

SALES STUDIO QUOTES

INCLUDE SUBORDINATES

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

The **include subordinates** flag allows a Sales Manager to view their own quotes along with the quotes raised by their subordinates (<u>where this</u> <u>employee is set at the subordinates manager in the employee module</u>).

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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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.



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- Click on the drop-down arrow in the *Site* field to display the *Site Name* menu.
- If you are creating a <u>new</u> quote then you can continue <u>without</u> selecting the Status.
- 3. Select the *Include a Subordinate* flag to view own quotes and subordinates' quotes.

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.

MNU.168.020