

SALES STUDIO QUOTES

ADD COMMENTS

All quotes created in Sales Studio can be found in the **Sales Quotes** listing screen after selecting the applicable **Site** and **Status**.

Follow the process set out below to *add Comments* to a quote in the system.

Version Compatibility

- BPO2 v 2.3.0.2
- Sales Studio v 1.0.0.21
- Configurator v 2.2.0.0
- CRM v 3.5.7.5

Ribbon Access: Sales Studio > Sales > Quotes

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Quotes Sales				

SELECT THE SITE AND STATUS

- 1. The *Sales Quotes* listing screen will open.
- 2. The relevant *Site* will need to be selected,
- 3. before quotes will be displayed in the data grid.



Add Comments

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- Click on the drop-down arrow in the *Site* field to display the *Site Name* menu.
- Select from the list the particular site that contains the quote that you wish to link *Comments* to.

Note 1: If you are *creating a new quote*, you do <u>not</u> need to select the *Status*. If you are adding Comments to a *current* quote then you <u>will</u> need to select the Status.

Note 2: Only quotes in Status: '*New Quote*' or '*Salesman Released Quote*' can have Comments added to them.

GENERAL BPO2 INTERFACE FUNCTIONALITY

The following basic BPO2 functionality applies in this screen:

1. Format:

- Save Layout
- Workspaces
- Save Filter



- 2. Current:
 - *Refresh*: Clicking on this button will update the currently displayed page.
- 3. Open Windows:
 - Open Windows
- 4. Data Grids:
 - Refer to <u>Using BPO Data Grids</u> and <u>Data Grid Filtering</u> for further information regarding data grid functionality that can be utilised here.

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