

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

## CRM CUSTOMERS

### QUOTES

Client-specific quotes can be accessed from the Customer Homepage as set out below.

A [full list of Quotes](#) (linked to you as a Salesman) can be accessed from the Homepage.

In CRM you have the ability to

- **View**
- **Edit**
- **Print**
- **Accept** and
- **Reject**

Quotes for your Customers.

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.

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**Ribbon Access:** Webpage > [http://\[servername\]:\[port-no\]/BPOCRM/User.aspx](http://[servername]:[port-no]/BPOCRM/User.aspx)

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## ACCESS CUSTOMER-SPECIFIC QUOTES FROM THE CUSTOMER HOMEPAGE

To access your customer-specific quotes, you will first need to navigate to the Customer Homepage.

1. In the **Homepage**,
2. Click on the **Customers** tile.

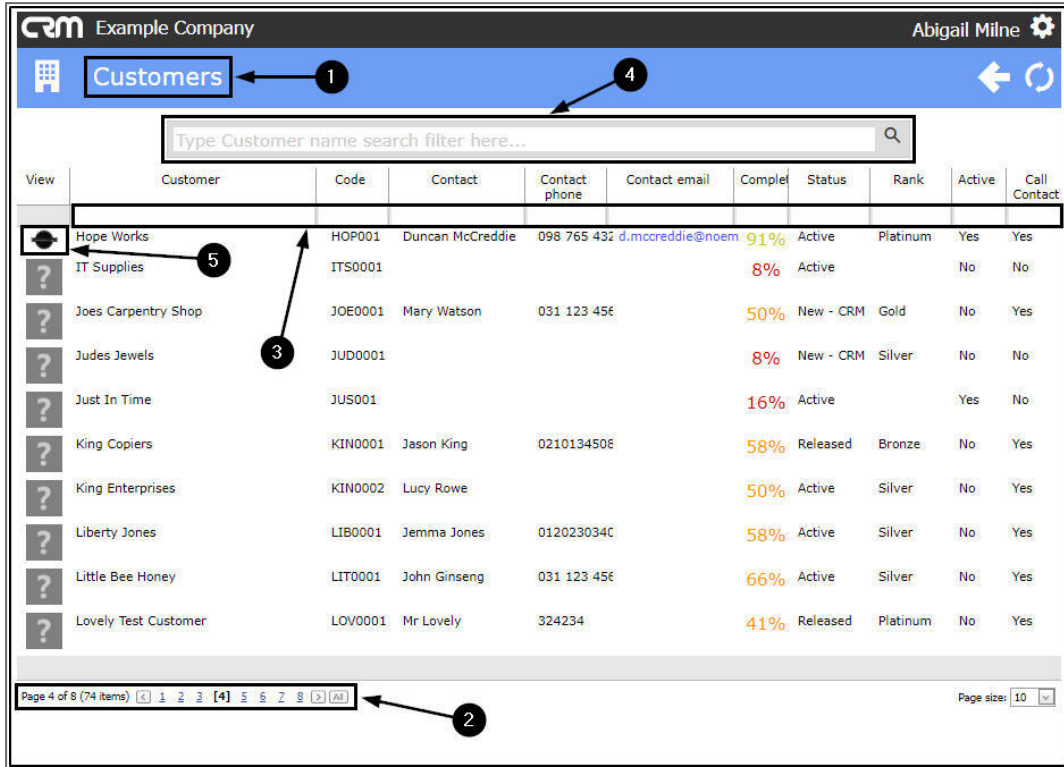
The screenshot shows the CRM Example Company dashboard for user Abigail Milne. The dashboard includes a navigation bar with a 'Dashboard' tab (marked with a blue circle and arrow '1') and a search bar. Below the navigation bar are three main sections: 'Activities for Last 30 Days', '1 Month Performance', and '4 Month Pipeline'. The 'Activities for Last 30 Days' section contains a table with the following data:

Description	Target	Existing Custmrs	New Custmrs
Phone call	20	3	2
Email	30	3	1
Meeting	20	0	2
On Site inspection	20	1	0
Site inspection	2	0	0

The '1 Month Performance' section shows a bar chart for Cases, Invoices, Orders, and Quotes. The '4 Month Pipeline' section shows a bar chart for Nov 2019, Dec 2019, Jan 2020, and Feb 2020. Below these sections is a grid of tiles: 'create cold call' (15 Oct 2019, 19), 'recommendations' (9), 'warnings' (9), 'customers' (75), 'cases' (8), 'activities' (7), 'quotes' (10), 'equipment' (147), and '3rd party' (8). A blue circle and arrow '2' points to the 'customers' tile. To the right of the grid is a 'Schedule Date' and 'Status' section with a 'No data to display' message. The footer contains the CO3 Technologies logo and version information: ©2019 CO3 Technologies (Pty) Ltd (3.5.6.0 / 3.5.6.0).

