SALES STUDIO QUOTES

CONVERT QUOTE TO ORDER

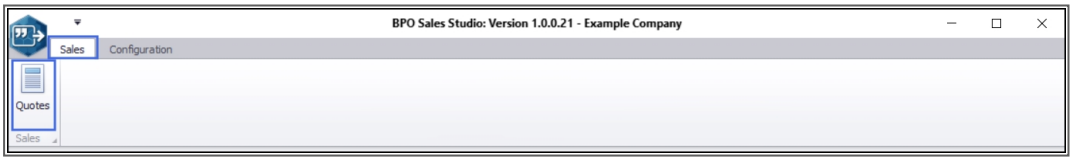
All quotes created in Sales Studio can be found in the **Sales Quotes** listing screen after selecting the applicable **Site** and **Status**.

Follow the process below to **Convert a Quote to an Order** 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

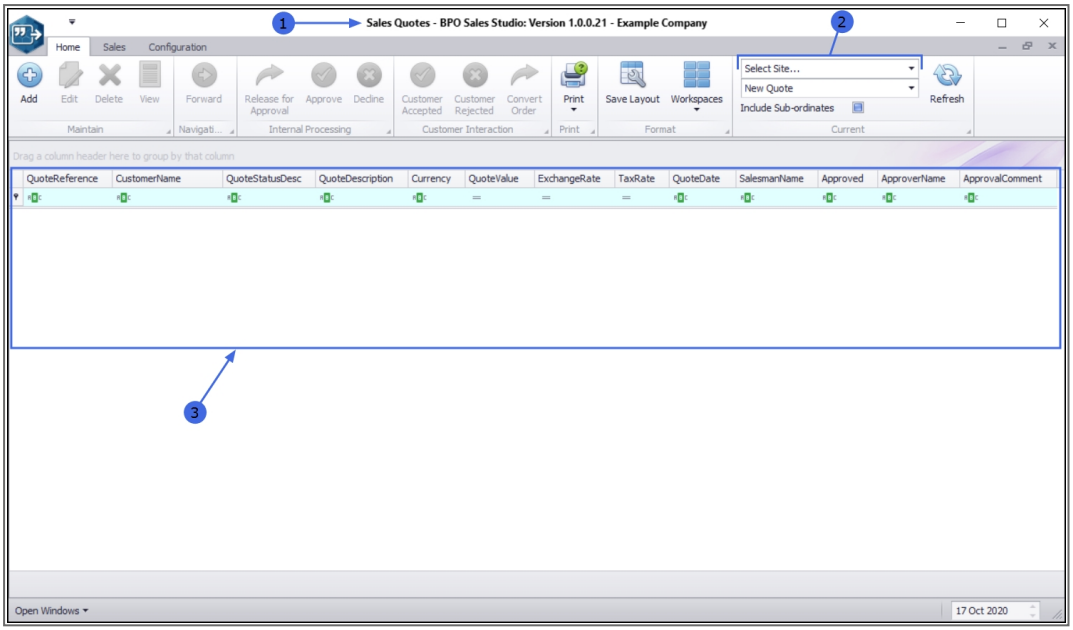
Ribbon Access: *Sales Studio > Sales > Quotes*



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.

CO3 Technologies (Pty) Ltd © Company Confidential



1. Click on the drop-down arrow in the ***Site*** field to display the ***Site Name*** menu.
2. Select from the list the particular site that contains the quote that you wish to ***Convert to an Order***.

Note: Only quotes in Status: ' **...** ' can be Converted to an Order.

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

CO3 Technologies (Pty) Ltd © Company Confidential

4. **Data Grids**:
    - Refer to Using BPO Data Grids and Data Grid Filtering for further information regarding data grid functionality that can be utilised here.

MNU.168.017

CO3 Technologies (Pty) Ltd © Company Confidential