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

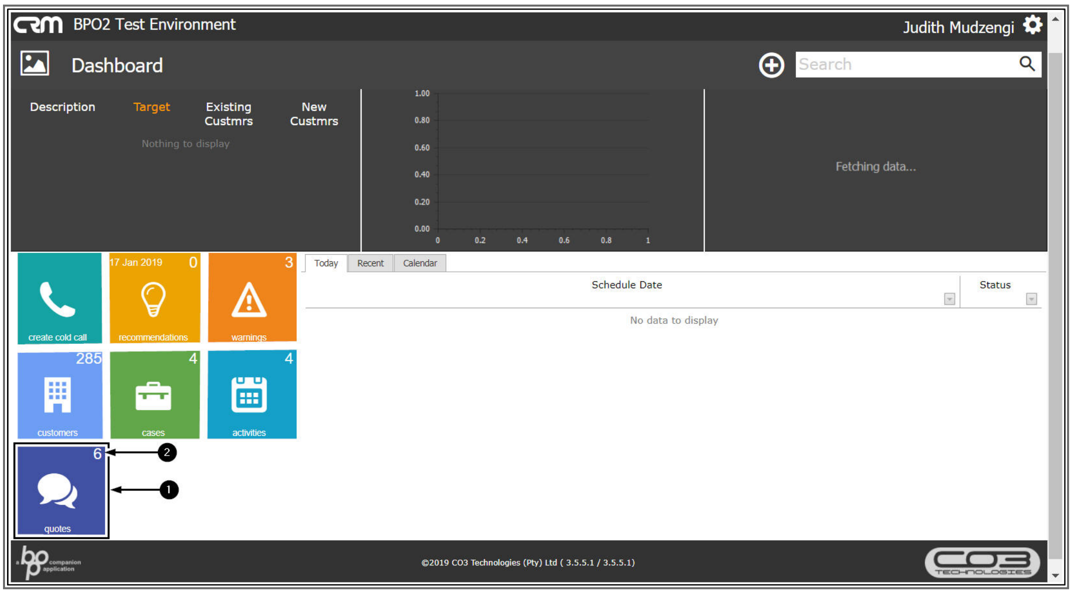
- creating a new Case or
- editing a Case
- adding or editing an Activity
- or from the Case and Activity lists.

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

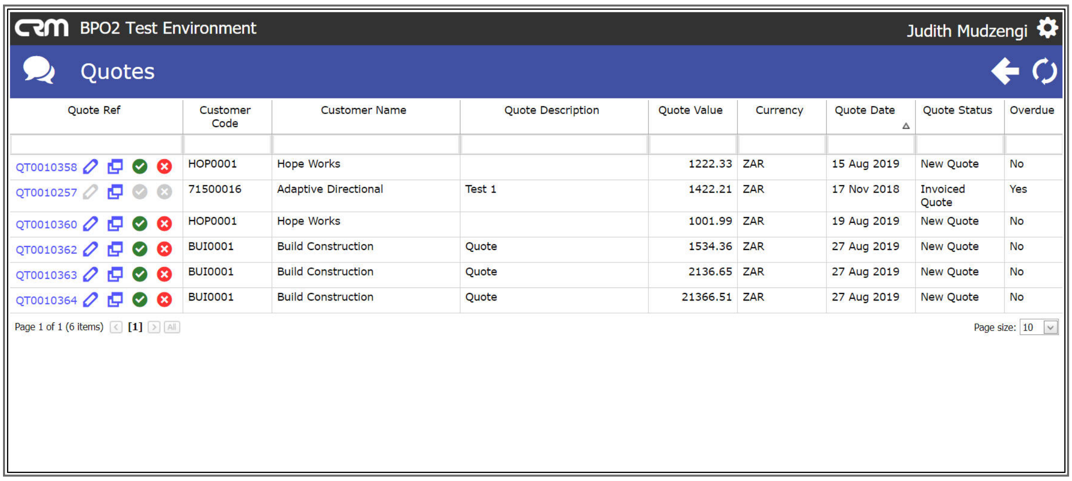
Access: Webpage > http://[servername]:[portno]/BPOCRM/User.aspx

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.



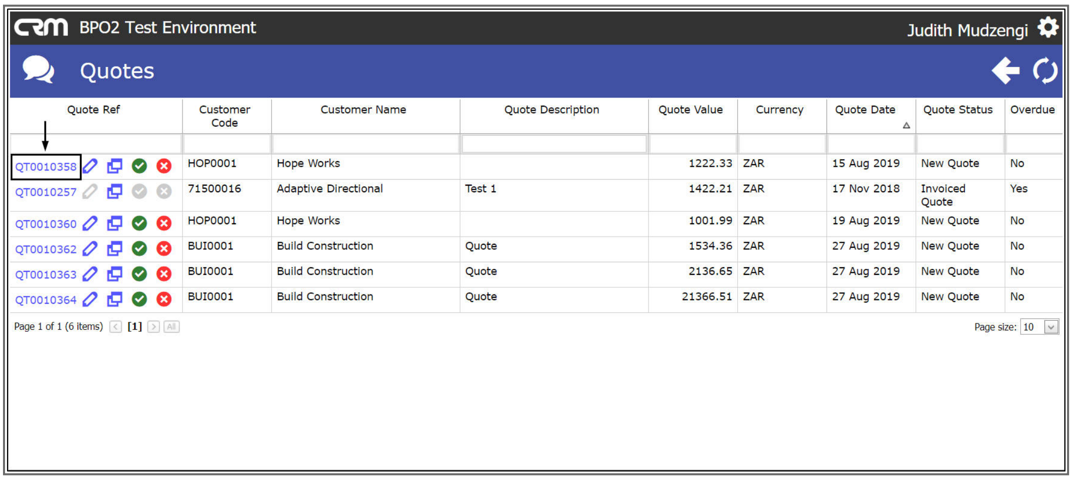
- The **Quotes** listing page will open.
- A list of **New** , **Accepted** and **Rejected** quotes for all customers on the system, where you are the Salesman, will be displayed.



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

PRINT / EMAIL QUOTE

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



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
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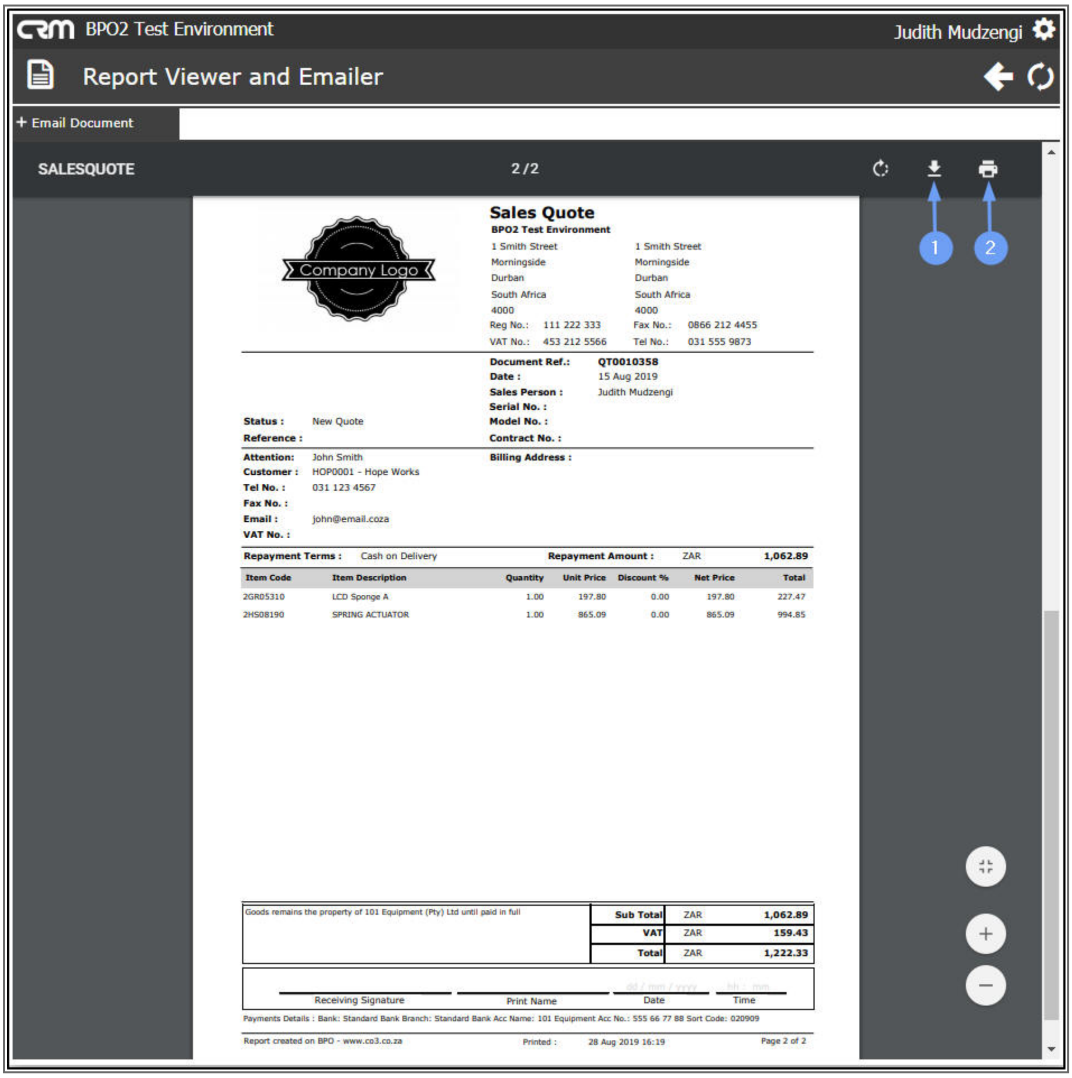
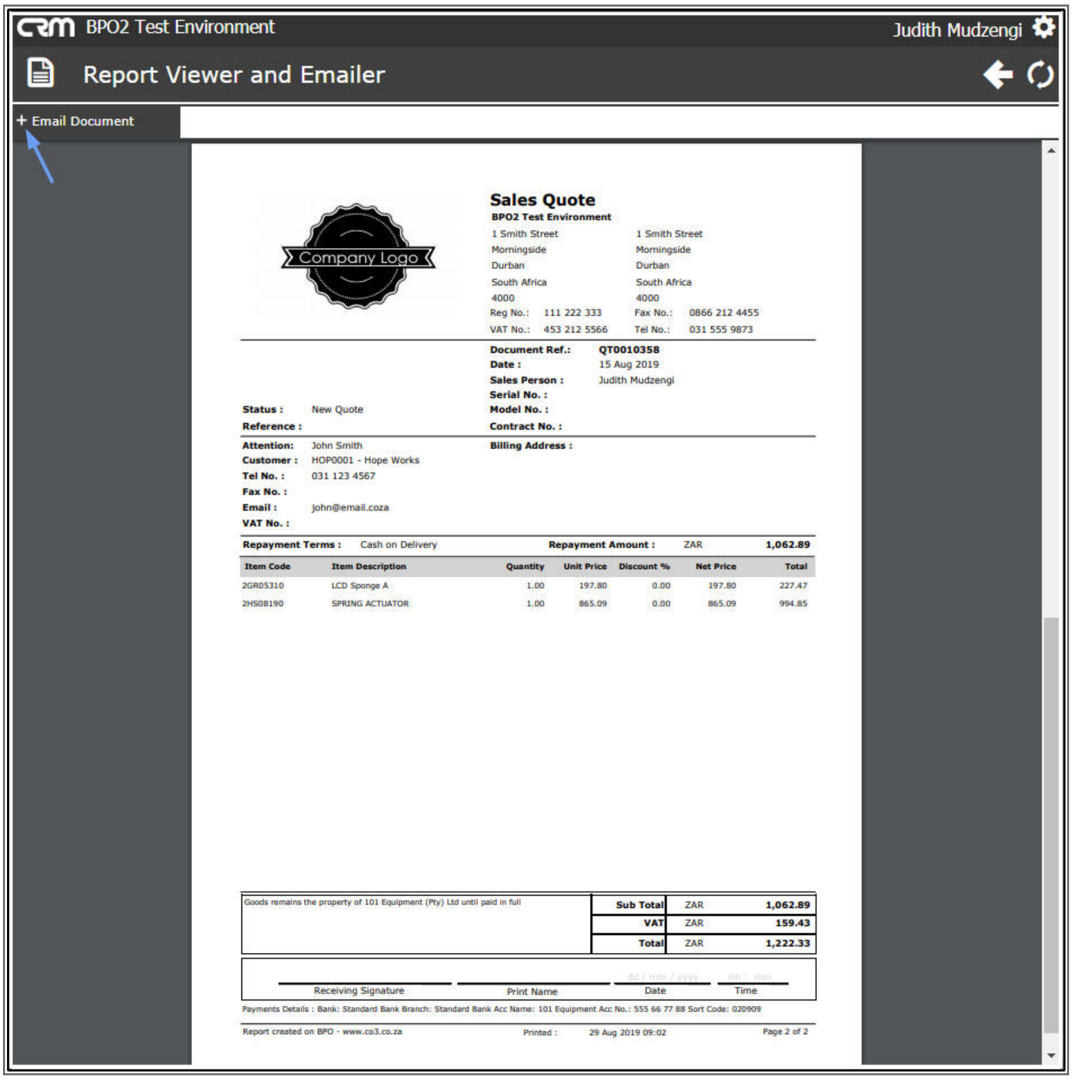
QT0010360	HOP0001	Hope Works		1001.99	ZAR	19 Aug 2019	New Quote	No
QT0010362	BUI0001	Build Construction	Quote	1534.36	ZAR	27 Aug 2019	New Quote	No
QT0010363	BUI0001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	New Quote	No
QT0010364	BUI0001	Build Construction	Quote	21366.51	ZAR	27 Aug 2019	New Quote	No

