

# SALES STUDIO QUOTES

## ADD FILES AND BROCHURES

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 Files and Brochures** 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

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**Ribbon Access:** *Sales Studio > Sales > Quotes*

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## SELECT THE SITE AND STATUS

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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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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 **Files and Brochures** to.

**Note 1:** If you are *creating a new quote*, you do not need to select the **Status**. If you are adding Files and Brochures 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 Files and Brochures added to them.

### **GENERAL BPO2 INTERFACE FUNCTIONALITY**

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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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