

CRM BASICS

CLONE A QUOTE

- Added feature to create a copy of a quote for the same or a different customer. All quote details are copied and all line items from the original quote are included and can be edited or removed and new items can also be added.
 - If the currency of the clone is the same the user is asked whether they want to keep the same prices or update the quote with latest prices.
 - If the currency is different the prices will be automatically updated.
 - Quote copies can be linked to an existing Case.
- A full list of Quotes can be accessed from the *Home Page*, or client specific Quotes from the *Customer Page*.

Ribbon Access: Webpage > http://[servername]:[portno]/BPOCRM/User.aspx

ACCESS QUOTES FROM CUSTOMER DASHBOARD

1. Click on the *Customers* tile from the *Dashboard*.



CCM BPO2 Test Environment		Judith Mudzengi 🌣
Dashboard		Search Q
Activities for Last 30 Days	Performance	Pipeline
Description Target Existing New Custmrs Custmrs		
Nothing to display		
	0.40	Fetching data
17 Jan 2019 0 4 Today	0.00 0 0.2 0.4 0.6 0.8 1 Recent Calendar	
	Schedule Date	Status
create cold call recommendations warnings	No data to di	isplay
285 4 4 containers cases activities		
s quotes		
	©2019 CO3 Technologies (Pty) Ltd (3.5.5.1 / 3.5.5.1)	

- The *Customers* screen will be displayed.
- A list of customers will be displayed.

ດາ	BPO2 Test Environment							Judith M	1udzen	gi 🌣 🕯
Ħ	Customers								÷	Ċ)
	Type Customer name search filte	r here					c	K.		
View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
?	24 Hour HCCP	71509643	Another Person	345678		50%	New - CRM	Diamond	No	Yes
?	3Rd Generation Client-Server	71505527	Abigail Milne	031 234 567	7 abi@noname.com	75%	New - CRM		No	Yes
?	43305 Scalable	71505435				25%	Active		Yes	No
?	Adapter Holistic	71505360				25%	New - CRM		No	No
?	Adult Education Zope	71505302				25%	New - CRM		No	No
?	Advanced Feedmix	71505323				25%	New - CRM		No	No
?	Advanced Kimmel	71505324				25%	New - CRM		No	No
?	Aerospace Engineering Kubuntu	71505310				25%	New - CRM		No	No

1. Type in the customer name you wish to access quotes for in the *Search* bar.



- 2. The customer will be displayed.
- 3. Click on the *View* icon.

[C7M	BPO2 Test	Environment							Judith	Mudzer	igi 🏟
Ħ	Custome	ers								¢	• ¢
	0 →	build						Q			
View		Customer	Code	Contact	Contact phone	Contact email	Complet	Status	Rank	Active	Call Contact
? ◄	Build Construction		BUI0001	John Holland	031 456 789		66%	New - CRM	Platinum	No	Yes
Page 1 of 1	(1 items) 🤇 [1] >	[A]								Page size	: 10 🖂
				U							

- The *Customer Dashboard* screen will be displayed.
- Click on the *Quotes* tile.

CSU BPC	02 Test Environ	nment			Judith Mudzengi 🌣
📕 Cus	stomer Dash	nboard			🔂 Search 🔍
Descriptio	on Targe	for Last 30 [t Existin Custm thing to display	ig New	Performance 4.00	Pipeline Felching data
create cold call	Precommendations	A warnings	Build Construction - BU	Trading Name Build Construction Registared Name Build Construction Description VAT No 567849 Registration 567849	2 4 66% 日 2 4 ▲ 田 2 4 ▲ 1 4
customers		activities	Cruelol: 2009/10/10 5.44/13 /PF	Rank Pilatinum Webste http://www.baldconstruction.nowebsite Phone 031 455 789	
Q guetes	orders	N invoices		12 Months Sales His	tory
sredit notes	¢¢	Contracts		83 83 82 815 81	
Service calls	Reference Strategy	tine (//////////////////////////////////////	4
. bo				©2019 CO3 Technologies (Pky) Ltd (3.5.5.1 / 3.5.5.1)	TECTTOLOGIE



- The *Quotes for []* screen will be displayed.
- The selected customer's quotes will be displayed.

ustomer Code	Struction Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
Code		Quote Description	Quote Value	Currency	-	Quote Status	Overdue
0001 Buil	d Construction				-		
		Quote	2136.65	ZAR	27 Aug 2019	Customer Rejected Quote	No
0001 Buil	d Construction	Quote	21366.51	ZAR	27 Aug 2019	New Quote	No
						i age 3	
			Good Band Construction Quote	Sun construction Quice 21366.31			Page si

ACCESS QUOTES FROM THE DASHBOARD

- 1. Click on the *Quotes* tile from the *Dashboard*.
- 2. This shows the number of quotes.

