

We are currently updating our site; thank you for your patience.

CRM BASICS

QUOTES (SALESMAN-SPECIFIC)

A full list of **New** , **Accepted** and **Rejected** quotes for all customers on the system, where you are the Salesman, can be accessed from the **Dashboard** (Home Page) as set out below.

Customer-specific Quotes can be accessed from the **Customer Dashboard** (Customer Page).

Adding Quotes in **CRM** , will also create the quote in **BPO** as a New Quote. This Quote needs to be emailed to the client. The email include links to either:

- **'Accept'** or
- **'Reject'** the Quote,
- or to have the salesman **'Contact Me'**

Once **'Accepted'** a Quote can no longer be edited.

Quotes can be added when

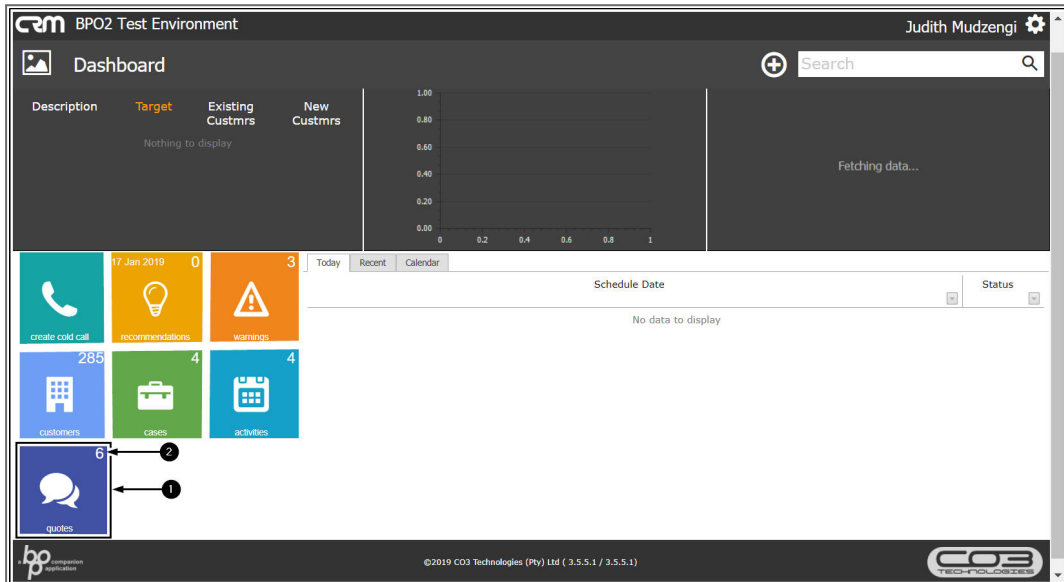
- creating a new Case or
- editing a Case
- adding or editing an Activity
- or from the Case and Activity lists.

You can **view, edit, print and delete Quotes** for your Customers in CRM.

Access: Webpage > [http://\[servername\]:\[portno\]/BPOCRM/User.aspx](http://[servername]:[portno]/BPOCRM/User.aspx)

ACCESS ALL QUOTES FROM THE DASHBOARD

1. Click on the **Quotes** tile from the **Dashboard** .
2. The number in the top right of this tile shows the total number of **New** , **Accepted** and **Rejected** Quotes (for all customers) that are linked to you as the Salesman.



- The **Quotes** listing page will open.
- A list of **New** , **Accepted** and **Rejected** quotes for all customers on the system, where you are the Salesman, will be displayed.

CRM 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	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	BU10001	Build Construction	Quote	1534.36	ZAR	27 Aug 2019	New Quote	No
QT0010363	BU10001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	New Quote	No
QT0010364	BU10001	Build Construction	Quote	21366.51	ZAR	27 Aug 2019	New Quote	No

Page 1 of 1 (6 items) Page size: 10

PRINT / EMAIL QUOTE

- Click on the **Quote Number** you wish to **Print / Email**.

CRM 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	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	BU10001	Build Construction	Quote	1534.36	ZAR	27 Aug 2019	New Quote	No
QT0010363	BU10001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	New Quote	No
QT0010364	BU10001	Build Construction	Quote	21366.51	ZAR	27 Aug 2019	New Quote	No

Page 1 of 1 (6 items) Page size: 10

- The **Report Viewer and Emailer** screen will be displayed.
- The selected quote will be displayed.
 - You can download the quote and or
 - print the quote.

CRM BPO2 Test Environment
Judith Mudzengi

Report Viewer and Emailer

+ Email Document
SALESQUOTE
2 / 2

Sales Quote
BPO2 Test Environment

1 Smith Street
Morningside
Durban
South Africa
4000
Reg No.: 111 222 333
VAT No.: 453 212 5566

1 Smith Street
Morningside
Durban
South Africa
4000
Fax No.: 0866 212 4455
Tel No.: 031 555 9873

Document Ref.: QT0010358
Date: 15 Aug 2019
Sales Person: Judith Mudzengi
Serial No.:
Model No.:
Contract No.:

Status: New Quote
Reference:

Attention: John Smith
Customer: HOP0001 - Hope Works
Tel No.: 031 123 4567
Fax No.:
Email: john@email.co.za
VAT No.:

Billing Address:

Repayment Terms: Cash on Delivery **Repayment Amount:** ZAR **1,062.89**

Item Code	Item Description	Quantity	Unit Price	Discount %	Net Price	Total
2GR05310	LCD Sponge A	1.00	197.80	0.00	197.80	227.47
2HS08190	SPRING ACTUATOR	1.00	865.09	0.00	865.09	994.85

Goods remains the property of 101 Equipment (Pty) Ltd until paid in full		Sub Total	ZAR	1,062.89
		VAT	ZAR	159.43
		Total	ZAR	1,222.33

<hr/>	<hr/>	<hr/>	<hr/>
Receiving Signature	Print Name	Date	Time

Payments Details : Bank: Standard Bank Branch: Standard Bank Acc Name: 101 Equipment Acc No.: 555 66 77 88 Sort Code: 020909
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1

2

+

+

-

- To email the quote, click on the [+] sign in the **Email Document** section.