1. The **Customers** listing page will open.
2. You can use the **Page Reference field**,
3. the **Filter Row** or

- the **Filter Text Box** to **search** for your customer.
- Click on the selected **Customer icon** in the **View** column.



- The **Customer Homepage** will open.
- Click on the **Quotes** tile.

**CRM Example Company** Abigail Milne

**Hope Works** 1 Search

Description	Target	Existing Custmrs	New Custmrs
Phone call	20	3	2
Email	30	3	1
Meeting	20	0	2
On Site inspection	20	1	0
Site inspection	2	0	0

**1 Month Performance**

Bar chart showing performance for Cases, Invoices, Orders, and Quotes. Y-axis ranges from 0.00 to 70,000.00.

**4 Month Pipeline**

Bar chart showing pipeline for Nov 2019, Dec 2019, Jan 2020, and Feb 2020. Y-axis ranges from 0.00 to 6,000.00.

**Hope Works - HOP001**

Trading Name: Hope Works 91%  
Registered Name: Hope Works (Pty) Lts  
Description:  
VAT No: 987654321  
Registration: 123456789  
Rank: Platinum  
Website: <http://www.hopeworks.co.za>  
Phone: 031 123 4567

**12 Months Sales History**

Bar chart showing sales history from January 2018 to January 2019. Y-axis ranges from -400 to 0. Legend: Contract Income (yellow), Sales Revenue (blue).

1. 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).
2. You can use the **Page Reference field** or the
3. **Filter Row** to search for a particular Quote.

## VIEW / DOWNLOAD / PRINT CUSTOMER QUOTE

4. In the Quote Reference column, click on the blue **number** of the Quote that you wish to **View, Print, Download** or **Email** .

CRM Example Company Abigail Milne

**Quotes for Hope Works** ← 1 3

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000202	HOP001	Hope Works	toner	600.36	ZAR	17 Nov 2017	Order generated	Yes
QT0000203	HOP001	Hope Works	test	14073.30	ZAR	18 Dec 2017	Order generated	Yes
QT0000204	HOP001	Hope Works	1234	20932.74	ZAR	29 Jan 2018	Order generated	Yes
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	New quote	Yes
QT0000210	HOP001	Hope Works	HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000214	HOP001	Hope Works	HW/Q199	7436.62	ZAR	24 Oct 2019	New quote	Yes
QT0000217	HOP001	Hope Works	HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