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

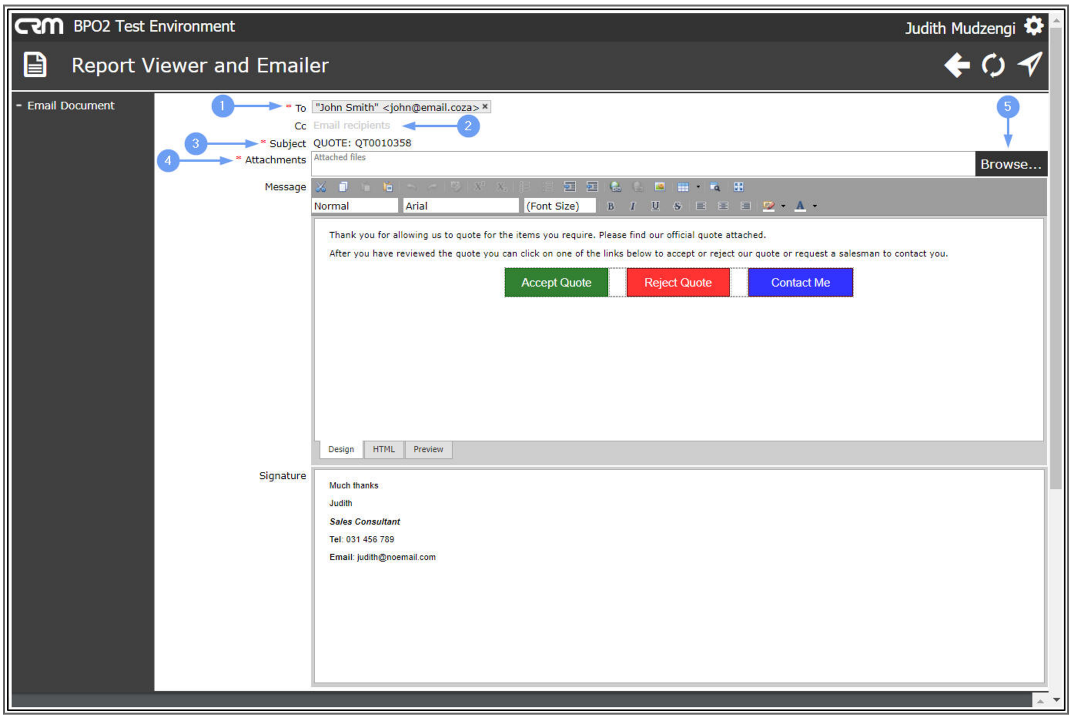


- To email the quote, click on the [**+**] sign in the **Email Document** section.

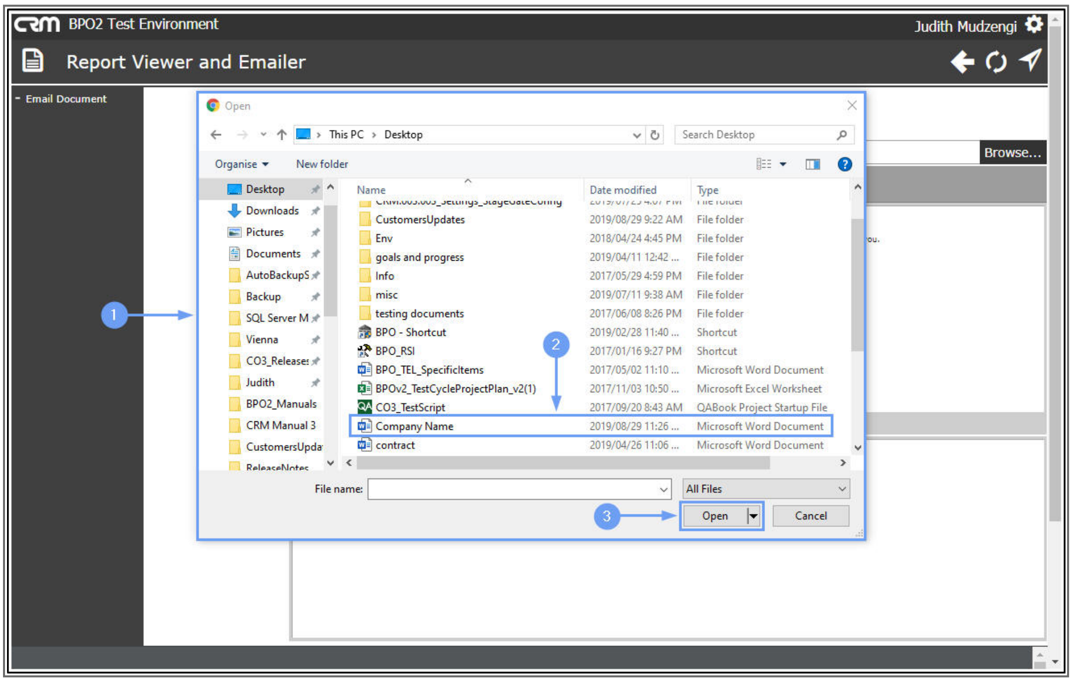


The **Email Document** section will be expanded.

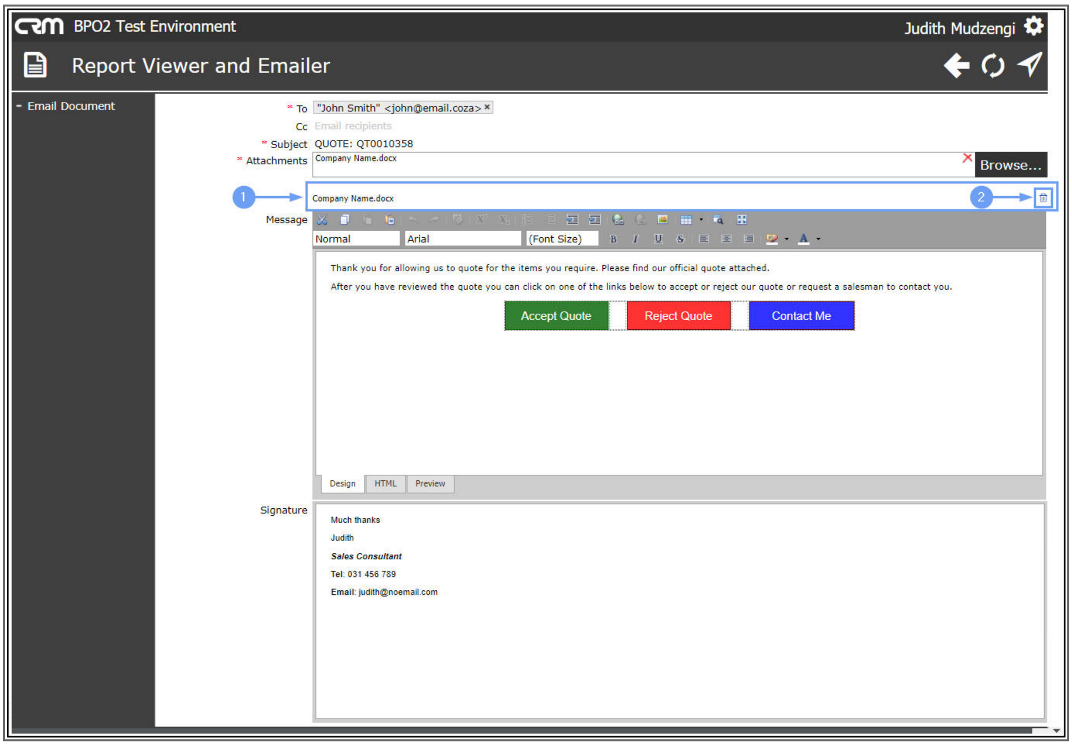
1. **To:** This field will auto populate with the CRM contact for the case but you can change this if applicable.
2. **Cc:** In this field, you can add other email recipients if applicable.
3. **Subject:** This field will auto populate with the selected quote number but you can edit this if applicable.
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**.