CCM BPO2 Test Environment		Judith Mudzengi 🍄 🕯
Dashboard	0	Search Q
	aw tmrs 0.60 0.40 0.20 0.00 0 9.2 0.4 0.5 0.8 1	Fetching data
If Jun 2019 Image: Construction of the second sec	Today Recent Calendar Schedule Date No data to display	Status (1)
	©2019 CO3 Technologies (Pty) Ltd (3.5.5.1 / 3.5.5.1)	TEO-POLOSIES

- The *Quotes* screen will be displayed.
- A list of quotes for your customers will be displayed.



	Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
2T0010358 🧷 🗖 😋 (HOP0001	Hope Works		1222.33	ZAR	15 Aug 2019	New Quote	No
QT0010257 🖉 🗗 🕥 (71500016	Adaptive Directional	Test 1	1422.21	ZAR	17 Nov 2018	Invoiced Quote	Yes
QT0010360 🖉 🗗 🥥 (HOP0001	Hope Works		1001.99	ZAR	19 Aug 2019	New Quote	No
QT0010362 🖉 🗗 🥥 (BUI0001	Build Construction	Quote	1534.36	ZAR	27 Aug 2019	New Quote	No
QT0010363 🖉 🗗 🥥 (BUI0001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	New Quote	No
T0010364 🖉 🗖 🔮 (BUI0001	Build Construction	Quote	21366.51	ZAR	27 Aug 2019	New Quote	No

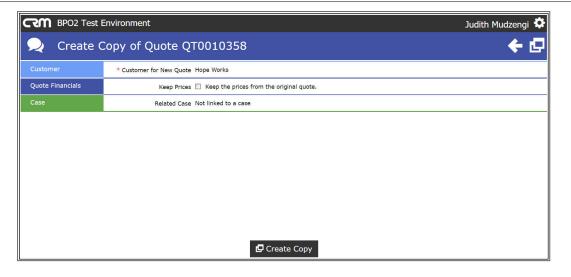
CLONE A QUOTE FROM QUOTE LISTING SCREEN

• Click on the *Create Copy of Quote icon* on the quote you wish to clone.

CCM BPO2 Test Environment Judith Mudzengi 🌣								
👤 Quotes 🗲 🗘								
Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date △	Quote Status	Overdue
QT0010358 🖉 🗗 🥝 😣	HOP0001	Hope Works		1222.33	ZAR	15 Aug 2019	New Quote	Yes
0010257 🖉 🗗 🛇 😣	71500016	Adaptive Directional	Test 1	1422.21	ZAR	17 Nov 2018	Invoiced Quote	Yes
2T0010360 🧷 🗗 📀 😣	HOP0001	Hope Works		1001.99	ZAR	19 Aug 2019	Customer Accepted Quote	Yes
QT0010363 🧷 🗗 🥝 😣	BUI0001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	Customer Rejected Quote	No
QT0010364 🖉 🗗 🥝 😣	BUI0001	Build Construction	Quote	21366.51	ZAR	27 Aug 2019	New Quote	No
Page 1 of 1 (5 items) < [1] > A							Page s	ize: 10 🗸

• The *Create Copy Quote of []* screen will be displayed.





- Customer:
 - 1. will be populated with the same customer from the original quote. This can be left as is, or
 - changed to another customer by clicking on the *drop-down arrow* and selecting an alternative customer.

CCM BPO2 Test F	Judith Mudzengi 💠	
🔎 Create C	Copy of Quote QT0010358	🗲 🗗
Customer	* Customer for New Quote Hope Works	
Quote Financials	Keep Prices 🔲 Keep the prices from the original quote.	
Case	Related Case Not linked to a case	
	🗗 Create Copy	

• *Quote Financials:* Select whether to keep the prices from the original quote, or apply the client's specific commercial pricing. For more information, refer to How The Keep Prices Option Works.



CRM BPO2 Test E	BPO2 Test Environment Judith Mudzengi						
Create Copy of Quote QT0010358							
Customer	* Customer for New Quote Hope Works						
Quote Financials	Quote Financials Keep Prices 🔲 Keep the prices from the original quote.						
Case	Related Case Not linked to a case						
	🗗 Create Copy						

- Case:
 - 1. Leave unlinked or
 - link the new quote to a case by clicking on the *drop-down arrow* and selecting the relevant case.

CRM BPO2 Test E	RM BPO2 Test Environment Judith Mudzengi 🌣						
🔎 Create C	Create Copy of Quote QT0010358						
Customer	* Customer for New Quote Hope Works						
Quote Financials	Quote Financials Keep Prices 🗌 Keep the prices from the original quote.						
Case	Related Case						
	🗗 Create Copy						

- 1. Click on either the *Create Copy* button or
- 2. Create Copy icon.