CRM BPO2 Test Environment
Judith Mudzengi

Report Viewer and Emailer

+ Email Document

Sales Quote
BPO2 Test Environment

1 Smith Street Morningside Durban South Africa 4000	1 Smith Street Morningside Durban South Africa 4000
Reg No.: 111 222 333	Fax No.: 0866 212 4455
VAT No.: 453 212 5566	Tel No.: 031 555 9873

Document Ref.: QT0010358
Date: 15 Aug 2019
Sales Person: Judith Mudzengi
Serial No.: 1
Model No.:
Contract No.:

Status: New Quote	Reference:
Attention: John Smith	Billing Address:
Customer: HOP0001 - Hope Works	
Tel No.: 031 123 4567	
Fax No.:	
Email: john@email.co.za	
VAT No.:	

Repayment Terms: Cash on Delivery	Repayment Amount: ZAR	1,062.89
--	------------------------------	-----------------

Item Code	Item Description	Quantity	Unit Price	Discount %	Net Price	Total
2GR05310	LCD Sponge A	1.00	197.80	0.00	197.80	227.47
2HS08190	SPRING ACTUATOR	1.00	865.09	0.00	865.09	994.85

Goods remains the property of 101 Equipment (Pty) Ltd until paid in full	Sub Total	ZAR	1,062.89
	VAT	ZAR	159.43
	Total	ZAR	1,222.33

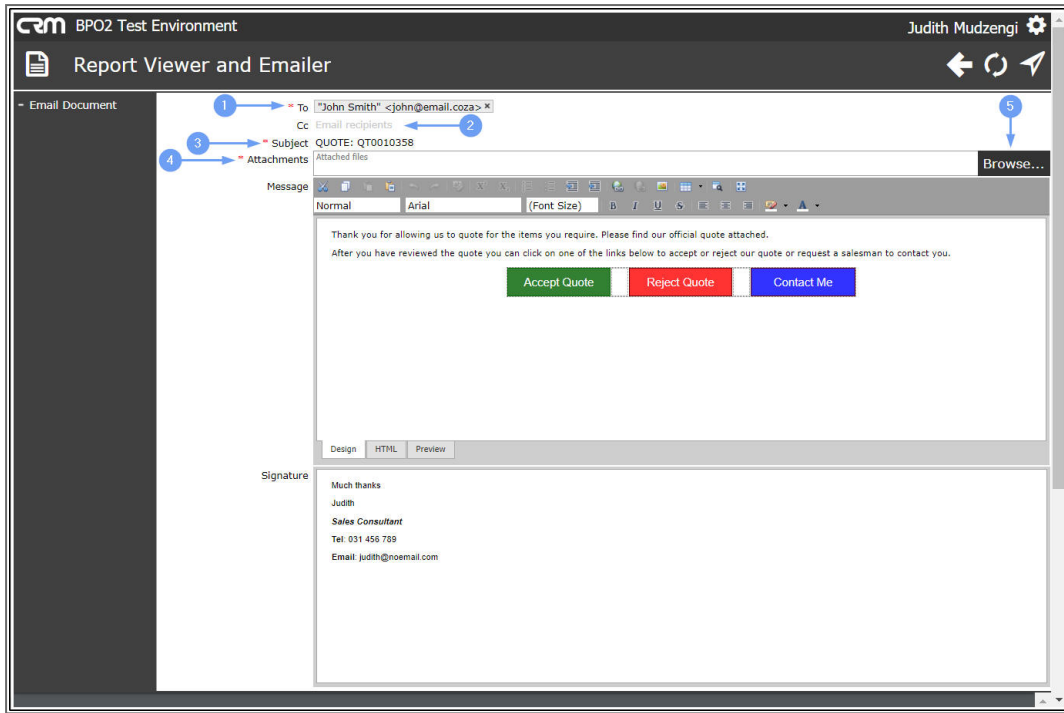
Receiving Signature	Print Name	Date	Time
---------------------	------------	------	------

Payments Details : Bank: Standard Bank Branch: Standard Bank Acc Name: 101 Equipment Acc No.: 555 66 77 88 Sort Code: 020909

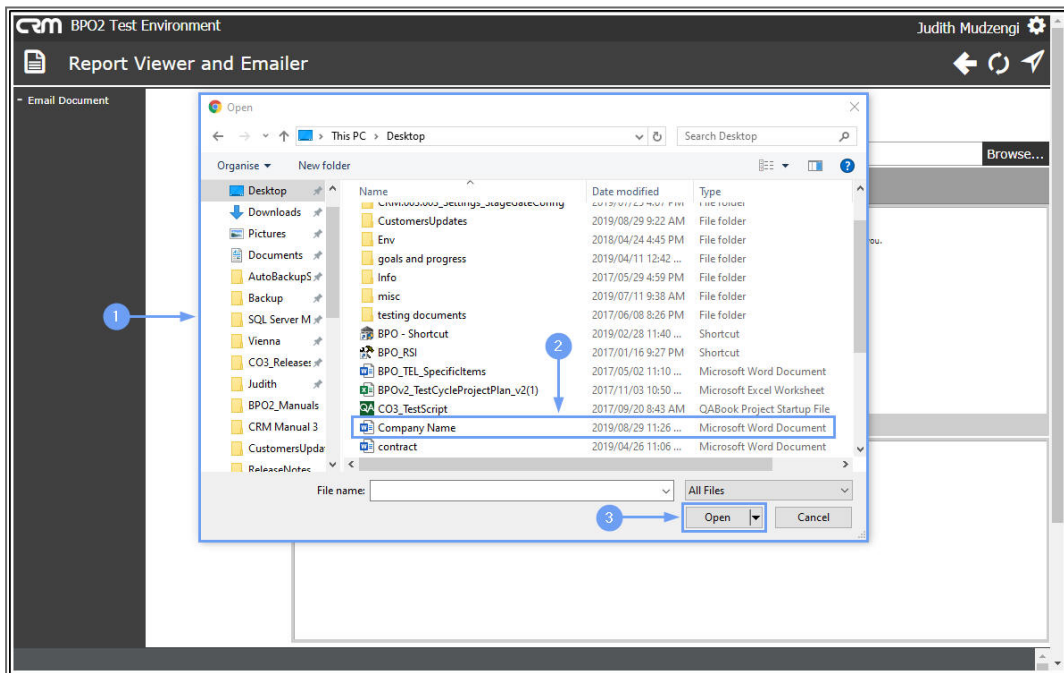
Report created on BPO - www.co3.co.za Printed : 29 Aug 2019 09:02 Page 2 of 2

The **Email Document** section will be expanded.