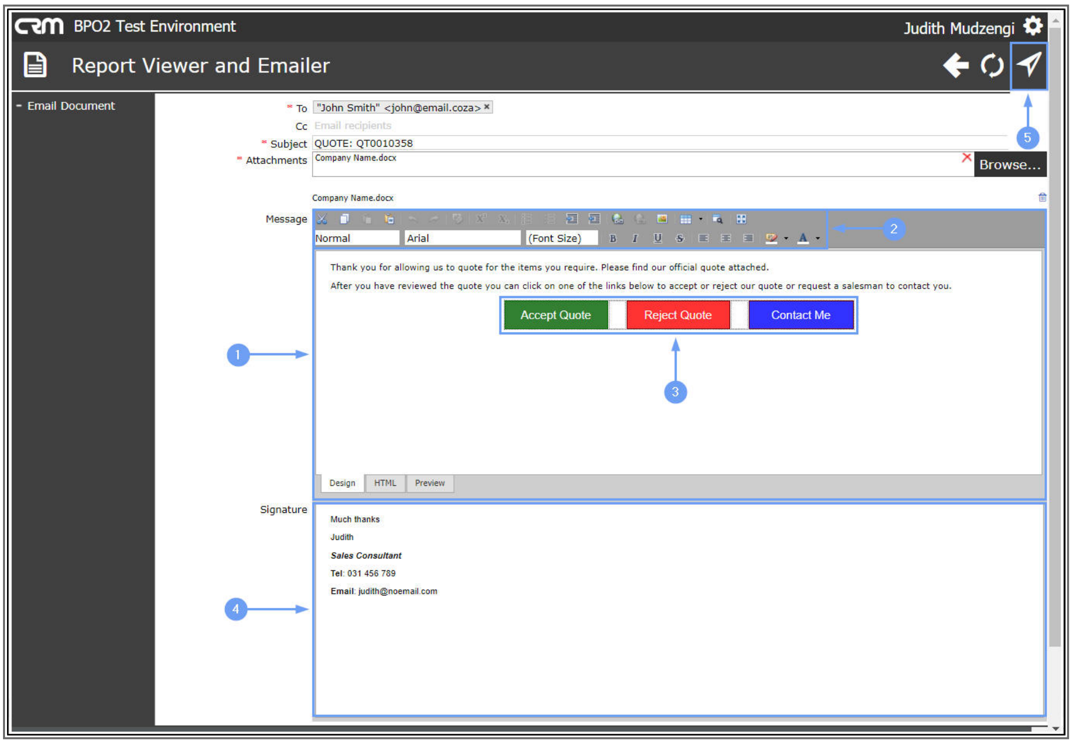


1. The file will now be attached to the email.
2. You can delete the attachment if required by clicking on the **Delete** icon.

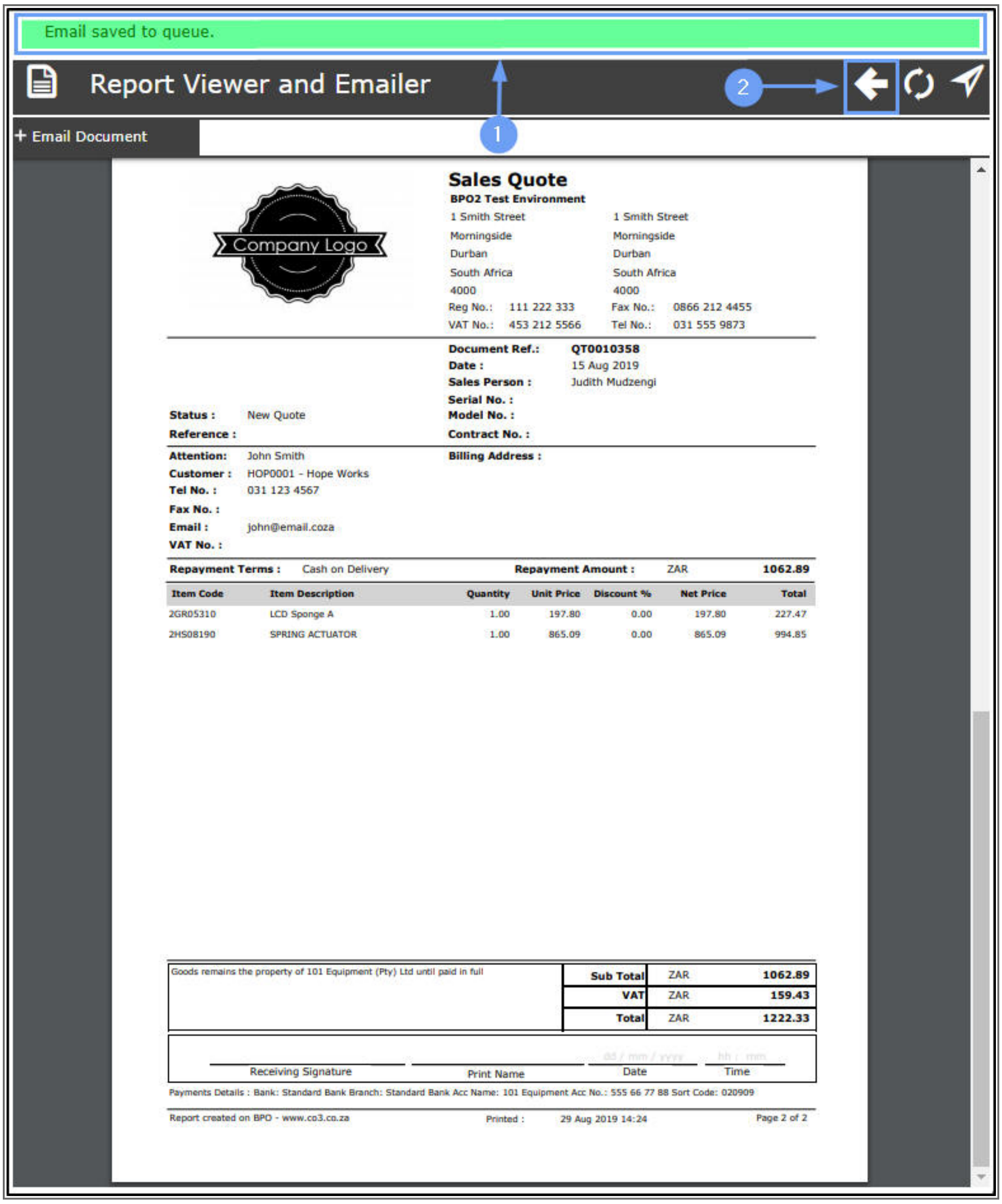


1. The **message body** may auto populate but you can edit this. Type in the relevant details in the message body.
2. You can use the **tool bar** to customize your email message.
3. The email body has a link that allows the recipient to:
    - **Accept Quote** : The quote will automatically be marked 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)**

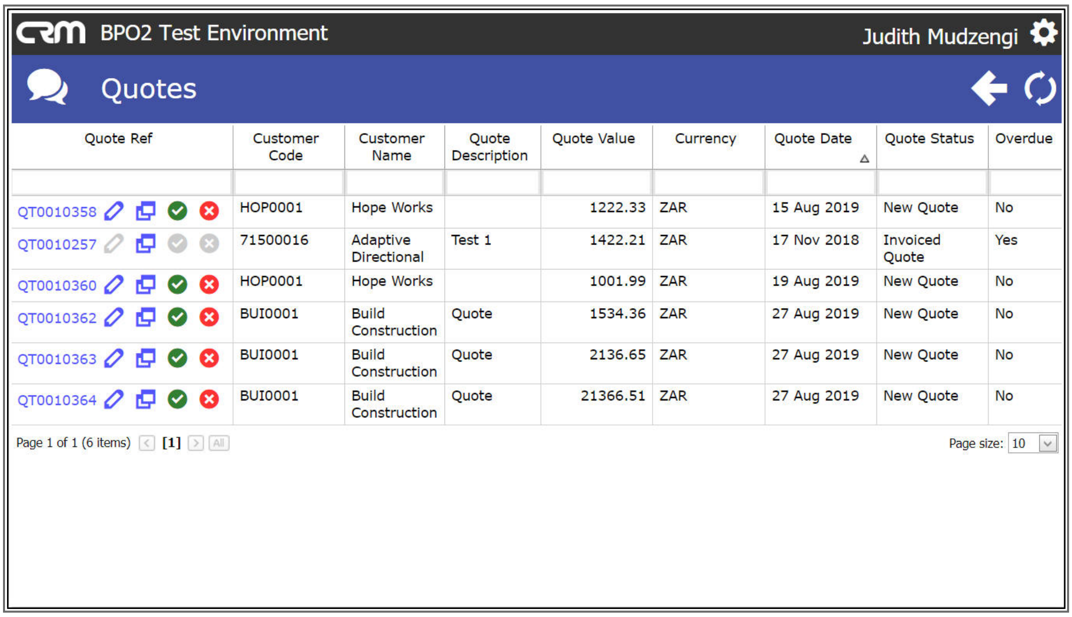
4. The **Signature** will auto populate depending on your personal email settings or the default email settings.
5. When you are done, click on the **Send** icon.