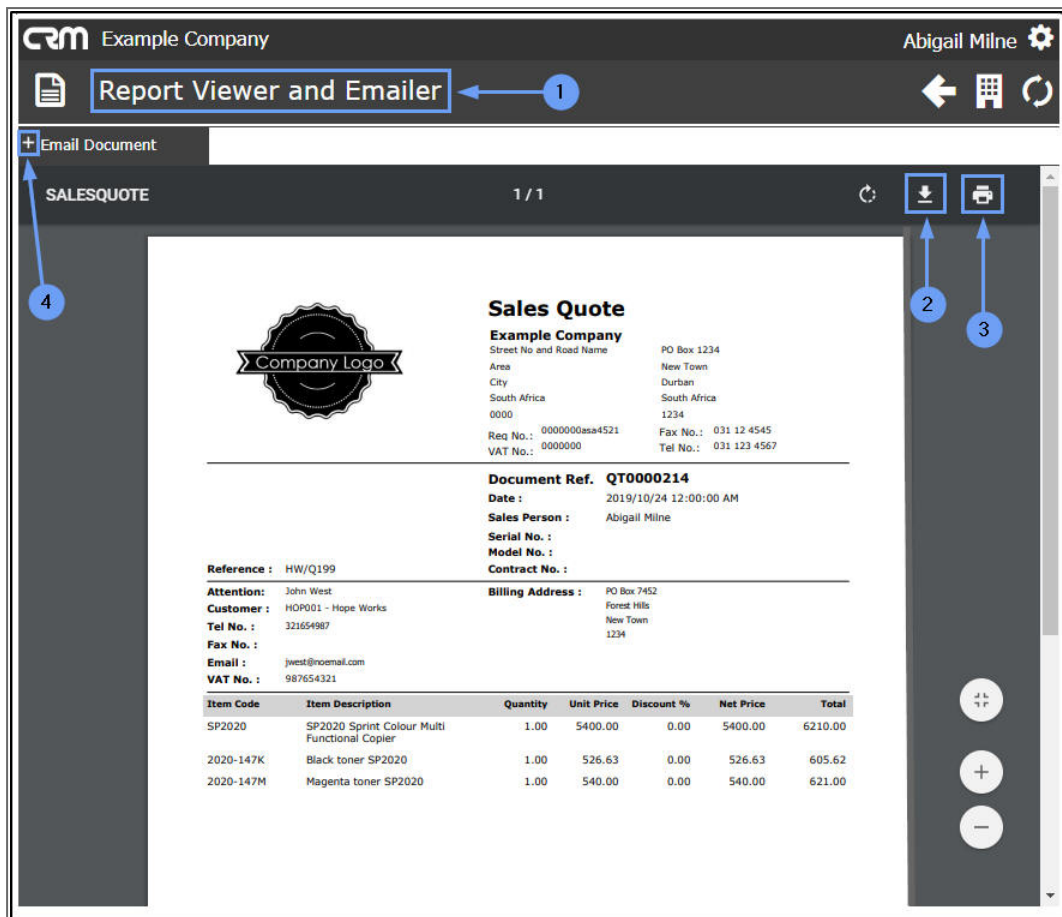
Page 10 of 10 (99 items) 1 2 3 4 5 6 7 8 9 [10] > [All] Page size: 10

2

1. The **Report Viewer and Emailer** page will open.
  - The selected Quote will be displayed.
2. Here you can **download** the Quote and/or