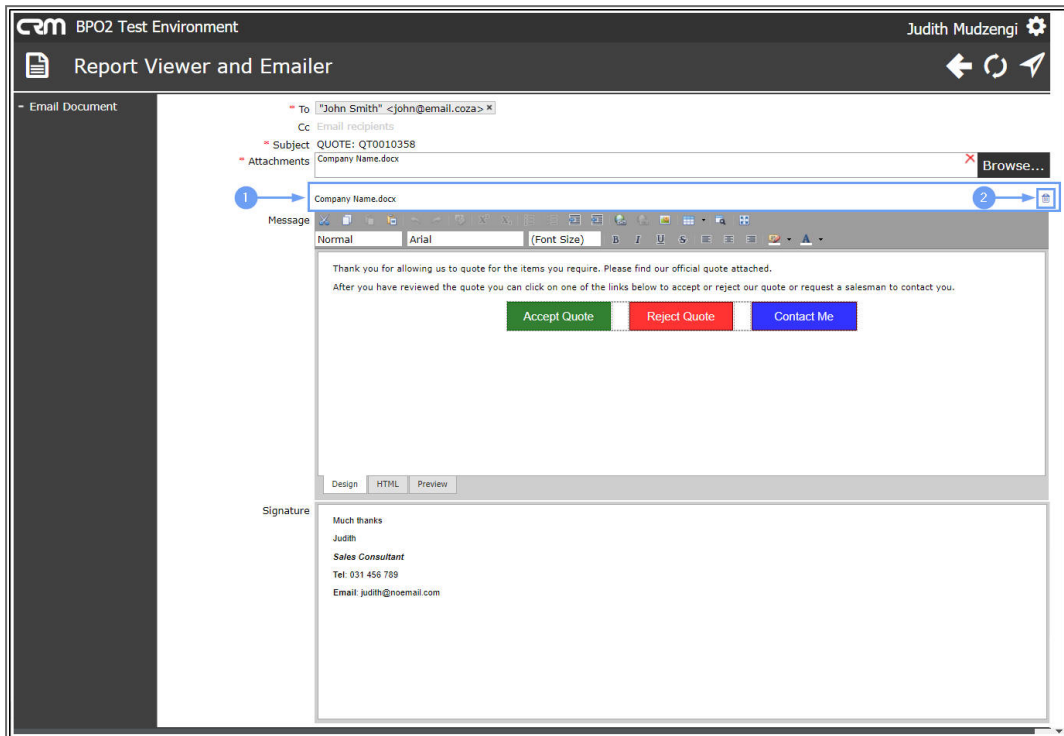
1. **To:** This field will auto populate with the CRM contact for the case but you can change this if applicable.
2. **Cc:** In this field, you can add other email recipients if applicable.
3. **Subject:** This field will auto populate with the selected quote number but you can edit this if applicable.
4. **Attachments:** You can add other documents as attachments if required.
5. To add an attachment, click on **Browse** .



1. The **Open** screen will pop up.
2. Search for and select the file you wish to link.
3. Click on **Open** .

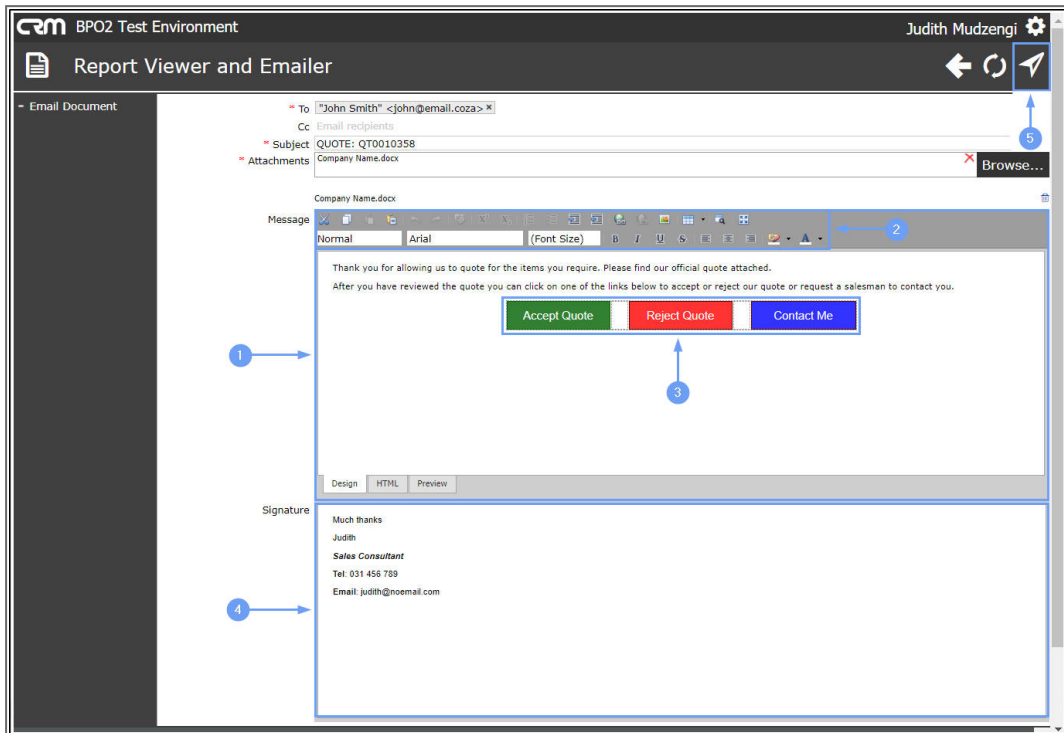


1. The file will now be attached to the email.
2. You can delete the attachment if required by clicking on the **Delete** icon.



1. The **message body** may auto populate but you can edit this. Type in the relevant details in the message body.
2. You can use the **tool bar** to customize your email message.
3. The email body has a link that allows the recipient to:
 - **Accept Quote** : The quote will automatically be **marked as accepted** in the **Quotes / Quotes for []** screen when the recipient clicks on **Accept Quote** .
 - **Reject Quote** : The quote will automatically be **marked as rejected** in the **Quotes / Quotes for []** screen when the recipient clicks on **Reject Quote** .
 - **Contact (You)**

- The **Signature** will auto populate depending on your **personal email settings** or the **default email settings**.
- When you are done, click on the **Send** icon.