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

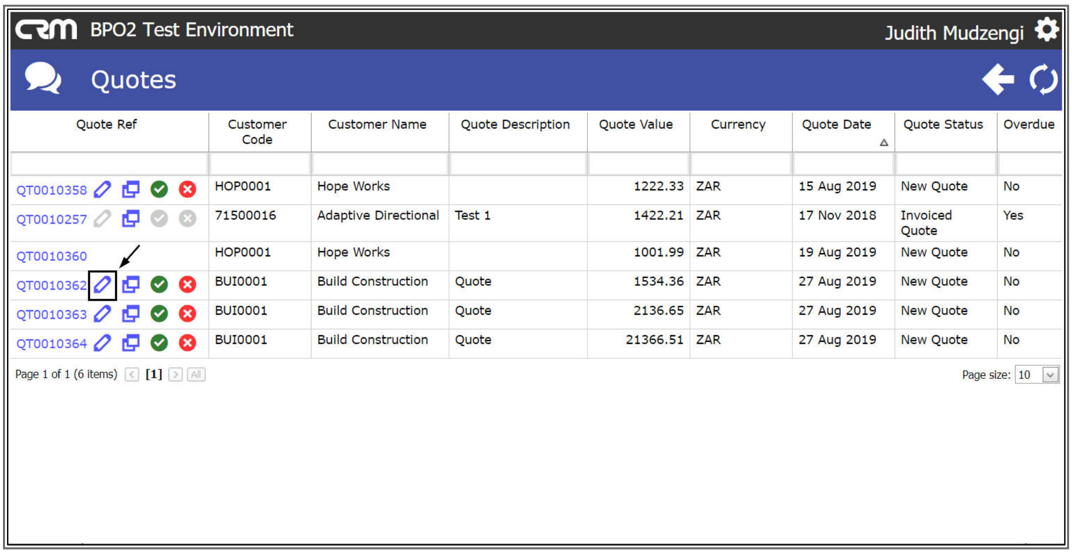


- You will return to the **Quotes** listing page.



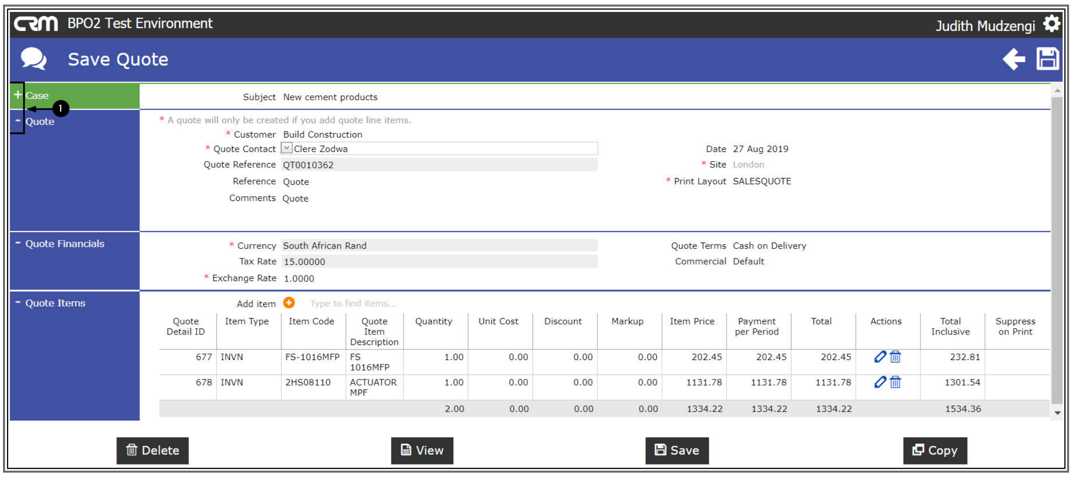
View / Edit / Delete Quote

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



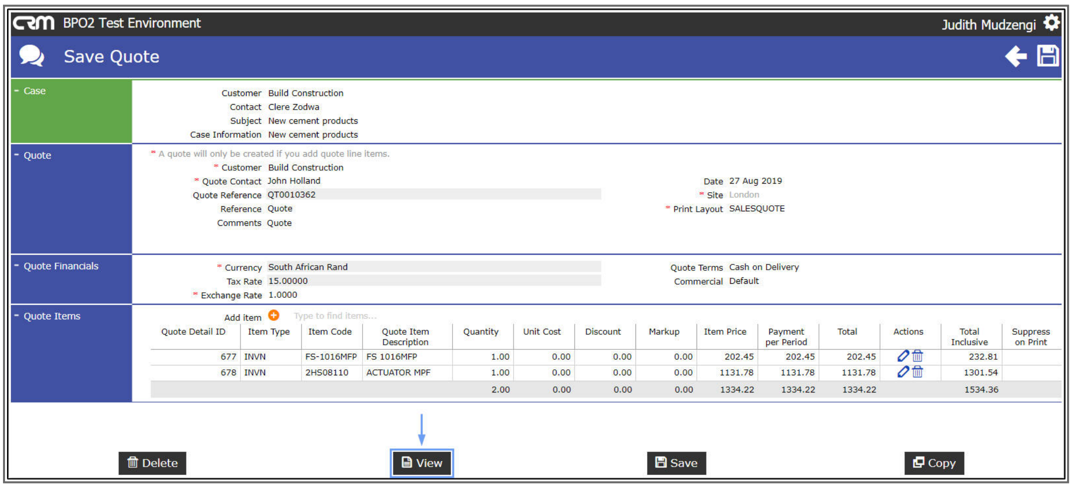
The **Save Quote** screen will be displayed.

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.



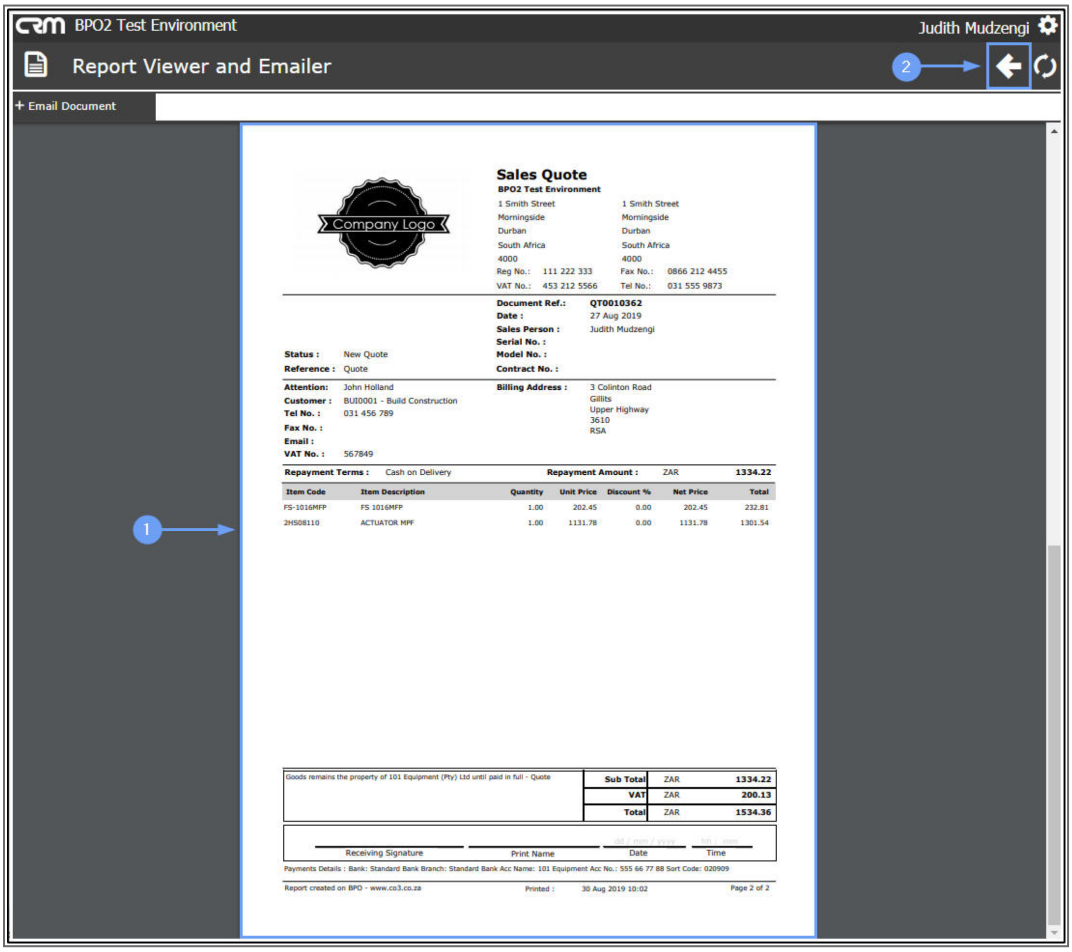
View Quote

- Click on **View**.

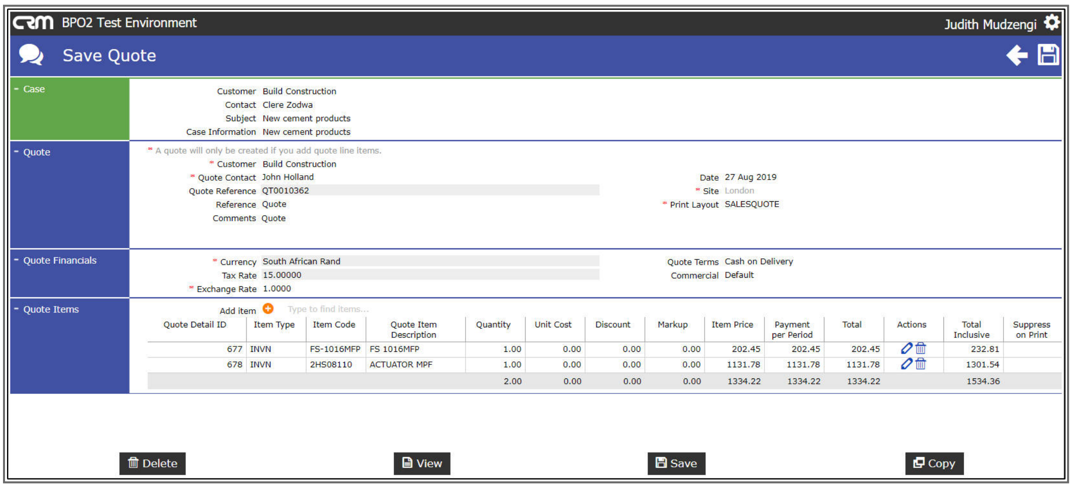


The **Report Viewer and Emailer** screen will be displayed.

