SALES STUDIO QUOTES

ADD NOTES

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 Notes*** 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*

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.

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 link ***Notes*** to.

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

Note 2: Only quotes in Status: '***New Quote***' or '***Salesman Released Quote***' can have Notes added to them. However, if you Save a Copy of a quote, then the copy can have Notes added to it.

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 Using BPO Data Grids and Data Grid Filtering for further information regarding data grid functionality that can be utilised here.

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