- A message will pop up telling you the status of the sent email.
- Click on **Back**.

Email saved to queue.

Report Viewer and Emailer

+ Email Document

Sales Quote
BPO2 Test Environment

1 Smith Street 1 Smith Street
Morningside Morningside
Durban Durban
South Africa South Africa
4000 4000
Reg No.: 111 222 333 Fax No.: 0866 212 4455
VAT No.: 453 212 5566 Tel No.: 031 555 9873

Status : New Quote
Reference :
Attention: John Smith
Customer : HOP0001 - Hope Works
Tel No. : 031 123 4567
Fax No. :
Email : john@email.co.za
VAT No. :

Document Ref.: QT0010358
Date : 15 Aug 2019
Sales Person : Judith Mudzengi
Serial No. :
Model No. :
Contract No. :
Billing Address :

Repayment Terms :		Cash on Delivery		Repayment Amount :		ZAR	1062.89
Item Code	Item Description	Quantity	Unit Price	Discount %	Net Price	Total	
2GR05310	LCD Sponge A	1.00	197.80	0.00	197.80	227.47	
2HS08190	SPRING ACTUATOR	1.00	865.09	0.00	865.09	994.85	

Goods remains the property of 101 Equipment (Pty) Ltd until paid in full	Sub Total	ZAR	1062.89
	VAT	ZAR	159.43
	Total	ZAR	1222.33

Receiving Signature	Print Name	Date	Time
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Payments Details : Bank: Standard Bank Branch: Standard Bank Acc Name: 101 Equipment Acc No.: 555 66 77 88 Sort Code: 020909

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- You will return to the **Quotes** listing page.

CRM 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	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	
QT0010364	BUI0001	Build Construction	Quote	21366.51	ZAR	27 Aug 2019	New Quote	No	

Page 1 of 1 (6 items) [1] Page size: 10

View / Edit / Delete Quote

- Click on the **Edit icon** of the quote you wish to **view / edit / delete**.

CRM 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	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	
QT0010363	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	
QT0010364	BUI0001	Build Construction	Quote	21366.51	ZAR	27 Aug 2019	New Quote	No	

Page 1 of 1 (6 items) [1] Page size: 10

The **Save Quote** screen will be displayed.

1. Click on the [+] sign to **expand** the frame to view more details or click on the [-] sign to **collapse** the frame to view less details.

The screenshot shows a CRM interface with a 'Save Quote' form. The 'Quote' section is collapsed, indicated by a minus sign and a small '1' in a red circle. The form includes fields for Customer (Build Construction), Quote Contact (Clere Zodia), Date (27 Aug 2019), and Site (London). Below this, there are sections for Quote Financials (Currency: South African Rand, Tax Rate: 15.00000, Exchange Rate: 1.0000) and Quote Items. The Quote Items table is expanded and contains the following data:

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
677	INVN	FS-1016MFP	FS 1016MFP	1.00	0.00	0.00	0.00	202.45	202.45	202.45		232.81	
678	INVN	2HS08110	ACTUATOR MPF	1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	
				2.00	0.00	0.00	0.00	1334.22	1334.22	1334.22		1534.36	

At the bottom of the form, there are buttons for Delete, View, Save, and Copy.

View Quote

- Click on **View**.

The screenshot shows the same CRM interface, but the 'Quote' section is now expanded, showing more details such as Quote Contact (John Holland) and Quote Reference (QT0010362). A blue arrow points to the 'View' button at the bottom of the form.


The **Report Viewer and Emailer** screen will be displayed.

1. You can now view the Sales Quote.
2. Click on **Back**.

CRM BPO2 Test Environment Judith Mudzengi

Report Viewer and Emailer

+ Email Document



Sales Quote
BPO2 Test Environment

1 Smith Street
Morningside
Durban
South Africa
4000
Reg No.: 111 222 333 Fax No.: 0866 212 4455
VAT No.: 453 212 5566 Tel No.: 031 555 9873

Document Ref.: QT0010362
Date: 27 Aug 2019
Sales Person: Judith Mudzengi
Serial No.:
Model No.:
Contract No.:

Status: New Quote
Reference: Quote

Attention: John Holland
Customer: BUD001 - Build Construction
Tel No.: 031 456 789
Fax No.:
Email:
VAT No.: 567849

Billing Address: 3 Colinton Road
Gillies
Upper Highway
3610
RSA

Repayment Terms: Cash on Delivery **Repayment Amount:** ZAR **1334.22**

Item Code	Item Description	Quantity	Unit Price	Discount %	Net Price	Total
FS-1016MFP	FS 1016MFP	1.00	202.45	0.00	202.45	232.81
2HS08110	ACTUATOR MPF	1.00	1131.78	0.00	1131.78	1301.54

Goods remains the property of 101 Equipment (Pty) Ltd until paid in full - Quote		Sub Total	ZAR	1334.22
		VAT	ZAR	200.13
		Total	ZAR	1534.36

Receiving Signature	Print Name	Date	Time
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Payments Details : Bank : Standard Bank Branch: Standard Bank Acc Name: 101 Equipment Acc No.: 555 66 77 88 Sort Code: 020909
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• You will return to the **Save Quote** screen.

CRM BPO2 Test Environment Judith Mudzengi

Save Quote

Case Customer: Build Construction
Contact: Clere Zodwa
Subject: New cement products
Case Information: New cement products

Quote * A quote will only be created if you add quote line items.
* Customer: Build Construction
* Quote Contract: John Holland
Quote Reference: QT0010362
Reference: Quote
Comments: Quote
Date: 27 Aug 2019
* Site: London
* Print Layout: SALESQUOTE

Quote Financials * Currency: South African Rand
Tax Rate: 15.00000
* Exchange Rate: 1.0000
Quote Terms: Cash on Delivery
Commercial: Default

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
677	INVN	FS-1016MFP	FS 1016MFP	1.00	0.00	0.00	0.00	202.45	202.45	202.45		232.81	
678	INVN	2HS08110	ACTUATOR MPF	1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	
				2.00	0.00	0.00	0.00	1334.22	1334.22	1334.22		1534.36	

Delete
View
Save
Copy

Edit Quote

Case Frame

- **Customer:** The customer will auto populate and this field cannot be edited.
- **Contact:** The contact will auto populate and this field cannot be edited.
- **Subject:** The subject will auto populate and this field cannot be edited.
- **Case Information:** The case information will auto populate and this field cannot be edited.