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



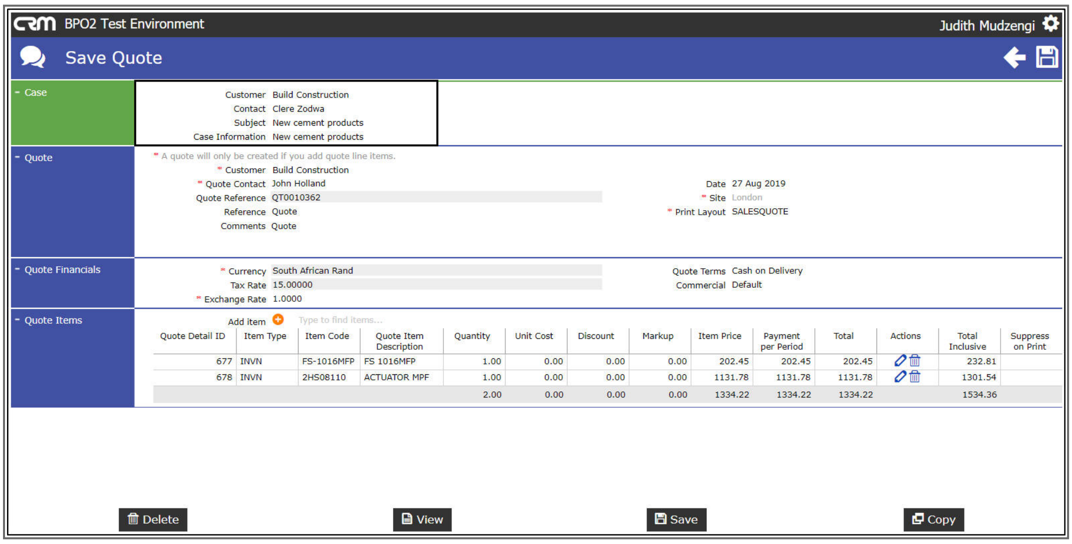
- You will return to the **Save Quote** screen.



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.

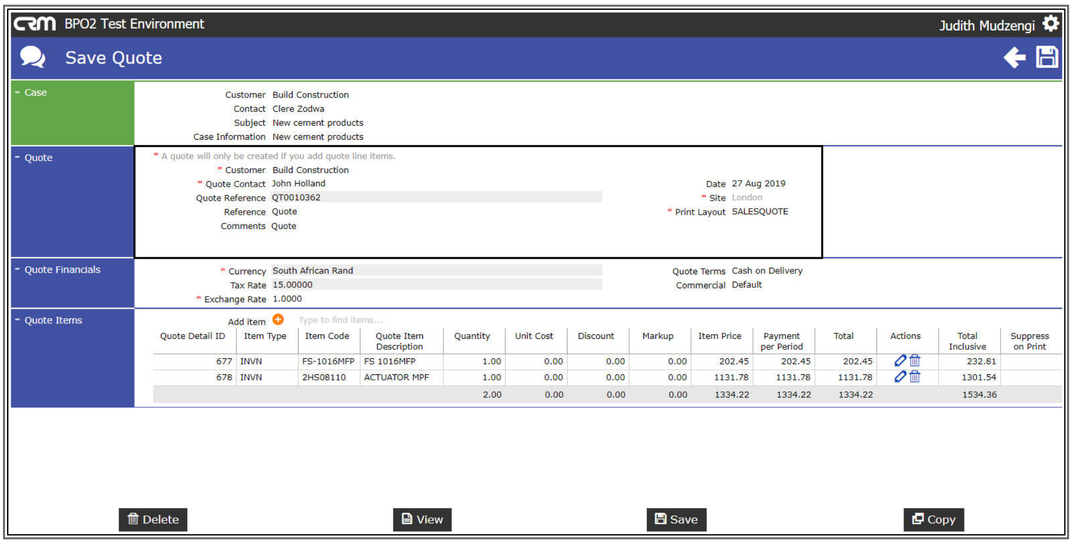


Quote Frame

- **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.

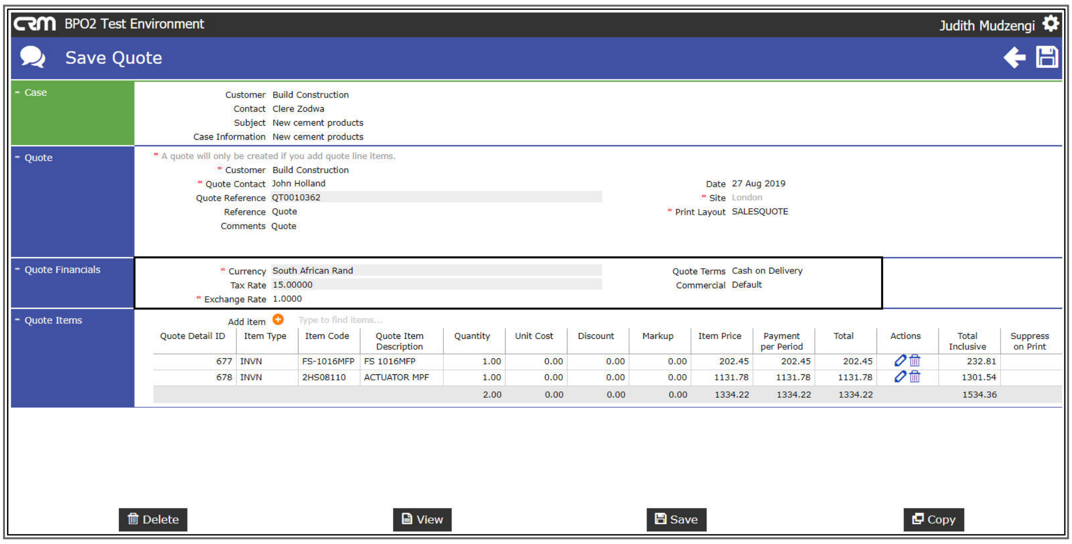
- **Quote Reference:** This quote reference will auto populate with the quote number. This field cannot be edited.
- **Reference:** The reference will auto populate but you can edit this, if applicable.
- **Comments:** The comments will auto populate but you can edit this, if applicable.
- **Date** : 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.



Quote Financials Details Frame

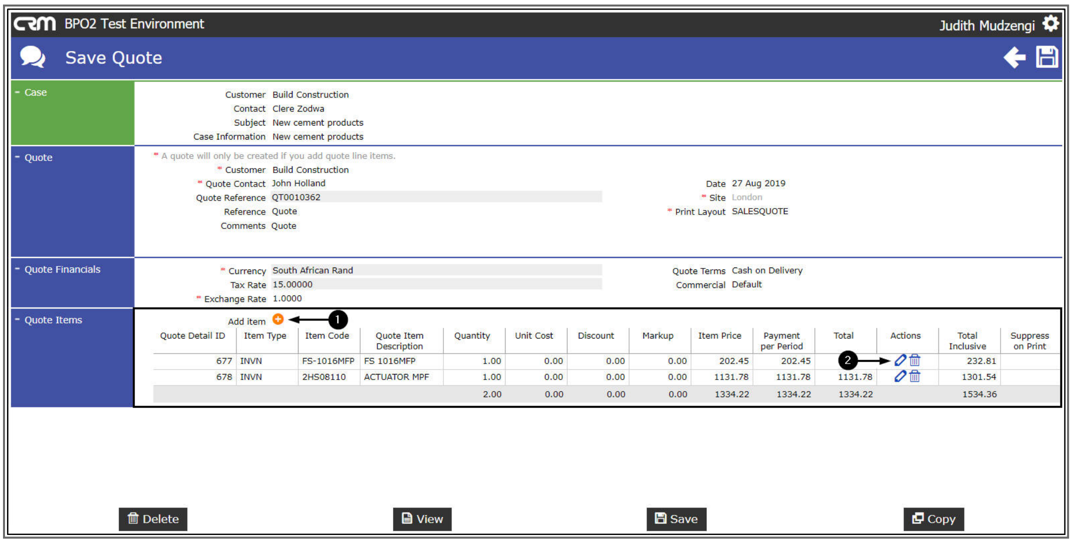
- **Currency:** The currency will auto populate. This field cannot be edited.

- **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.

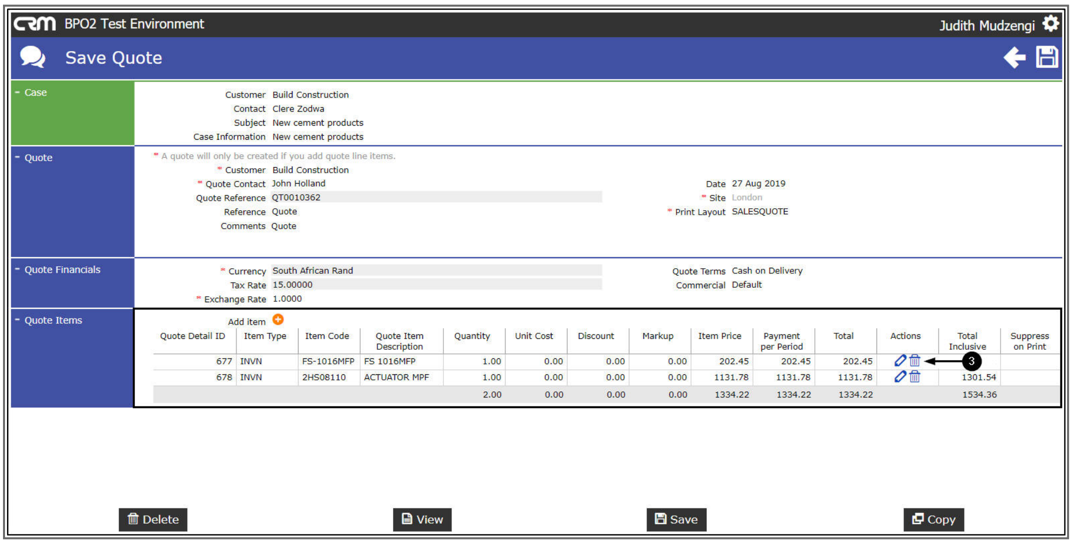


Quote Items Frame

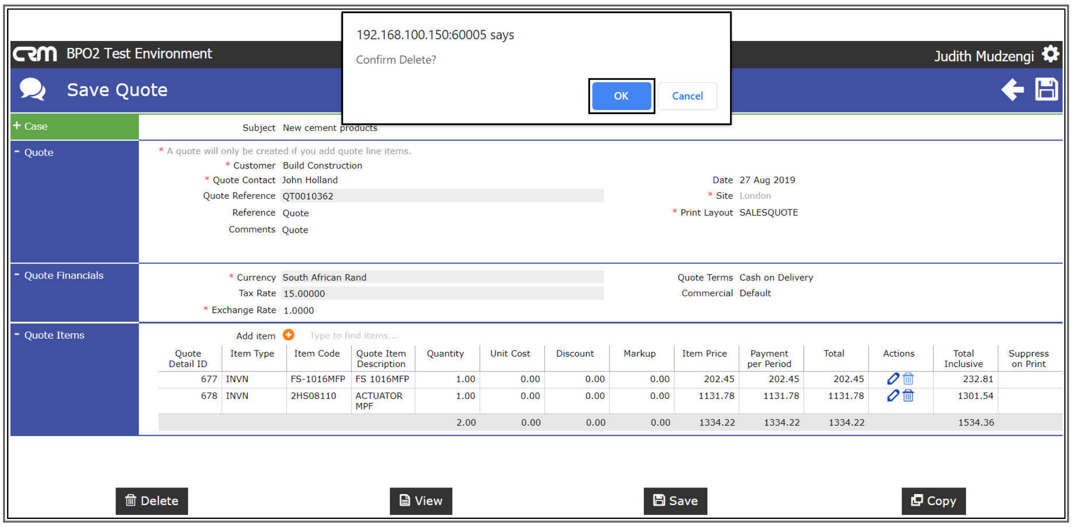
1. **Add Item:** You can add additional items to the quote.
2. **Edit Line Item:** Click on the **Edit** icon to edit a line item .