3. **Print** the Quote.

## EMAIL QUOTE

4. Click on the [ + ] sign on the **Email Document** tab.



1. The **Email Document** frame will be expanded.

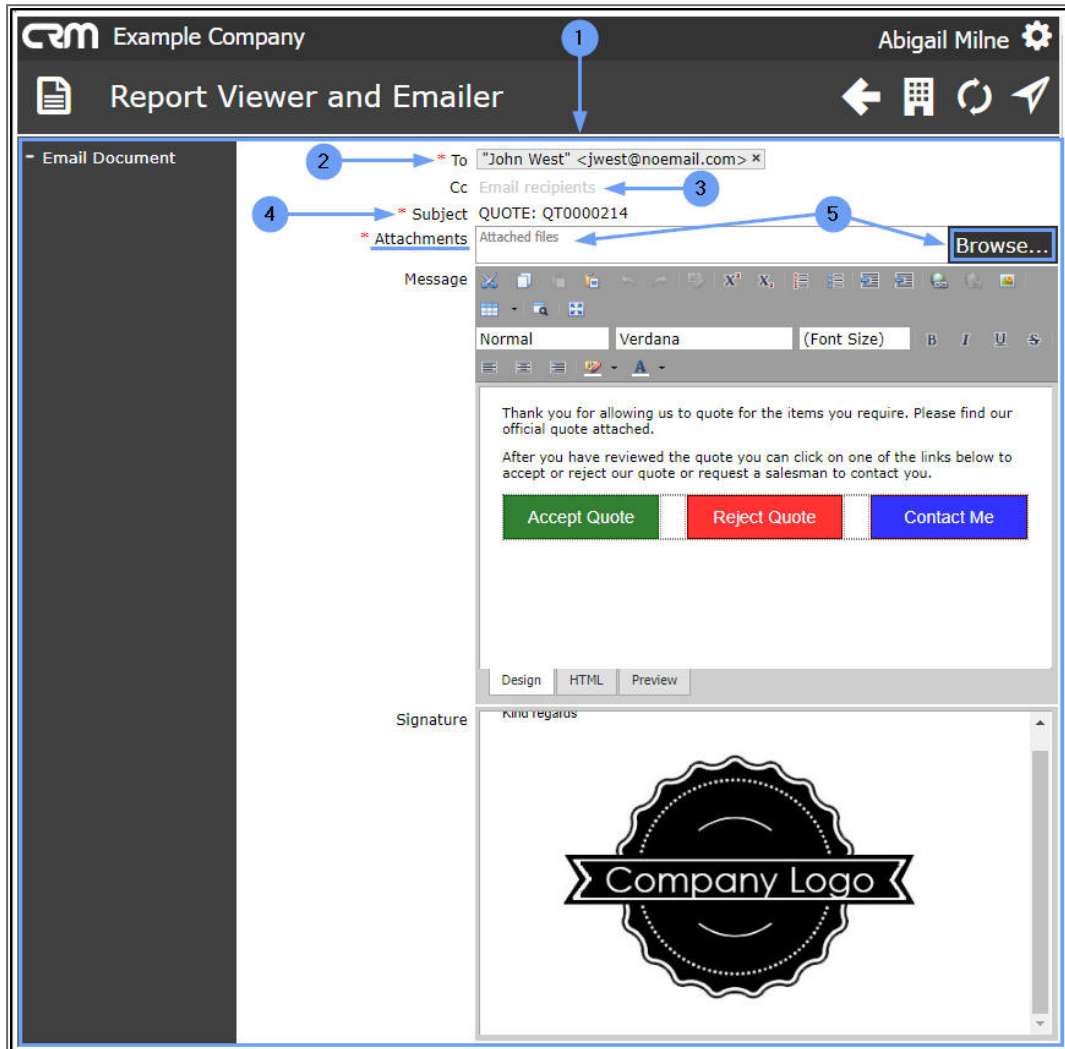
Check and/or add the following details, as necessary:

2. **To:** This will auto populate with the CRM contact for the Quote (case) but you can change this, if required.
3. **Cc:** Here, you can add other email recipients, if applicable.
  - Either click in the field and select customer contacts from the list, or type in additional addresses as noted above (separated by a semi-colon and a space).
4. **Subject:** This field will auto populate with the selected Quote number but you can edit this, if required.

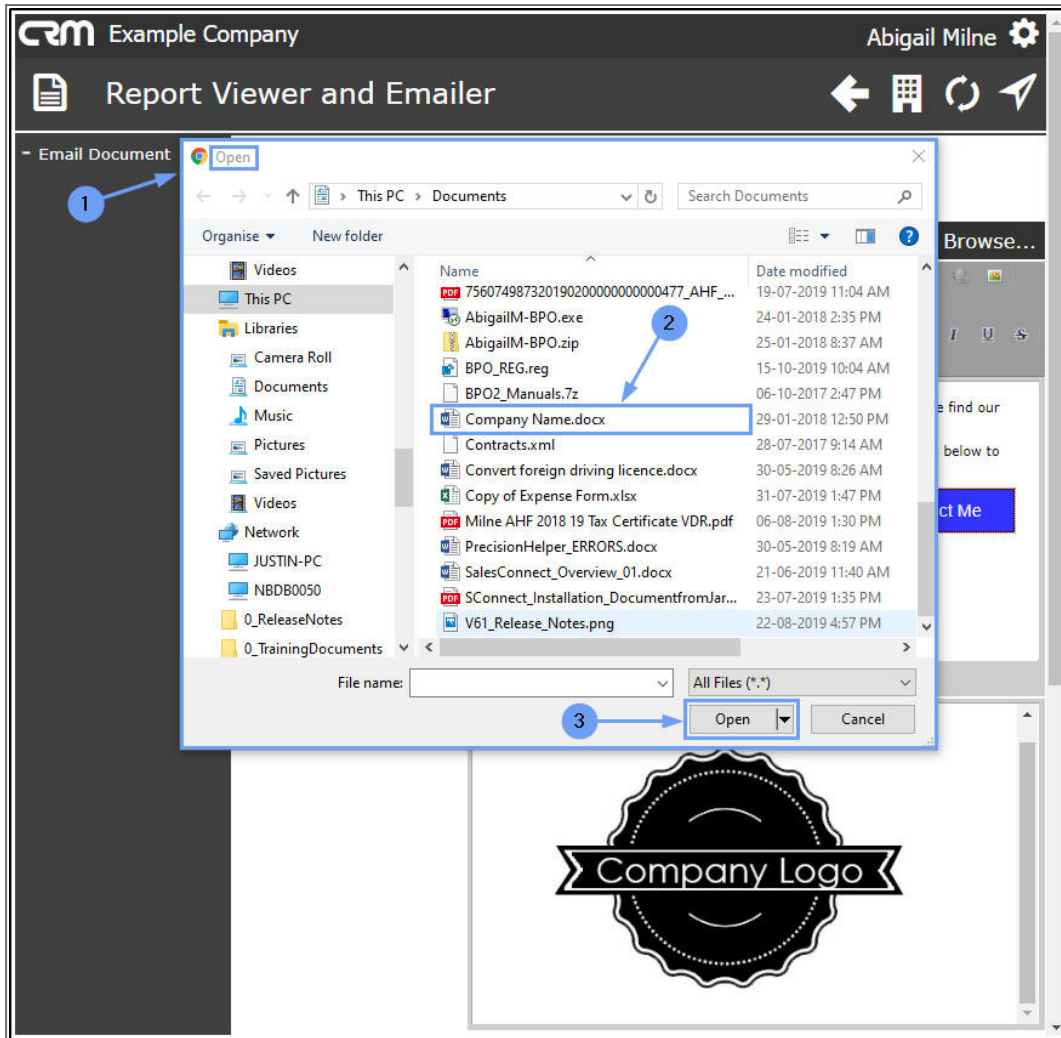
## ADD AN ATTACHMENT

You can add other documents, as attachments, if required.

5. **Attachments:** Click on **Browse**.