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
677	INVN	FS-1016MFP	FS 1016MFP	1.00	0.00	0.00	0.00	202.45	202.45	202.45		232.81	
678	INVN	ZHS08110	ACTUATOR MPF	1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	
				2.00	0.00	0.00	0.00	1334.22	1334.22	1334.22		1534.36	

Quote Frame

- **Customer:** The customer will auto populate. This field cannot be edited.
- **Quote Contact:** The quote contact will auto populate.

- To change the quote contact, click on the **drop-down arrow** and select an alternative contact, if applicable.
- **Quote Reference:** This quote reference will auto populate with the quote number. This field cannot be edited.
- **Reference:** The reference will auto populate but you can edit this, if applicable.
- **Comments:** The comments will auto populate but you can edit this, if applicable.
- **Date :** The date will auto populate.
 - To change the date, click on the **drop-down arrow** and select an alternative date if applicable.
- **Site:** The site will auto populate. This field cannot be edited.
- **Print Layout :** The print layout will auto populate.
 - To change this, click on the **drop-down arrow** and select an alternative layout, if applicable.

CRM BPO2 Test Environment Judith Mudzengi

Save Quote

Case
 Customer: Build Construction
 Contact: Clere Zodwa
 Subject: New cement products
 Case Information: New cement products

Quote
 * A quote will only be created if you add quote line items.
 * Customer: Build Construction
 * Quote Contact: John Holland
 Quote Reference: QT0010362
 Reference: Quote
 Comments: Quote
 Date: 27 Aug 2019
 * Site: London
 * Print Layout: SALESQUOTE

Quote Financials
 * Currency: South African Rand
 Tax Rate: 15.00000
 Exchange Rate: 1.0000
 Quote Terms: Cash on Delivery
 Commercial: Default

Quote 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
677	INVN	FS-1016MFP	FS 1016MFP	1.00	0.00	0.00	0.00	202.45	202.45	202.45		232.81	
678	INVN	2H508110	ACTUATOR MRF	1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	
				2.00	0.00	0.00	0.00	1334.22	1334.22	1334.22		1534.36	

Buttons: Delete, View, Save, Copy

Quote Financials Details Frame

- **Currency:** The currency will auto populate. This field cannot be edited.

- **Tax Rate:** The tax rate will auto populate. This field cannot be edited.
- **Exchange Rate:** The exchange rate will auto populate.
 - To change this, delete the current exchange rate and type in the new exchange rate.
- **Quote Terms:** The quote terms will auto populate.
 - To change this, click on the **drop-down arrow** and select alternative payment terms if applicable.
- **Commercial:** The commercial will auto populate.
 - To change this, click on the **drop-down arrow** and select an alternative commercial if applicable.

CRM BPO2 Test Environment Judith Mudzengi

Save Quote

Case
 Customer: Build Construction
 Contact: Clere Zodia
 Subject: New cement products
 Case Information: New cement products

Quote
 * A quote will only be created if you add quote line items.
 * Customer: Build Construction
 * Quote Contact: John Holland
 Quote Reference: QT0010362
 Reference: Quote
 Comments: Quote
 Date: 27 Aug 2019
 * Site: London
 * Print Layout: SALESQUOTE

Quote Financials
 * Currency: South African Rand
 Tax Rate: 15.00000
 * Exchange Rate: 1.0000
 Quote Terms: Cash on Delivery
 Commercial: Default

Quote Detail ID	Add Item	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
677	INVN	FS-1016MFP	FS 1016MFP		1.00	0.00	0.00	0.00	202.45		202.45		232.81	
678	INVN	2HS08110	ACTUATOR MPF		1.00	0.00	0.00	0.00	1131.78		1131.78		1301.54	
					2.00	0.00	0.00	0.00	1334.22		1334.22		1534.36	

Buttons: Delete, View, Save, Copy

Quote Items Frame

1. **Add Item:** You can **add additional items** to the quote.
2. **Edit Line Item:** Click on the **Edit** icon to **edit a line item**.

CRM BPO2 Test Environment Judith Mudzengi

Save Quote

Case
 Customer: Build Construction
 Contact: Clere Zodwa
 Subject: New cement products
 Case Information: New cement products

Quote
 * A quote will only be created if you add quote line items.
 * Customer: Build Construction
 * Quote Contact: John Holland
 Quote Reference: QT0010362
 Reference: Quote
 Comments: Quote
 Date: 27 Aug 2019
 * Site: London
 * Print Layout: SALESQUOTE

Quote Financials
 * Currency: South African Rand
 Tax Rate: 15.00000
 Exchange Rate: 1.00000
 Quote Terms: Cash on Delivery
 Commercial: Default

Quote Detail ID	Add Item	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print	
677	INVN	FS-1016MFP	FS 1016MFP		1.00	0.00	0.00	0.00	202.45	202.45	202.45		232.81		
678	INVN	ZHS08110	ACTUATOR MFP		1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54		
											1334.22	1334.22	1334.22	1534.36	

Buttons: Delete, View, Save, Copy

3. **Delete Line Item:** Click on the **Delete** icon.

CRM BPO2 Test Environment Judith Mudzengi

Save Quote

Case
 Customer: Build Construction
 Contact: Clere Zodwa
 Subject: New cement products
 Case Information: New cement products

Quote
 * A quote will only be created if you add quote line items.
 * Customer: Build Construction
 * Quote Contact: John Holland
 Quote Reference: QT0010362
 Reference: Quote
 Comments: Quote
 Date: 27 Aug 2019
 * Site: London
 * Print Layout: SALESQUOTE

Quote Financials
 * Currency: South African Rand
 Tax Rate: 15.00000
 Exchange Rate: 1.00000
 Quote Terms: Cash on Delivery
 Commercial: Default

Quote Detail ID	Add Item	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print	
677	INVN	FS-1016MFP	FS 1016MFP		1.00	0.00	0.00	0.00	202.45	202.45	202.45		232.81		
678	INVN	ZHS08110	ACTUATOR MFP		1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54		
											1334.22	1334.22	1334.22	1534.36	

Buttons: Delete, View, Save, Copy

- A message will pop up asking you;
 - **Confirm Delete?**
- Click on **Ok**.