CCM BPO2 Test F	BPO2 Test Environment Judith Mudzengi						
Q Create Copy of Quote QT0010358							
Customer	* Customer for New Quote Hope Works						
Quote Financials	e Financials Keep Prices 🗌 Keep the prices from the original quote.						
Case	Case Related Case Meeting						
	Create Copy						

- The *Save Quote* screen will be displayed.
- Edit the quote as required. You can also edit line items, add new line items or remove line items.

CCM BPO2 Test	Environment												Judith Mud	lzengi 🌻
🔎 Save Qu	iote													(
+ Case		Subject	Meeting											
- Quote	* (* Customer Quote Contact ote Reference Reference	Hope Works Select REF00000 Reference	uote line items					* Site	4 Sep 2019 London Select layout				
- Quote Financials	* E	* Currency Tax Rate Exchange Rate		Rand					Quote Terms Commercial	Cash on Delive Default	ery			
- Quote Items	Quote Detail ID	Add item Item Type	• Type to Item Code	find items Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
	669	INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	197.80	197.80	197.80	0 🛍	227.47	
	670	INVN	2HS08190	SPRING ACTUATOR	1.00	0.00	0.00	0.00	865.09	865.09	865.09	0 🛍	994.85	
					2.00	0.00	0.00	0.00	1062.89	1062.89	1062.89		1222.33	
						🖹 Sa	ave							

- 1. Click on either the *Save* button or
- 2. *Save* icon.



പ്പ	BPO2 Test E	Invironment												Judith Muc	lzengi 🍄	
2	Save Qu	ote													ሩ 🗎	
+ Case			Subject Mee	eting												
- Quote		* Quot Quote I	y be created if Customer Hop e Contact John Reference REF Reference Quo comments Quo	be Works n Smith 100000 ote	line items.				* p ₁	Date 4 S * Site Lor rint Layout SA		us			2	
- Quote F	īnancials		Currency Sou Tax Rate 15. ange Rate 1.0		d				Quote Terms Cash on Delivery Commercial Default							
- Quote I	tems	Quote Detail ID	Add item 😲 Item Type	Type to find Item Code	items Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print	
			INVN	2GR05310 2HS08190	LCD Sponge A SPRING ACTUATOR	1.00	0.00	0.00	0.00	197.80 865.09	197.80 865.09	197.80 865.09	0 11 0 11	227.47 994.85		
						2.00	0.00	0.00	0.00	1062.89	1062.89	1062.89		1222.33		
						0	Save									

- A message will pop up telling you;
 - Quote saved successfully.

		Subject	Meeting											
- Quote		Il only be creat * Customer Quote Contact tote Reference Reference Comments	Hope Works John Smith QT0010368 Quote	uote line item	š.,				* Site	4 Sep 2019 London SALESQUOTE_	Marius			
- Quote Financials	*		South African 15.00000 1.0000	Rand				Quote Terms Cash on Delivery Commercial Default						
- Quote Items	Quote Detail ID	Add item Item Type	Type to Item Code	find items Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
		INVN	2GR05310 2HS08190	LCD Sponge A SPRING	1.00	0.00	0.00	0.00	197.80 865.09	197.80 865.09	197.80 865.09	0 m	227.47 994.85	
				ACTUATOR	2.00	0.00	0.00	0.00	1062.89	1062.89	1062.89		1222.33	

- To view the newly created quote, go to the **Quotes screen**.
- The new quote will be displayed in the quotes list.



旲 Quotes								<u>۰</u> . ب
Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdu
QT0010365 🧷 🗗 🛇 😣	HOP0001	Hope Works		1116.99	ZAR	03 Sep 2019	Customer Accepted Quote	No
QT0010366 🧷 🗗 🔗 🛞	HOP0001	Hope Works	1	1001.99	ZAR	03 Sep 2019	Customer Rejected Quote	No
QT0010368 🖉 🗗 🥝 😣	HOP0001	Hope Works	Quote	1222.33	ZAR	04 Sep 2019	New Quote	No
QT0010358 🖉 🗗 🥝 😣	HOP0001	Hope Works		1222.33	ZAR	15 Aug 2019	New Quote	Yes
QT0010257 🧷 🗗 🛇 🔇	71500016	Adaptive Directional	Test 1	1422.21	ZAR	17 Nov 2018	Invoiced Quote	Yes
QT0010360 🖉 🗗 🥥 😵	HOP0001	Hope Works		1001.99	ZAR	19 Aug 2019	Customer Accepted Quote	Yes
QT0010363 🧷 🗗 🔮 🛞	BUI0001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	Customer Rejected Quote	No
OT0010364 🧷 🗖 🛛 🔞	BUI0001	Build Construction	Quote	34500.00	ZAR	27 Aug 2019	New Quote	No

CLONE A QUOTE FROM QUOTE MAINTAIN SCREEN

• Either click on the *Edit Quote icon* of the quote you wish to clone.

