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*

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 *Print the Proposal* of.

Note: Sales Proposals can be printed in <u>any</u> Status from the *Sales Quotes listing* 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 Using BPO Data Grids and Data Grid Filtering for further information regarding data grid functionality that can be utilised here.

MNU.168.018