BPO2 Test Environment
192.168.100.150:60005 says
Judith Mudzengi

Confirm Delete?

Save Quote
←
📄

Case Subject: New cement products

Quote

- * A quote will only be created if you add quote line items.
- * Customer: Build Construction
- * Quote Contact: John Holland
- Quote Reference: QT0010362
- Reference: Quote
- Comments: Quote

Date: 27 Aug 2019
Site: London
Print Layout: SALESQUOTE

Quote Financials

- * Currency: South African Rand
- Tax Rate: 15.00000
- * Exchange Rate: 1.0000

Quote Terms: Cash on Delivery
Commercial: Default

Quote 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
677	INVN	FS-1016MFP	FS 1016MFP	1.00	0.00	0.00	0.00	202.45	202.45	202.45	🔗 🗑️	232.81	
678	INVN	2HS08110	ACTUATOR MFF	1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	
				2.00	0.00	0.00	0.00	1334.22	1334.22	1334.22		1534.36	

- The line item will be removed from the **Quote Items** section.

BPO2 Test Environment
Judith Mudzengi

Save Quote
←
📄

Case Subject: New cement products

Quote

- * A quote will only be created if you add quote line items.
- * Customer: Build Construction
- * Quote Contact: John Holland
- Quote Reference: QT0010362
- Reference: Quote
- Comments: Quote

Date: 27 Aug 2019
Site: London
Print Layout: SALESQUOTE

Quote Financials

- * Currency: South African Rand
- Tax Rate: 15.00000
- * Exchange Rate: 1.0000

Quote Terms: Cash on Delivery
Commercial: Default

Quote 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
678	INVN	2HS08110	ACTUATOR MFF	1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78	🔗 🗑️	1301.54	
				1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	

Save Changes

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

CRM BPO2 Test Environment Judith Mudzengi

Save Quote

Case Subject: New cement products

Quote

- * A quote will only be created if you add quote line items.
- * Customer: Build Construction
- * Quote Contact: John Holland
- Quote Reference: QT0010362
- Reference: Quote
- Comments: Quote
- Date: 27 Aug 2019
- * Site: London
- * Print Layout: SALESQUOTE

Quote Financials

- * Currency: South African Rand
- Tax Rate: 15.00000
- * Exchange Rate: 1.0000
- Quote Terms: Cash on Delivery
- Commercial: Default

Quote 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
678	INVN	2H508110	ACTUATOR MPF	1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	
				1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	

Buttons: Delete, View, Save, Copy

- A message will pop up informing you that;
 - **Quote saved successfully.**

Quote saved successfully.

Save Quote

Case Subject: New cement products

Quote

- * A quote will only be created if you add quote line items.
- * Customer: Build Construction
- * Quote Contact: John Holland
- Quote Reference: QT0010362
- Reference: Quote
- Comments: Quote
- Date: 27 Aug 2019
- * Site: London
- * Print Layout: SALESQUOTE

Quote Financials

- * Currency: South African Rand
- Tax Rate: 15.00000
- * Exchange Rate: 1.0000
- Quote Terms: Cash on Delivery
- Commercial: Default

Quote 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
678	INVN	2H508110	ACTUATOR MPF	1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	
				1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	

Buttons: Delete, View, Save, Copy

Delete Quote

- Click on **Delete**.

Save Quote
←

Case Subject: New cement products

Quote

* A quote will only be created if you add quote line items.

* Customer: Build Construction
 * Quote Contact: John Holland
 Quote Reference: QT0010362
 Reference: Quote
 Comments: Quote

Date: 27 Aug 2019
 * Site: London
 * Print Layout: SALESQUOTE

Quote Financials

* Currency: South African Rand
 Tax Rate: 15.00000
 * Exchange Rate: 1.0000

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
678	INVN	ZHS08110	ACTUATOR MPF	1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	
				1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	

→ Delete
 View
 Save
 Copy

- A message will pop up asking you;
 - **Are you sure you want to delete this quote?**
- Click on **Ok** .

CRM BPO2 Test Environment
Judith Mudzengi

Save Quote

Case Subject: New cement products

Quote

* A quote will only be created if you add quote line items.

* Customer: Build Construction
 * Quote Contact: John Holland
 Quote Reference: QT0010362
 Reference: Quote
 Comments: Quote

Date: 27 Aug 2019
 * Site: London
 * Print Layout: SALESQUOTE

Quote Financials

* Currency: South African Rand
 Tax Rate: 15.00000
 * Exchange Rate: 1.0000

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
678	INVN	ZHS08110	ACTUATOR MPF	1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	
				1.00	0.00	0.00	0.00	1131.78	1131.78	1131.78		1301.54	

Delete
 View
 Save
 Copy

192.168.100.150:60005 says

Are you sure you want to delete this quote?

OK Cancel

- The quote will be removed from the **Quotes** screen.

CRM 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
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
QT0010363	BUI0001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	New Quote	No
QT0010364	BUI0001	Build Construction	Quote	21366.51	ZAR	27 Aug 2019	New Quote	No

Page 1 of 1 (5 items) Page size: 10

MARK QUOTE AS ACCEPTED

- Click on the **Mark Quote As Accepted** icon.

CRM 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
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
QT0010363	BUI0001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	New Quote	No
QT0010364	BUI0001	Build Construction	Quote	21366.51	ZAR	27 Aug 2019	New Quote	No

Page 1 of 1 (5 items) Page size: 10

- A message will pop up asking you;
 - Are you sure you want to set this quote as accepted?**
- Click on **Ok**.

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
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
QT0010363	BUI0001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	New Quote	No
QT0010364	BUI0001	Build Construction	Quote	21366.51	ZAR	27 Aug 2019	New Quote	No

- The **Edit Quote icon** and **Mark Quote As Accepted icon** will become inactive (greyed out) when the quote is marked as accepted.