🜙 Quc	otes	5								((,
TO010365 🧷 🛃	0	8	HOP0001	Hope Works		1116.99	ZAR	03 Sep 2019	Customer Accepted Quote	No
QT0010366 🧷 🛃	0	8	HOP0001	Hope Works		1001.99	ZAR	03 Sep 2019	Customer Rejected Quote	No
2T0010368 🖉 🖪	0	8	HOP0001	Hope Works	Quote	1222.33	ZAR	04 Sep 2019	New Quote	No
QT0010358 🖉 🖪	0	8	HOP0001	Hope Works		1222.33	ZAR	15 Aug 2019	New Quote	Yes
2T0010257 🖉 🚦	0	8	71500016	Adaptive Directional	Test 1	1422.21	ZAR	17 Nov 2018	Invoiced Quote	Yes
2T0010360 🧷 🛃	0	8	HOP0001	Hope Works		1001.99	ZAR	19 Aug 2019	Customer Accepted Quote	Yes
QT0010363 🧷 🕻	0	8	BUI0001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	Customer Rejected Quote	No
0010364 🖉 🖪	0	8	BUI0001	Build Construction	Quote	34500.00	ZAR	27 Aug 2019	New Quote	No

- The *Save Quote* screen will be displayed.
- Click on *Copy*.



		Subject	New cement	products										
- Quote	*	Il only be creat * Customer Quote Contact Jote Reference Reference Comments	Build Constru Clere Zodwa QT0010364 Quote		S.				* Site	27 Aug 2019 London SALESQUOTE				
- Quote Financials	*	 Currency South African Rand Tax Rate 15.00000 Exchange Rate 10.0000 							Quote Terms Commercial	Cash on Delive Default	ery			
- Quote Items	Quote Detail ID	Add item Item Type	Type to Item Code	find items Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
	681	INVN	2HS08110	ACTUATOR MPF	1.00	0.00	0.00	0.00	2000.00	2000.00	2000.00	0	2300.00	
	682	INVN	FS-1018MFP	FS 1018MFP	1.00	0.00	0.00	0.00	1000.00	1000.00	1000.00	0 🖻	1150.00	
					2.00	0.00	0.00	0.00	3000.00	3000.00	3000.00		3450.00	

• Or after saving a new quote, click on *Copy*.

		Subject	Meeting											
- Quote	* A quote wi	Lonly be creat	ed if you add o	uote line item										
Quote	riquote m		Hope Works											
	*	Quote Contact							Date	4 Sep 2019				
	Qu	ote Reference	OT0010368						* Site	London				
		Reference							* Print Layout	SALESQUOTE	Marius			
		Comments												
- Quote Financials		* Currency	South African	Pand				Quote Terms	Cash on Delive	80/				
		Tax Rate 15.00000												
		Exchange Rate												
		-												
 Quote Items 		Add item	😌 Type to	find items										
	Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
	687	INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	197.80	197.80	197.80	0	227.47	
	688	INVN	2HS08190	SPRING ACTUATOR	1.00	0.00	0.00	0.00	865.09	865.09	865.09	0 🖻	994.85	
					2.00	0.00	0.00	0.00	1062.89	1062.89	1062.89		1222.33	

• The Create Copy Quote of [] screen will be displayed.



CCM BPO2 Test E	Environment	Judith Mudzengi 🌣
🔎 Create C	Copy of Quote QT0010368	← 🗗
Customer	* Customer for New Quote Hope Works	
Quote Financials	Keep Prices 🔲 Keep the prices from the original quote.	
Case	Related Case Meeting	
	🗗 Create Copy	

- Customer:
 - 1. will be populated with the same customer from the original quote. This can be left as is, or
 - changed to another customer by clicking on the *drop-down arrow* and selecting an alternative customer.

CRM BPO2 Test I	Environment	Judith Mudzengi 🌣
🔎 Create C	Copy of Quote QT0010368	← 🗗
Customer	* Customer for New Quote	
Quote Financials	Keep the prices from the original quote.	
Case	Related Case Meeting	
	🗗 Create Copy	

• **Quote Financials:** Select whether to keep the prices from the original quote, or apply the client's specific commercial pricing. For more information, refer to How The Keep Prices Option Works.





- Case:
 - will be populated with the same case from the original quote. This can be left as is, or
 - can be linked to another case by clicking on the *drop-down arrow* and selecting an alternative case or
 - can be unlinked from the case by clicking on the *drop-down* arrow and selecting *Not linked to a case* option.