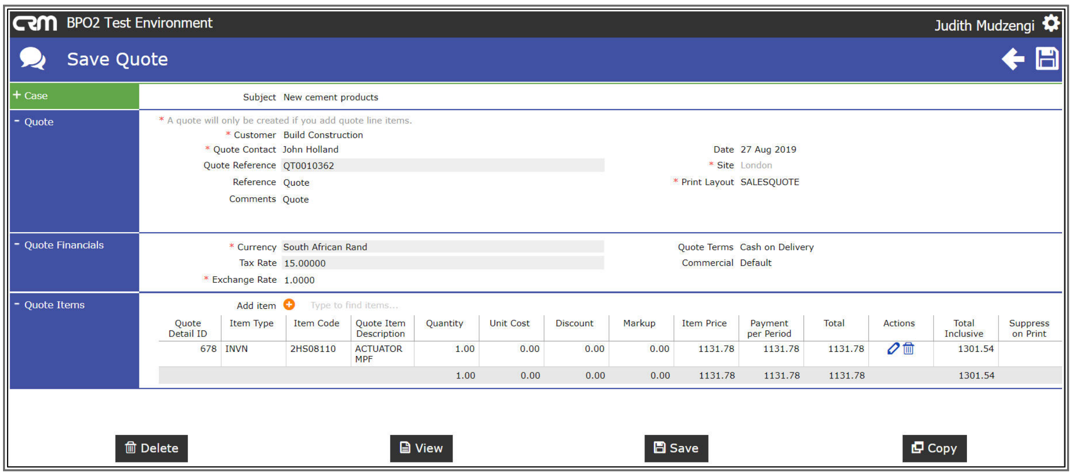
3. **Delete Line Item:** Click on the **Delete** icon.



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

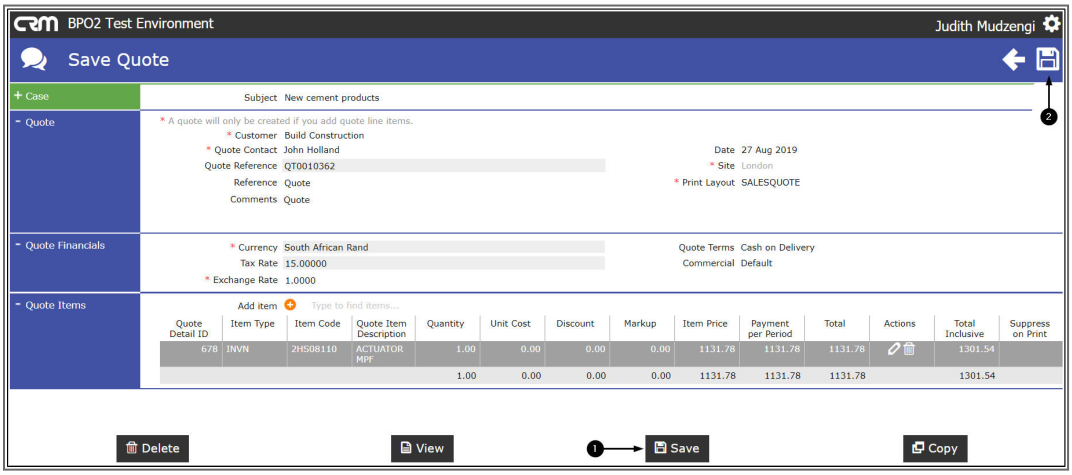


1. The line item will be removed from the **Quote Items** section.

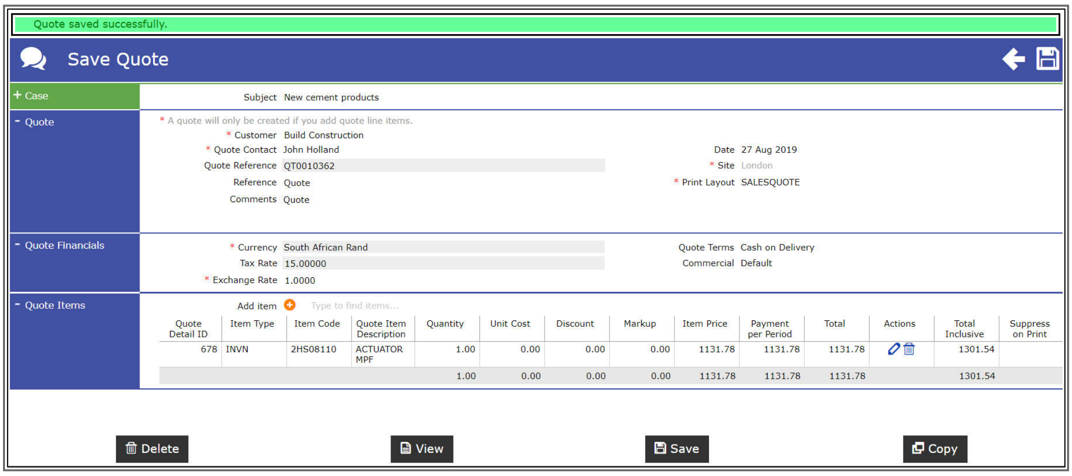


Save Changes

1. Click on either the **Save** button or
2. **Save** icon.

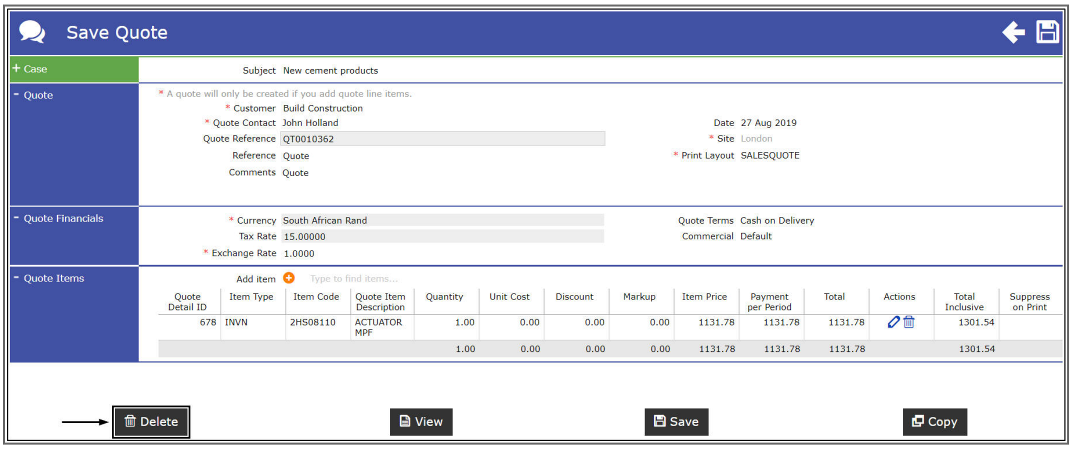


- A message will pop up informing you that;
  - **Quote saved successfully.**

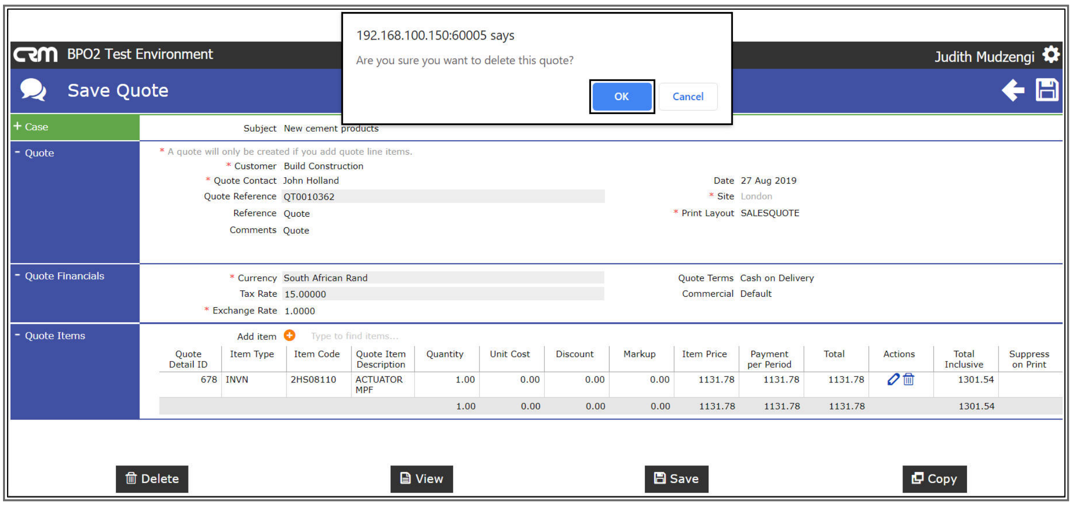


Delete Quote

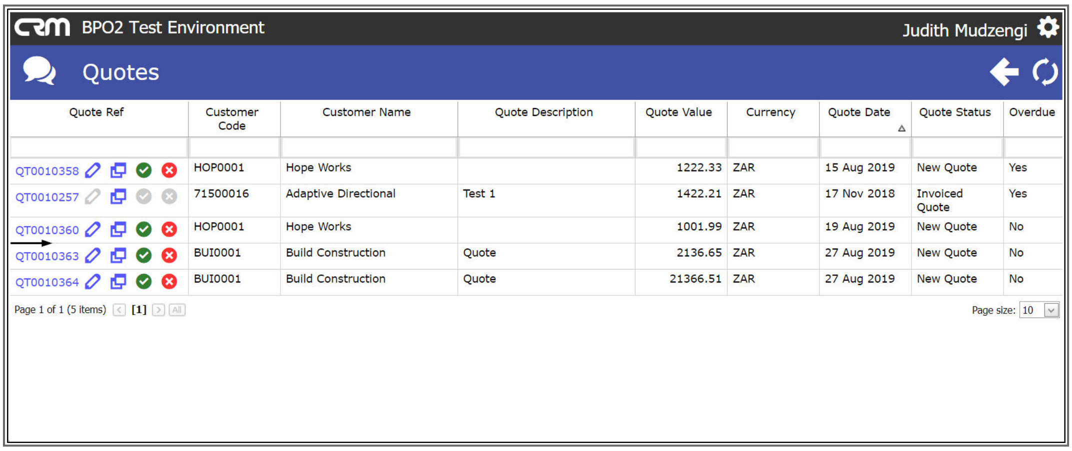
- Click on **Delete** .