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0010257	71500016	Adaptive Directional	Test 1	1422.21	ZAR	17 Nov 2018	Invoiced Quote	Yes
QT0010358	HOP0001	Hope Works		1222.33	ZAR	15 Aug 2019	New Quote	Yes
QT0010360	HOP0001	Hope Works		1001.99	ZAR	19 Aug 2019	Customer Accepted Quote	No
QT0010363	BUI0001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	New Quote	No
QT0010364	BUI0001	Build Construction	Quote	21366.51	ZAR	27 Aug 2019	New Quote	No

MARK QUOTE AS REJECTED

- Click on the **Mark Quote As Rejected icon** .

CRM BPO2 Test Environment Judith Mudzengi

Quotes

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0010257	71500016	Adaptive Directional	Test 1	1422.21	ZAR	17 Nov 2018	Invoiced Quote	Yes
QT0010358	HOP0001	Hope Works		1222.33	ZAR	15 Aug 2019	New Quote	Yes
QT0010360	HOP0001	Hope Works		1001.99	ZAR	19 Aug 2019	Customer Accepted Quote	No
QT0010363	BUI0001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	New Quote	No
QT0010364	BUI0001	Build Construction	Quote	21366.51	ZAR	27 Aug 2019	New Quote	No

Page 1 of 1 (5 items) Page size: 10

- A message box will pop up asking you;
 - **Are you sure you want to set this quote as rejected?**
- Click on **Ok**.

CRM BPO2 Test Environment Judith Mudzengi

Quotes

192.168.100.150:60005 says

Are you sure you want to set this quote as rejected?

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0010257	71500016	Adaptive Directional	Test 1	1422.21	ZAR	17 Nov 2018	Invoiced Quote	Yes
QT0010358	HOP0001	Hope Works		1222.33	ZAR	15 Aug 2019	New Quote	Yes
QT0010360	HOP0001	Hope Works		1001.99	ZAR	19 Aug 2019	Customer Accepted Quote	No
QT0010363	BUI0001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	New Quote	No
QT0010364	BUI0001	Build Construction	Quote	21366.51	ZAR	27 Aug 2019	New Quote	No

Page 1 of 1 (5 items) Page size: 10

- The **Edit Quote icon** and **Mark Quote As Rejected icon** will become inactive (greyed out) when the quote is marked as rejected.

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0010257	71500016	Adaptive Directional	Test 1	1422.21	ZAR	17 Nov 2018	Invoiced Quote	Yes
QT0010358	HOP0001	Hope Works		1222.33	ZAR	15 Aug 2019	New Quote	Yes
QT0010360	HOP0001	Hope Works		1001.99	ZAR	19 Aug 2019	Customer Accepted Quote	No
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) Page size: 10

ACCESS CUSTOMER SPECIFIC QUOTES FROM HOME PAGE

1. Click on the **Customers** tile in the **Home page**.

The screenshot shows the CRM Dashboard with the following components:

- Header:** CRM BPO2 Test Environment, Judith Mudzengi, Search bar.
- Activities for Last 30 Days:** Table with columns: Description, Target, Existing Custmrs, New Custmrs. Status: Nothing to display.
- Performance:** Line chart showing performance metrics from 0 to 1.00.
- Pipeline:** Status: Fetching data...
- Navigation Tiles:**
 - create cold call (0)
 - recommendations (4)
 - warnings (4)
 - customers (285)
 - cases (4)
 - activities (4)
 - quotes (5)
- Footer:** bp integration application, ©2019 CO3 Technologies (Pty) Ltd (3.5.5.1 / 3.5.5.1), CO3 TECHNOLOGIES logo.

- The **Customers** listing page will open.
- All of the customers will be listed here.

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	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 system will filter for and display the customer in this page.
3. Click on the **View** icon.