CCM BPO2 Test I	Environment	Judith Mudzengi 🌣
🔎 Create C	Copy of Quote QT0010368	🗲 🗗
Customer	* Customer for New Quote Hope Works	
Quote Financials	Keep Prices 🗹 Keep the prices from the original quote.	
Case	Related Case	
	Ø	
	🗗 Create Copy	

- 1. Click on either the Create Copy button or
- 2. Create Copy icon.



CRM BPO2 Test I	Environment	Judith Mudzengi 🌣
🔎 Create C	Copy of Quote QT0010368	🗲 🗗
Customer	* Customer for New Quote Hope Works	
Quote Financials	Keep Prices 🗹 Keep the prices from the original quote.	0
Case	Related Case Meeting	
	G Create Copy	

- The *Save Quote* screen will be displayed.
- Edit the quote as required. You can also edit line items, add new line items or remove line items.

CTM BPO2 Test E	Environment												Judith Muc	lzengi 🗳
🔎 Save Qu	iote													+ E
+ Case		Subject	Meeting											
- Quote		Quote Contact uote Reference Reference	Hope Works Select REF00000 Reference	quote line item					* Site	4 Sep 2019 London SALESQUOTE	Marius			
 Quote Financials 	*		South Africar 15.00000 1.0000	n Rand		Quote Terms Cash on Delivery Commercial Default								
- Quote Items	Quote Detail ID	Add item Item Type	Type to Item Code	Quote Item	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
	687	INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	197.80	197.80	197.80	0	227.47	
	688	INVN	2HS08190	SPRING ACTUATOR	1.00	0.00	0.00	0.00	865.09	865.09	865.09	0 🖻	994.85	
					2.00	0.00	0.00	0.00	1062.89	1062.89	1062.89		1222.33	

- 1. Click on either the Save button or
- 2. Save icon.



		Subject	Meeting											
Quote	· · · · ·	II only be creat * Customer Quote Contact	Hope Works	quote line item	IS.				Date	4 Sep 2019				
		Jote Reference								London				
				uested produc	ts				* Print Layout	SALESQUOTE_	Marius			
		Comments	Quote for rec	uested produc	ts									
Quote Financials		* Currency	South Africa	Rand					Quote Terms	Cash on Delive	ery			
		Tax Rate	15.00000						Commercial					
	*1	Exchange Rate	1.0000											
- Quote Items		Add item	😌 Type b	find items										
	Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppre on Prin
	687	INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	197.80	197.80	197.80	0 🛍	227.47	
	688	INVN	2HS08190	SPRING ACTUATOR	1.00	0.00	0.00	0.00	865.09	865.09	865.09	0 🛍	994.85	
					2.00	0.00	0.00	0.00	1062.89	1062.89	1062.89		1222.33	

- A message will pop up telling you;
 - Quote saved successfully.

		Subject Meet	ing											
- Quote	* Quote Quote Re Re	ustomer Hope Contact John ference QT00 ference Quot	Works Smith	d products				* Prir	Date 4 Se * Site Lond It Layout SALE		1			
- Quote Financials	1	Currency Sout Tax Rate 15.0 ge Rate 1.00							te Terms Cash mmercial Defa					
- Quote Items	A Quote Detail ID	dd item 😲 Item Type	Type to find i Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
		INVN INVN	2GR05310 2HS08190	LCD Sponge A SPRING ACTUATOR	1.00	0.00	0.00	0.00	197.80 865.09	197.80 865.09	197.80 865.09	0 m 0 m	227.47 994.85	
					2.00	0.00	0.00	0.00	1062.89	1062.89	1062.89		1222.33	

- To view the newly created quote, go to the **Quotes screen**.
- The new quote will be displayed in the quotes list.



la Quotes							F C
Quote Ref Custom Code		Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdu
0010365 🧷 🗗 🕥 😣 HOP0001	Hope Works		1116.99	ZAR	03 Sep 2019	Customer Accepted Quote	No
0010366 🖉 🗗 🤡 🙁 HOP0001	Hope Works	,	1001.99	ZAR	03 Sep 2019	Customer Rejected Quote	No
0010368 🧷 📮 🛇 😢 HOP0001	Hope Works	Quote	1222.33	ZAR	04 Sep 2019	New Quote	No
0010369 🧷 📮 🛇 😣 HOP0001	Hope Works	Quote for requested products	1222.33	ZAR	04 Sep 2019	New Quote	No
0010358 🧷 📮 🛇 😢 HOP0001	Hope Works		1222.33	ZAR	15 Aug 2019	New Quote	Yes
71500010	5 Adaptive Directional	Test 1	1422.21	ZAR	17 Nov 2018	Invoiced Quote	Yes
0010360 🖉 🗗 🎯 🔇 HOP0001	Hope Works		1001.99	ZAR	19 Aug 2019	Customer Accepted Quote	Yes
0010363 🖉 📮 🤡 💿 BUI0001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	Customer Rejected Quote	No
0010364 🧷 🗗 🛛 😣 BUI0001	Build Construction	Quote	34500.00	ZAR	27 Aug 2019	New Quote	No