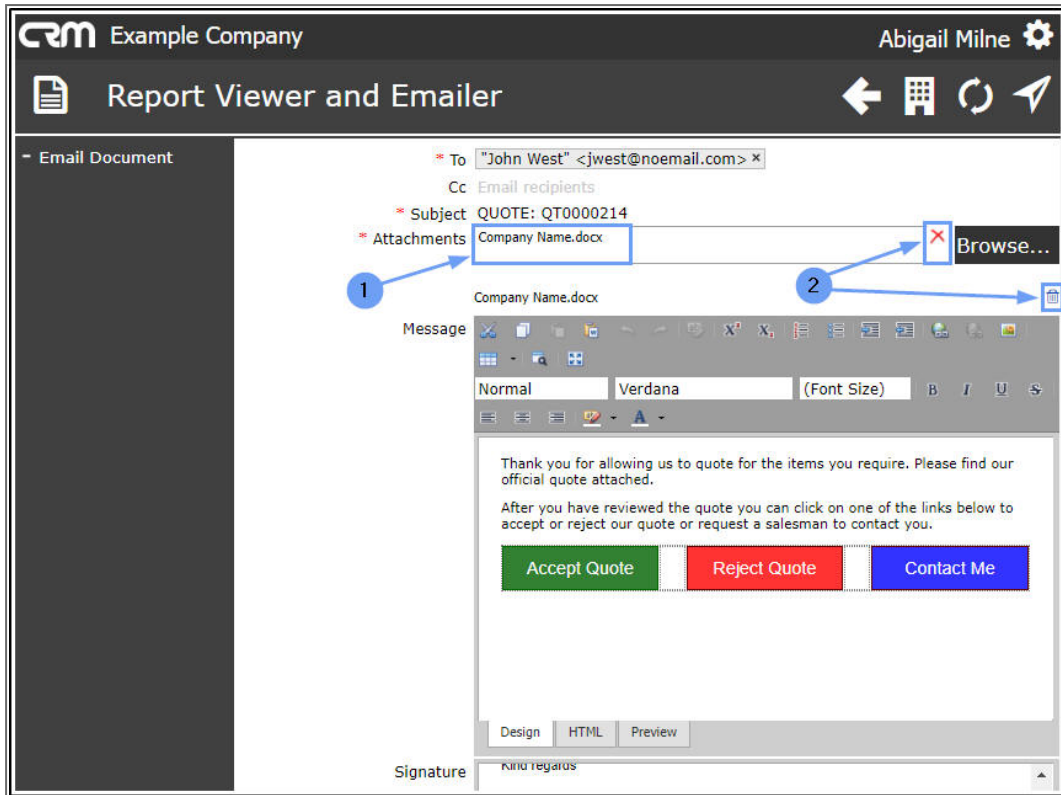


1. The **Open** screen will pop up.
2. Search for and select the file you wish to link.
3. Click on **Open**.



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





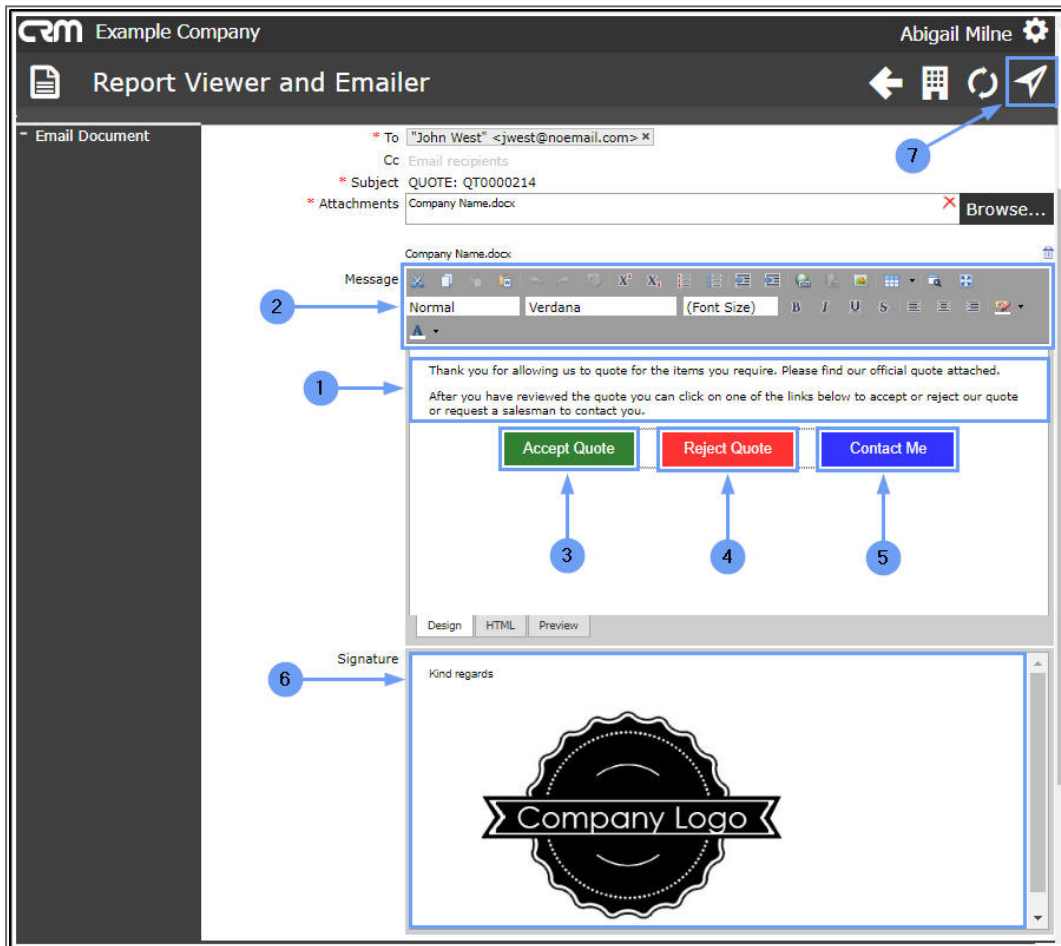
1. A default message will populate the **Message body** but this can be edited, if required.
  - Type in the relevant details in the message body.
2. The **Message tool bar** can be used to customise your email message.