View	Customer	Code	Contact	Contact phone	Contact email	Comple	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] [2] [3] [4] [5] [6] [7] [8] [9] [10] [11] [12] [13] [14] [15] [16] [17] [18] [19] [20] [21] [22] [23] [24] [25] [26] [27] [28] [29] [30] [31] [32] [33] [34] [35] [36] [37] [38] [39] [40] [41] [42] [43] [44] [45] [46] [47] [48] [49] [50] [51] [52] [53] [54] [55] [56] [57] [58] [59] [60] [61] [62] [63] [64] [65] [66] [67] [68] [69] [70] [71] [72] [73] [74] [75] [76] [77] [78] [79] [80] [81] [82] [83] [84] [85] [86] [87] [88] [89] [90] [91] [92] [93] [94] [95] [96] [97] [98] [99] [100] [101] [102] [103] [104] [105] [106] [107] [108] [109] [110] [111] [112] [113] [114] [115] [116] [117] [118] [119] [120] [121] [122] [123] [124] [125] [126] [127] [128] [129] [130] [131] [132] [133] [134] [135] [136] [137] [138] [139] [140] [141] [142] [143] [144] [145] [146] [147] [148] [149] [150] [151] [152] [153] [154] [155] [156] [157] [158] [159] [160] [161] [162] [163] [164] [165] [166] [167] [168] [169] [170] [171] [172] [173] [174] [175] [176] [177] [178] [179] [180] [181] [182] [183] [184] [185] [186] [187] [188] [189] [190] [191] [192] [193] [194] [195] [196] [197] [198] [199] [200] [201] [202] [203] [204] [205] [206] [207] [208] [209] [210] [211] [212] [213] [214] [215] [216] [217] [218] [219] [220] [221] [222] [223] [224] [225] [226] [227] [228] [229] [230] [231] [232] [233] [234] [235] [236] [237] [238] [239] [240] [241] [242] [243] [244] [245] [246] [247] [248] [249] [250] [251] [252] [253] [254] [255] [256] [257] [258] [259] [260] [261] [262] [263] [264] [265] [266] [267] [268] [269] [270] [271] [272] [273] [274] [275] [276] [277] [278] [279] [280] [281] [282] [283] [284] [285] [286] [287] [288] [289] [290] [291] [292] [293] [294] [295] [296] [297] [298] [299] [300] [301] [302] [303] [304] [305] [306] [307] [308] [309] [310] [311] [312] [313] [314] [315] [316] [317] [318] [319] [320] [321] [322] [323] [324] [325] [326] [327] [328] [329] [330] [331] [332] [333] [334] [335] [336] [337] [338] [339] [340] [341] [342] [343] [344] [345] [346] [347] [348] [349] [350] [351] [352] [353] [354] [355] [356] [357] [358] [359] [360] [361] [362] [363] [364] [365] [366] [367] [368] [369] [370] [371] [372] [373] [374] [375] [376] [377] [378] [379] [380] [381] [382] [383] [384] [385] [386] [387] [388] [389] [390] [391] [392] [393] [394] [395] [396] [397] [398] [399] [400] [401] [402] [403] [404] [405] [406] [407] [408] [409] [410] [411] [412] [413] [414] [415] [416] [417] [418] [419] [420] [421] [422] [423] [424] [425] [426] [427] [428] [429] [430] [431] [432] [433] [434] [435] [436] [437] [438] [439] [440] [441] [442] [443] [444] [445] [446] [447] [448] [449] [450] [451] [452] [453] [454] [455] [456] [457] [458] [459] [460] [461] [462] [463] [464] [465] [466] [467] [468] [469] [470] [471] [472] [473] [474] [475] [476] [477] [478] [479] [480] [481] [482] [483] [484] [485] [486] [487] [488] [489] [490] [491] [492] [493] [494] [495] [496] [497] [498] [499] [500] [501] [502] [503] [504] [505] [506] [507] [508] [509] [510] [511] [512] [513] [514] [515] [516] [517] [518] [519] [520] [521] [522] [523] [524] [525] [526] [527] [528] [529] [530] [531] [532] [533] [534] [535] [536] [537] [538] [539] [540] [541] [542] [543] [544] [545] [546] [547] [548] [549] [550] [551] [552] [553] [554] [555] [556] [557] [558] [559] [560] [561] [562] [563] [564] [565] [566] [567] [568] [569] [570] [571] [572] [573] [574] [575] [576] [577] [578] [579] [580] [581] [582] [583] [584] [585] [586] [587] [588] [589] [590] [591] [592] [593] [594] [595] [596] [597] [598] [599] [600] [601] [602] [603] [604] [605] [606] [607] [608] [609] [610] [611] [612] [613] [614] [615] [616] [617] [618] [619] [620] [621] [622] [623] [624] [625] [626] [627] [628] [629] [630] [631] [632] [633] [634] [635] [636] [637] [638] [639] [640] [641] [642] [643] [644] [645] [646] [647] [648] [649] [650] [651] [652] [653] [654] [655] [656] [657] [658] [659] [660] [661] [662] [663] [664] [665] [666] [667] [668] [669] [670] [671] [672] [673] [674] [675] [676] [677] [678] [679] [680] [681] [682] [683] [684] [685] [686] [687] [688] [689] [690] [691] [692] [693] [694] [695] [696] [697] [698] [699] [700] [701] [702] [703] [704] [705] [706] [707] [708] [709] [710] [711] [712] [713] [714] [715] [716] [717] [718] [719] [720] [721] [722] [723] [724] [725] [726] [727] [728] [729] [730] [731] [732] [733] [734] [735] [736] [737] [738] [739] [740] [741] [742] [743] [744] [745] [746] [747] [748] [749] [750] [751] [752] [753] [754] [755] [756] [757] [758] [759] [760] [761] [762] [763] [764] [765] [766] [767] [768] [769] [770] [771] [772] [773] [774] [775] [776] [777] [778] [779] [780] [781] [782] [783] [784] [785] [786] [787] [788] [789] [790] [791] [792] [793] [794] [795] [796] [797] [798] [799] [800] [801] [802] [803] [804] [805] [806] [807] [808] [809] [810] [811] [812] [813] [814] [815] [816] [817] [818] [819] [820] [821] [822] [823] [824] [825] [826] [827] [828] [829] [830] [831] [832] [833] [834] [835] [836] [837] [838] [839] [840] [841] [842] [843] [844] [845] [846] [847] [848] [849] [850] [851] [852] [853] [854] [855] [856] [857] [858] [859] [860] [861] [862] [863] [864] [865] [866] [867] [868] [869] [870] [871] [872] [873] [874] [875] [876] [877] [878] [879] [880] [881] [882] [883] [884] [885] [886] [887] [888] [889] [890] [891] [892] [893] [894] [895] [896] [897] [898] [899] [900] [901] [902] [903] [904] [905] [906] [907] [908] [909] [910] [911] [912] [913] [914] [915] [916] [917] [918] [919] [920] [921] [922] [923] [924] [925] [926] [927] [928] [929] [930] [931] [932] [933] [934] [935] [936] [937] [938] [939] [940] [941] [942] [943] [944] [945] [946] [947] [948] [949] [950] [951] [952] [953] [954] [955] [956] [957] [958] [959] [960] [961] [962] [963] [964] [965] [966] [967] [968] [969] [970] [971] [972] [973] [974] [975] [976] [977] [978] [979] [980] [981] [982] [983] [984] [985] [986] [987] [988] [989] [990] [991] [992] [993] [994] [995] [996] [997] [998] [999] [1000]

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

Customer Dashboard | Judith Mudzengi

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Nothing to display			

Performance

Pipeline | Fetching data...

Build Construction - BUI0001

Trading Name: Build Construction
 Registered Name: Build Construction
 Description: Build Construction
 VAT No: 567849
 Registration: 567894
 Rank: Platinum
 Website: <http://www.buildconstruction.nowebite>
 Phone: 031 456 789

12 Months Sales History

Month	Contract Scores	Sales Revenue
October 2018	0.00	0.00
November 2018	0.00	0.00
December 2018	0.00	0.00
January 2019	0.00	0.00
February 2019	0.00	0.00
March 2019	0.00	0.00
April 2019	0.00	0.00
May 2019	0.00	0.00
June 2019	0.00	0.00
July 2019	0.00	0.00
August 2019	0.00	0.00
September 2019	0.00	0.00
October 2019	0.00	0.00
November 2019	0.00	0.00

- The **Quotes for [selected customer]** page will open.
- All of the quotes linked to this customer will be displayed (even ones where you are not the Salesman).
- For more information refer to [CRM Customers: Quotes](#).

Quotes for Build Construction | Judith Mudzengi

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0010363	BUI0001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	Customer Rejected Quote	No
QT0010364	BUI0001	Build Construction	Quote	2136.51	ZAR	27 Aug 2019	New Quote	No

Page 1 of 1 (2 items) | Page size: 10

CRM.000.015