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

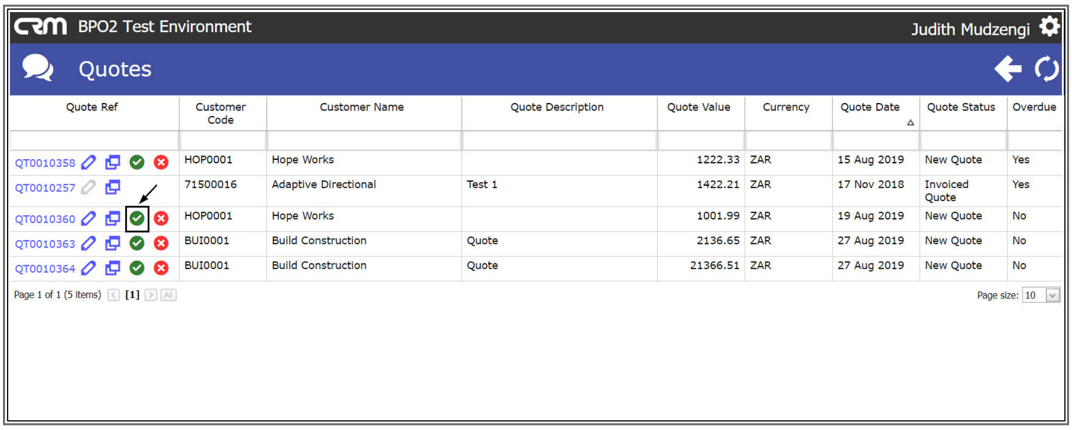


- The quote will be removed from the **Quotes** screen.

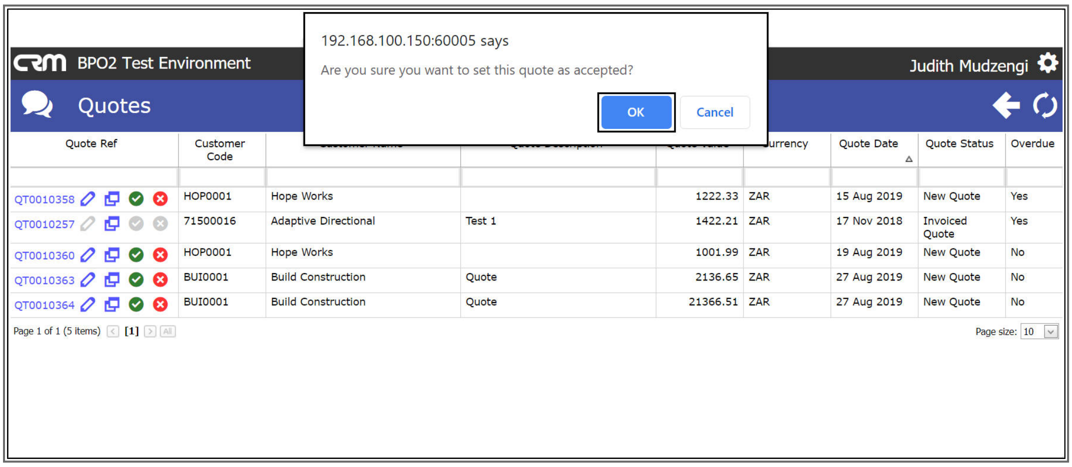


MARK QUOTE AS ACCEPTED

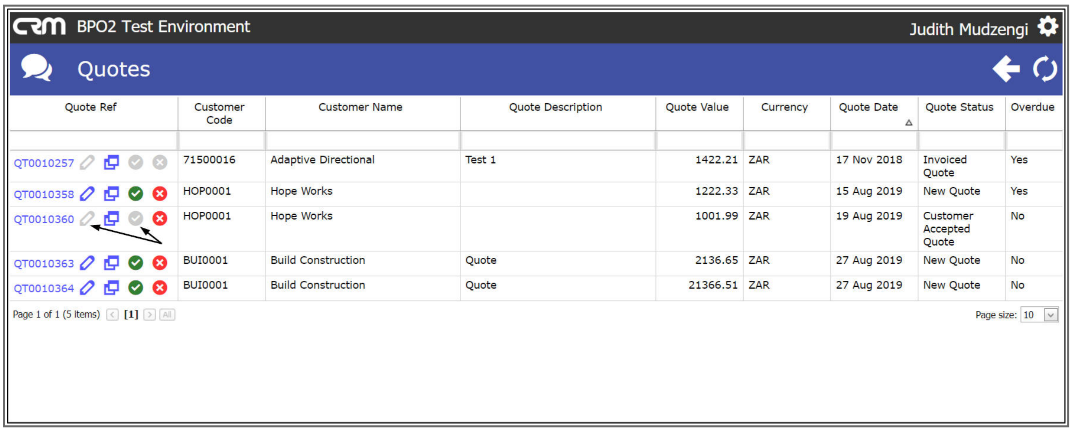
- Click on the **Mark Quote As Accepted** icon.



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

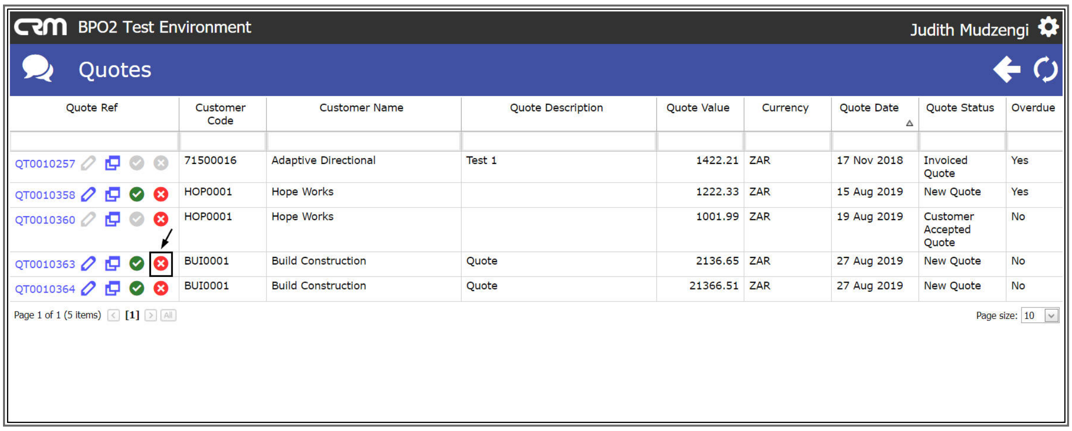


- The **Edit Quote icon** and **Mark Quote As Accepted icon** will become inactive (greyed out) when the quote is marked as accepted.



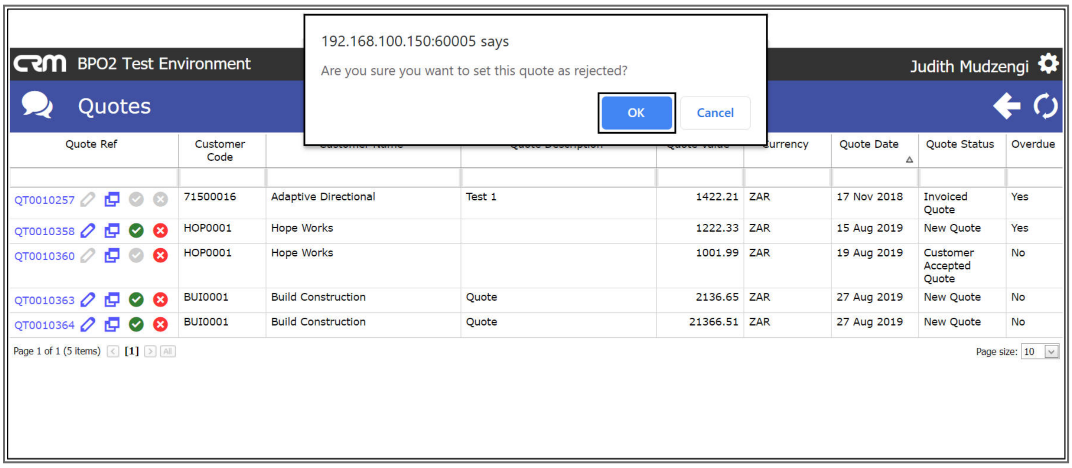
MARK QUOTE AS REJECTED

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

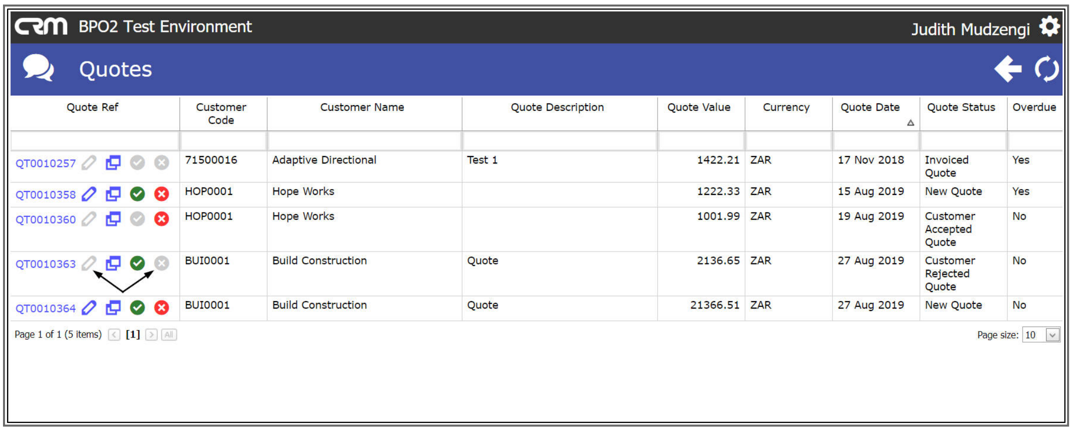


- A message box will pop up asking you;
  - **Are you sure you want to set this quote as rejected?**

- Click on **Ok**.

