

SALES STUDIO QUOTES

PRINT SALES PROPOSAL

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 **Print a Sales Proposal** from 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

| | Ŧ | BPO Sales Studio: Version 1.0.0.21 - Example Company | - | × |
|-----------------|-------|--|---|---|
| | Sales | onfiguration | | |
| | | | | |
| 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.



| Home Sales Configuration | Comment |
|---|---------|
| Add Edit Delete Vew Formard Release for Approve Decine Approval Customer Customer Convert Print Save Layout New Quote Refresh Maintain Navigat Internal Processing Customer Interaction Print Save Layout Workspaces New Quote Refresh Drag a column header here to group by that column QuoteReference QuoteDescription Currency QuoteNeefference TaxRate QuoteDate SalesmanName Approved Ap | comment |
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| Drag a column header here to group by that column QuoteReference QuoteStatusDesc QuoteDescription Qurrency QuoteValue ExchangeRate TasRate QuoteDete SalesmanName Approved Approved | Comment |
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| Open Windows • 17 Oct 20: | |

- 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 *Print the Proposal* of.

Note: Sales Proposals can be printed in <u>any</u> Status from the *Sales Quotes list-ing* screen. If you wish to print a quote from the *Quote Maintain* screen, then the quote is required to be *saved* first.

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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