KEEP PRICES OPTION

This section only covers different scenarios of how the *Keep Prices* option works. For the full process on how to clone a quote, refer to Clone A Quote From The Quote Listing Screen and or Clone A Quote From The Quote Maintain Screen.

COPY A QUOTE: DIFFERENT COMMERCIAL FROM ORIGINAL QUOTE

- In the examples below,
 - 1. the quote that will be cloned is for *Hope Works*,
 - 2. has *Default* commercial and
 - 3. the line items prices are *197.80* and *865.09* respectively.



+ Case			Meeting											
- Quote	* Q	only be create * Customer uote Contact te Reference Reference	ed if you add q Hope Works John Smith QT0010369 Quote for requ	uote line items.					* Site	4 Sep 2019 London SALESQUOTE_1	Marius			
- Quote Financials	* Ex		South African 15.00000 1.0000	Rand					Quote Terms Commercial	Cash on Deliver Default	Ŷ			
- Quote Items	Quote Detail ID	Add item Item Type	Type to Item Code	find items Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
	689	INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	197.80	197.80	197.80	0	227.47	
	690	INVN	2HS08190	SPRING ACTUATOR	1.00	0.00	0.00	0.00	865.09	865.09	865.09	0	994.85	

• Click on *Copy*.

പ്പ	BPO2 Test I	Environment												Judith Muc	lzengi 🌣
Q	Save Qu	iote													← 🖹
+ Case			Subject	Meeting											
- Quote		* c	* Customer Juote Contact ote Reference Reference	Hope Works John Smith QT0010369 Quote for requ	uote line items.					* Site	4 Sep 2019 London SALESQUOTE_	1arius			
- Quote F	inancials	* E		South African 15.00000 1.0000	Rand					Quote Terms Commercial	Cash on Delive Default	ð			
- Quote I	tems		Add item	C Type to	find items										
		Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
		689	INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	197.80	197.80	197.80	0 🖻	227.47	
		690	INVN	2HS08190	SPRING	1.00	0.00	0.00	0.00	865.09	865.09	865.09	0 🖿	994.85	
						2.00	0.00	0.00	0.00	1062.89	1062.89	1062.89		1222.33	
	甸	Delete				View			8	Save			Ø	Сору	

• The *Create Copy of Quote []* screen will be displayed.



CRM BPO2 Test E	invironment	Judith Mudzengi 🌣
🔎 Create C	copy of Quote	← 🗗
Customer	* Customer for New Quote Hope Works	
Quote Financials	Keep Prices \square Keep the prices from the original quote.	
Case	Related Case Meeting	
	Create Copy	

DO NOT KEEP PRICES FIXED OPTION

- 1. A different customer has been selected and
- 2. the *Keep Prices* check box has not been ticked.
 - This means the prices from the original quote will not be maintained unless the selected customer has the same commercial and or same item prices as the original customer.
- 3. Click on *Create Copy*.

CCM BPO2 Test B	Invironment	Judith Mudzengi 🌣
🔎 Create C	Copy of Quote	← 🗗
Customer	* Customer for New Quote JIRA Networked	
Quote Financials	Keep Prices 🔲 Keep the prices from the original quote. 🗕 🛛 🖉	
Case	Related Case Not linked to a case	
	3	



- The *Save Quote* screen will be displayed.
 - 1. The customer on the new quote is different from the original customer (whose quote was cloned) and has
 - 2. a different commercial (*AbigailM*) from the original customer (whose quote was cloned)
 - therefore the line items prices have changed to those of *Abi-gailM* commercial since the option to keep prices of the original quote was not selected.
 - The prices are now **148.35** and **648.82** respectively.