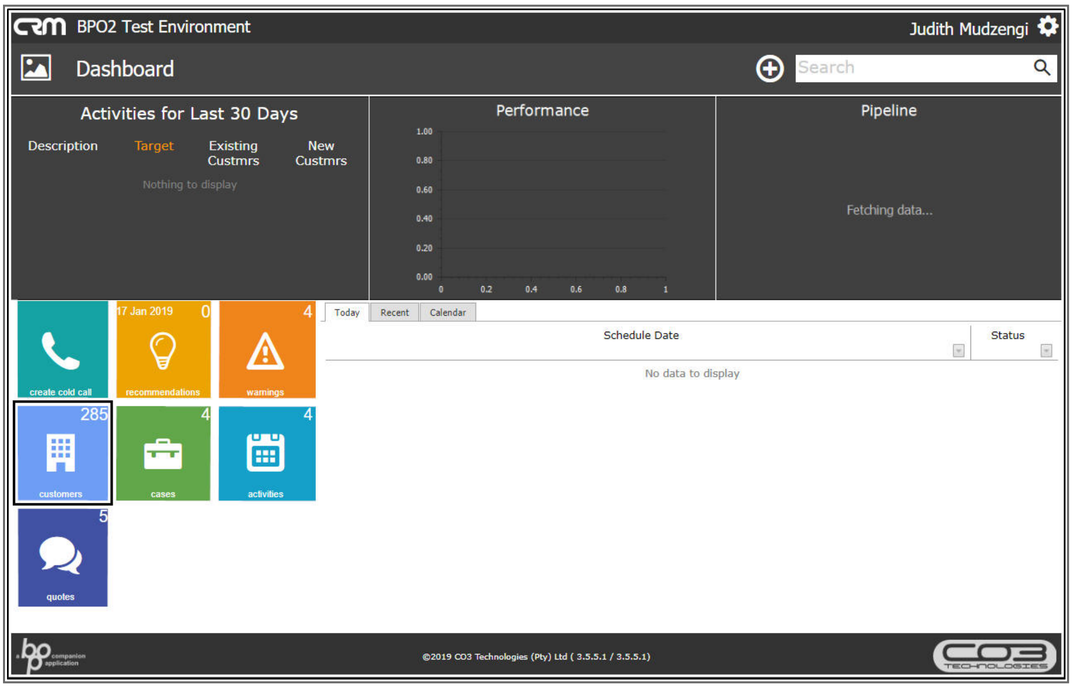


- The **Edit Quote icon** and **Mark Quote As Rejected icon** will become inactive (greyed out) when the quote is marked as rejected.

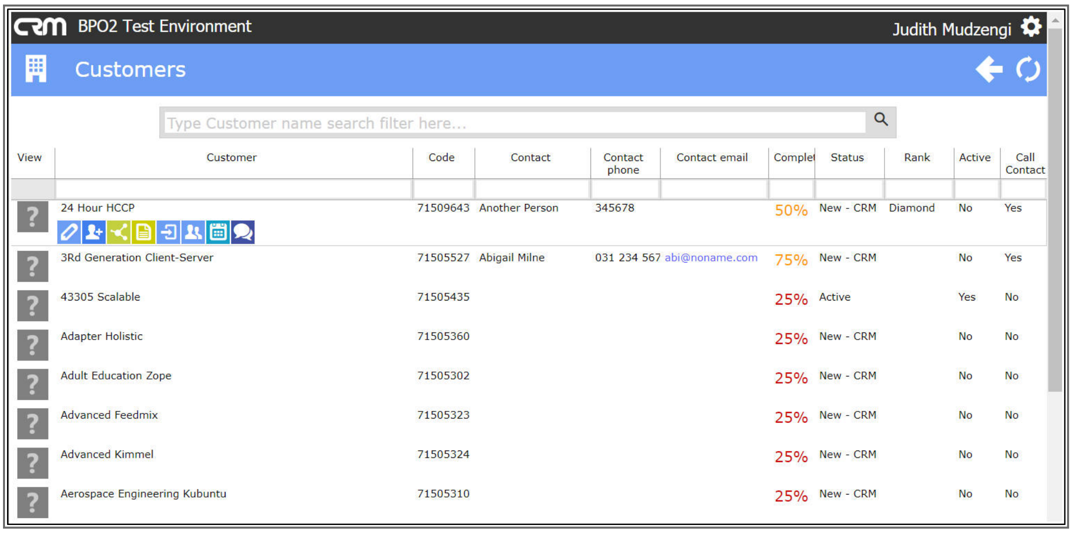


ACCESS CUSTOMER SPECIFIC QUOTES FROM HOME PAGE

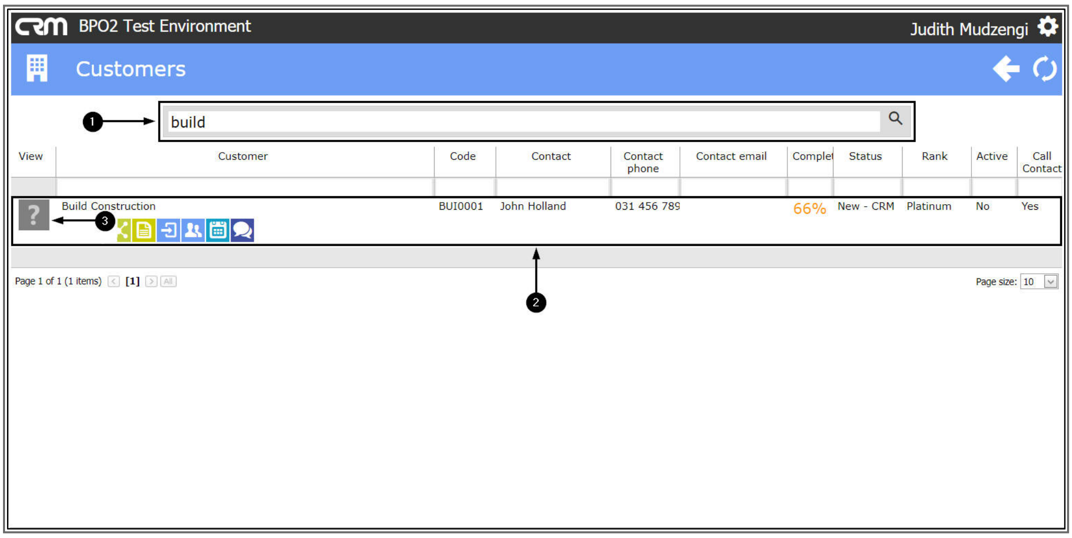
1. Click on the **Customers** tile in the **Home page** .



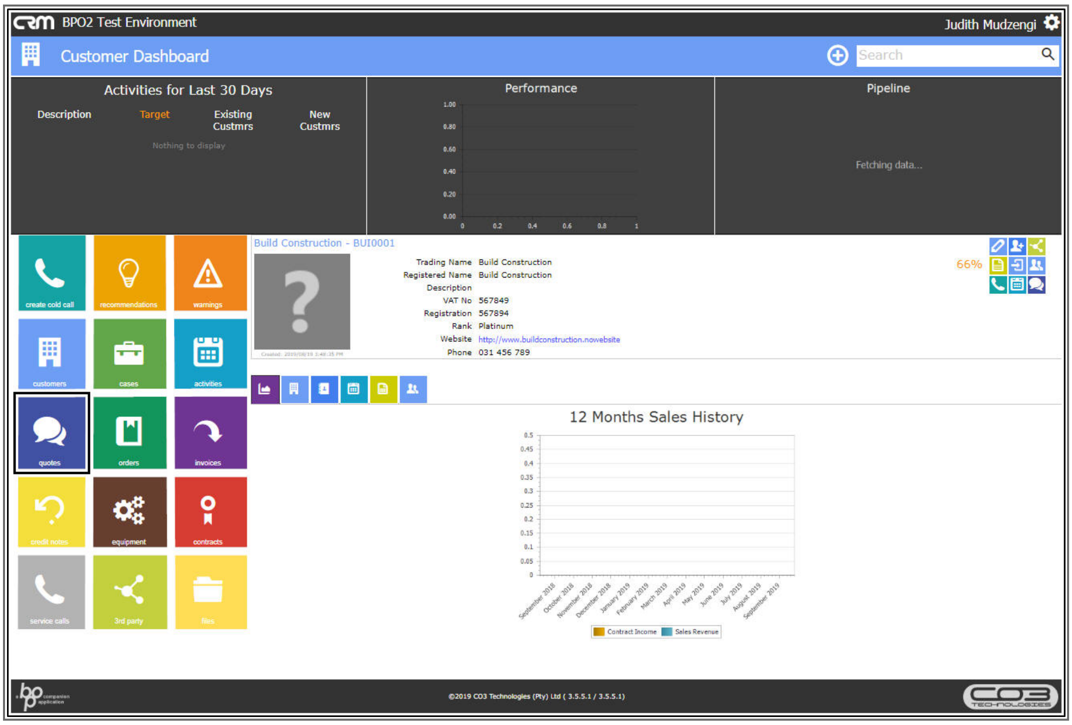
- The **Customers** listing page will open.
- All of the customers will be listed here.



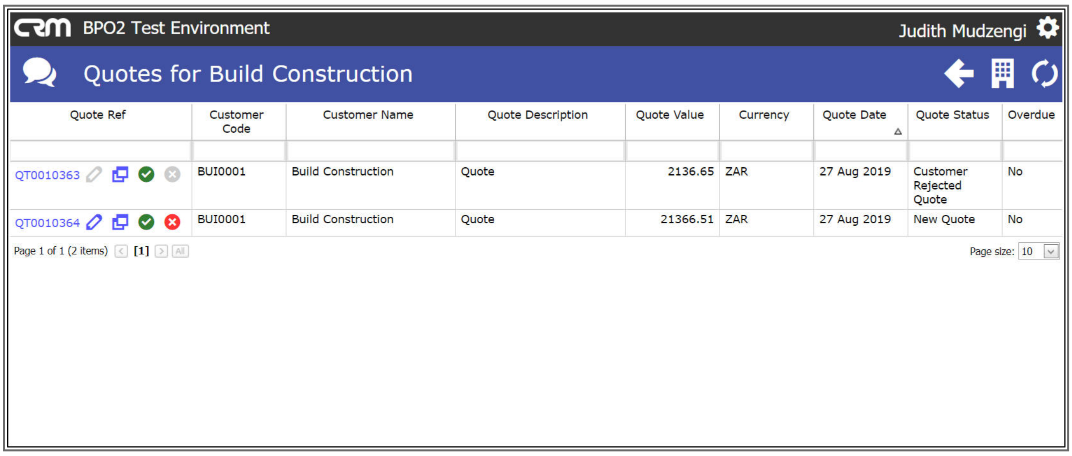
1. Type in the customer name you wish to access quotes for in the **Search** bar.
2. The system will filter for and display the customer in this page.
3. Click on the **View** icon.



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



- 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.



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