

# SALES STUDIO QUOTES

## SAVE (CLONE) COPY OF A QUOTE

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 **Save a Copy of an Existing Quote**.

### 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

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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.



### SELECT THE SITE

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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 site that contains the particular quote that you wish to *copy*.

## **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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