INVN	1020-147C	1	0.00	0.00	0.00	0.00	0.00

Save

- *Note: A new Quote Terms method can be selected, which will reapply the 'Repayment Amount per Period'*

Save Quote

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Save Quote

Case

Subject New machine - test case

Quote

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

Customer Hope Works

Quote Contact Jane Alrich Date 18 Apr 2016

Quote Reference Reference Print Layout SALESQUOTE

Reference OR589

Comments Information relating to the quote

Quote Financials

Currency South African Rand Quote Terms 12 Months

Tax Rate 14.00 Commercial Default

Exchange Rate 1.0000

Quote Items

Add item INVN | SP2020 | SP2020 Sp

Add template SP1020 Standard Package

Actions	Item Type	Item Code	Quantity	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
	INVN	SP2020	1	12250.00	9500.00	1235.00	9500.00	10830.00
	INVN	SP1020	1	7500.00	8625.00	1121.25	8625.00	9832.50
	INVN	1020-478	1	0.00	0.00	0.00	0.00	0.00
	INVN	1020-147K	1	350.00	402.50	52.33	402.50	458.85

Save

- Make sure you 'Save' once you are done.

Save Quote

localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case\_info=1&case\_info\_state=2&case\_info...

Save Quote

Case

Subject New machine - test case

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Quote Reference Reference \* Print Layout SALESQUOTE

Reference OR589

Comments Information relating to the quote

Quote Financials

\* Currency South African Rand Quote Terms 12 Months





Tax Rate 14.00 Commercial Default

\* Exchange Rate 1.0000

Quote Items

Add Item INVN | SP2020 | SP2020 Sp

Add template SP1020 Standard Package

Actions	Item Type	Item Code	Quantity	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
	INVN	SP2020	1	12250.00	9500.00	1235.00	9500.00	10830.00
	INVN	SP1020	1	7500.00	8625.00	1121.25	8625.00	9832.50
	INVN	1020-478	1	0.00	0.00	0.00	0.00	0.00
	INVN	1020-147K	1	350.00	402.50	52.33	402.50	458.85

Save

**See Also:**

- [View / Print / Email the Quote](#)

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