CCM BPO2 Test	Environment												Judith Mud	dzengi 🌻
🔎 Save Qi	lote													← 🗄
+ Case		Subject	No case linked											
- Quote	* Q	* Customer uote Contact te Reference Reference	JIRA Networke Select REF00000 Reference	lating to the qu	ote			0	* Site	4 Sep 2019 London SALESQUOTE_M	larius			
- Quote Financials	* 6	* Currency Tax Rate cchange Rate		Rand					Quote Terms Commercial	Cash on Deliver AbigailM 🗲	ý - 0			
- Quote Items	Quote Detail ID	Add item Item Type	• Type to Item Code	Quote Item	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
		INVN	2GR05310	LCD Sponge	1.00	0.00	0.00	0.00	148.35	148.35	148.35	0	170.61	
	690	INVN	2HS08190	SPRING ACTUATOR	1.00	0.00	0.00	3 0.00	648.82	648.82	648.82	0	746.14	
					2.00	0.00	0.00	0.00	797.17	797.17	797.17		916.75	

KEEP PRICES FIXED OPTION

- 1. A different customer has been selected and
- 2. the *Keep Prices* check box has been ticked.
 - This means the prices of the original quote will be maintained even if the selected customer has a different commercial (prices) from the original customer.
- 3. Click on *Create Copy*.



CRM BPO2 Test B	Environment	Judith Mudzengi 🌣
🔎 Create C	Copy of Quote	← 🗗
Customer	* Customer for New Quote JIRA Networked	
Quote Financials	Keep Prices 🗹 Keep the prices from the original quote. 🗕 🖉	
Case	Related Case Not linked to a case	
	3→→ Create Copy	

- 1. The customer on the new quote is different from the original customer (whose quote was cloned) and has
- 2. a different commercial (*AbigailM*) from the original customer (whose quote was cloned)
- 3. but the line items prices are the same as of the original quote although the commercial is different.
 - This is because the option to keep prices from the original quote was selected. The prices are *197.80* and *865.09* respectively.



+ Case		Subject N	lo case linked											
• Quote	• Qu	Customer J ote Contact S Reference Reference	IRA Networked elect EF00000 eference						Date 6 • Site L Print Layout S					
• Quote Financials	* Exi	Currency S Tax Rate 1 hange Rate 1		and					Quote Terms C Commercial		-2			
- Quote Items		Add item 🔇	Type to fi	nd items					21					
	Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
	687	INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	197.80	197.80	197.80	01	227.47	
			2HS08190	SPRING	1.00	0.00	0.00	3 0.00	865.09	865.09	865.09	0	994.85	
	688	INVN	20209130	ACTUATOR										

COPY A QUOTE: SAME COMMERCIAL AND EDITED LINE ITEM PRICES

- In this image, the quote whose line item prices will be altered is for
 - 1. Hope Works,
 - 2. the commercial is *Default*,
 - the line items prices pulling from the *Default* commercial are *197.80* and *865.09* respectively but they will be edited below.



Save Quote													
+													← 🖪
+ Case	Subject	Meeting											
	will only be creat * Customer * Quote Contact Quote Reference Reference Comments	Hope Works John Smith QT0010368 Quote		s.				* Site	4 Sep 2019 London SALESQUOTE_	Marius			
- Quote Financials		South Africar 15.00000 1.0000	ı Rand					Quote Terms Commercial	Cash on Delive Default	-7 2			
- Quote Items Quote Detail II	Add item Item Type	• Type to Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
68	7 INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	197.80	197.80	197.80	0 📾	227.47	
68	8 INVN	2HS08190	SPRING	1.00	0.00	0.00	3 0.00	865.09	865.09	865.09	0 🛍	994.85	
				2.00	0.00	0.00	0.00	1062.89	1062.89	1062.89		1222.33	

- 1. The quote line item prices have been edited to *300* and *1000* respectively.
- 2. The commercial has not been changed.
- 3. The changes have been saved.
 - *Note:* The edited quote will be referred to as the original quote.

+ Case		Subject	Meeting				,							
- Quote		Il only be creat * Customer Quote Contact	Hope Works	uote line item	s.				Date	4 Sep 2019				
		iote Reference								London				
		Reference							* Print Layout	SALESQUOTE_	Marius			
		Comments	Quote											
• Quote Financials		* Currency	South African	Rand					Quote Terms	Cash on Delive	ry			
		Tax Rate	15.00000						Commercial	Default 🔫	-0			
	* (Exchange Rate	1.0000											
- Quote Items		Add item	Type to	find items										
	Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
	687	INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	300.00	300.00	300.00	0 🖻	345.00	
	688	INVN	2HS08190	SPRING ACTUATOR	1.00	0.00	0.00	0.00	1000.00	1000.00	1000.00	0 🖻	1150.00	
					2.00	0.00	0.00	0.00	1300.00	1300.00	1300.00		1495.00	

• Click on *Copy* to clone the edited quote.



旲 Save Q	uote													- 🗲 [
+ Case		Subject	Meeting											
- Quote	*	Il only be creat * Customer Quote Contact Jote Reference Reference Comments	Hope Works John Smith QT0010368 Quote	uote line item	s.				* Site	4 Sep 2019 London SALESQUOTE	_Marius			
- Quote Financials	*		South African 15.00000 1.0000	Rand					Quote Terms Commercial	Cash on Deliv Default	ery			
- Quote Items	Add item 📀 Type to find items													
	Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
	687	INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	300.00	300.00	300.00	0 🖻	345.00	
	688	INVN	2HS08190	SPRING ACTUATOR	1.00	0.00	0.00	0.00	1000.00	1000.00	1000.00	0 🛍	1150.00	
					2.00	0.00	0.00	0.00	1300.00	1300.00	1300.00		1495.00	

• The *Create Copy of Quote []* screen is displayed.

CRM BPO2 Test E	Environment	Judith Mudzengi 🌣
CCM BPO2 Test B	Copy of Quote	← 🗗
Customer	* Customer for New Quote Hope Works	
Quote Financials Case	Keep Prices 🔲 Keep the prices from the original quote.	
Case	Related Case Meeting	
	🗗 Create Copy	

DO NOT KEEP PRICES FIXED OPTION

- 1. The same customer has been selected and
- 2. the *Keep Prices* check box has not been ticked.
 - This means the prices from the original quote will not be maintained unless the selected customer has the same commercial and or same item prices as the original customer.
- 3. Click on *Create Copy*.



CRM BPO2 Test I	Environment	Judith Mudzengi 🌣
🔎 Create C	Copy of Quote QT0010368	€ 🗗
Customer	* Customer for New Quote Hope Works	
Quote Financials	Keep Prices 🔲 Keep the prices from the original quote. 🗕 📿 🛛 🖉	
Case	Related Case Not linked to a case	
	🗗 Create Copy \prec 🛶 🕄	

- 1. The customer on the new quote is the same as the customer on the original quote and has
- 2. the same commercial (*Default*) as the original quote.
- 3. but the line items prices (**197.80** and **865.09**) reflected in the new quote are different from the original quote although the commercial and the customer are the same.
 - This is because
 - the line item prices from the original quote were edited and
 - the option to *Keep Prices* of the original quote was not selected.



CRM BPO2 Test	Environment												Judith Muc	lzengi 🕻
🔎 Save Qu	uote													(🗄
+ Case		Subject	No case linke	đ										
- Quote	• (* Customer Quote Contact ote Reference Reference	Hope Works Select REF00000 Reference	elating to the qu					* Site	6 Sep 2019 London Select layout				
- Quote Financials	×E	* Currency Tax Rate xchange Rate		Rand				Quote Terms Cash on Delivery Commercial Default						
- Quote Items		Add item	Type to	find items										
	Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
	687	INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	197.80	197.80	197.80	0 🛍	227.47	
	688	INVN	2HS08190	SPRING	1.00	0.00	0.00	3 <u>0.00</u>	865.09	865.09	865.09	0 🖿	994.85	
					2.00	0.00	0.00	0.00	1062.89	1062.89	1062.89		1222.33	

KEEP PRICES FIXED OPTION

- 1. The same customer has been selected and
- 2. the *Keep Prices* check box has been ticked.
 - This means the prices of the original quote will be maintained.
- 3. Click on *Create Copy*.

CCM BPO2 Test I	Environment	Judith Mudzengi 🌣
🔎 Create C	Copy of Quote QT0010368	← 🗗
Customer	* Customer for New Quote Hope Works	
Quote Financials	Keep Prices 🕢 Keep the prices from the original quote, 🔫 📿 2	
Case	Related Case Not linked to a case	
	3	

1. The customer on the new quote is the same as the customer on the original quote and has



- 2. the same commercial (*Default*) as the original quote.
- and the line items prices are the same (300 and 1000) as of the original quote although they are not the prices set on the customer commercial (Default).
 - This is because
 - the line item prices of the original quote were edited
 - and *Keep Prices* of the original quote option was selected.

🔎 Save Q	uote													← 🗄
+ Case		Subject	No case linked	E.										
- Quote	* Q	* Customer uote Contact ite Reference Reference	Hope Works • Select REF00000 Reference	uote line items.	ote			8	* Site	6 Sep 2019 London SALESQUOTE_M	larius			
- Quote Financials	* B		South African 15.00000 1.0000	Rand					Quote Terms Commercial	Cash on Deliver Default	2			
- Quote Items	Quote Detail ID	Add item Item Type	Type to Item Code	find items Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
	687	INVN	2GR05310	LCD Sponge	1.00	0.00	0.00	0.00	300.00	300.00	300.00	0 🖻	345.00	
	688	INVN	2HS08190	SPRING ACTUATOR	1.00	0.00	0.00	3 0.00	1000.00	1000.00	1000.00	0	1150.00	
					2.00	0.00	0.00	0.00	1300.00	1300.00	1300.00		1495.00	

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