## EMAIL ACTION BUTTONS

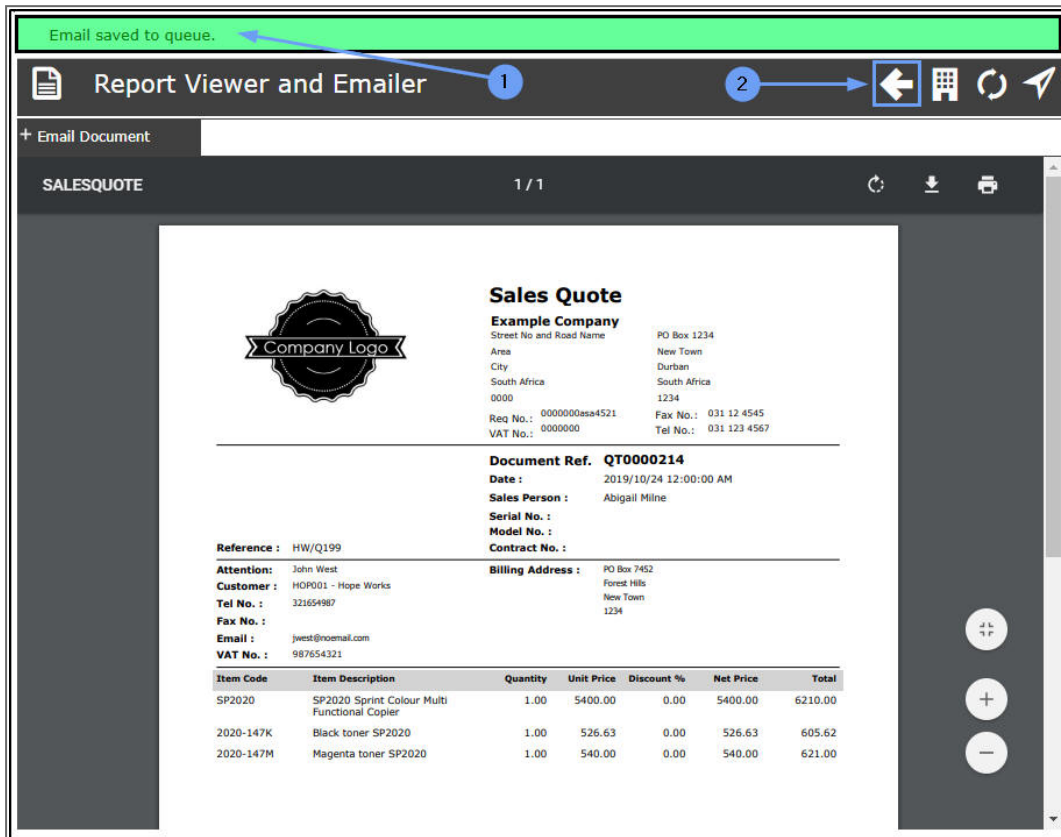
The message body contains 3 **Action** buttons that allow the recipient to:

3. **Accept Quote:** If the client selects Accept - the Quote Status will be updated and a quote status notification email will be sent to the salesman (where the Quote Status Notification email flag is set to Yes). The quote will automatically be **marked as accepted** in the **Quotes / Quotes for [ ]** screen.

4. **Reject Quote:** If the client selects Reject - the Quote Status will be updated and a quote status notification email will be sent to the salesman (where the Quote Status Notification email flag is set to Yes). The quote will automatically be **marked as rejected** in the **Quotes / Quotes for [ ]** screen.
5. **Contact Me:** If the client selects to be contacted - the Quote Status will remain unchanged. An email will be sent to the salesman requesting that they follow up with the client.
6. **Signature:** If you have a **Signature configured in CRM** - your Signature will pull through here, otherwise the **Company default CRM mail signature** will pull through.
7. Click on the **Send** icon.



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



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

## VIEW/ EDIT / DELETE QUOTE

Clicking on the **Edit** icon takes you to the **Save Quote** screen, where you can; **View, Edit, Delete** or **Copy** the Quote.

## VIEW QUOTE

2. Click on the **Edit icon** of the Quote that you wish to **view**.

CRM Example Company Abigail Milne

**Quotes for Hope Works**

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000202	HOP001	Hope Works	toner	600.36	ZAR	17 Nov 2017	Order generated	Yes
QT0000203	HOP001	Hope Works	test	14073.30	ZAR	18 Dec 2017	Order generated	Yes
QT0000204	HOP001	Hope Works	1234	20932.74	ZAR	29 Jan 2018	Order generated	Yes
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	New quote	Yes
QT0000210	HOP001	Hope Works	HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000214	HOP001	Hope Works	HW/Q199	7436.62	ZAR	24 Oct 2019	New quote	Yes
QT0000217	HOP001	Hope Works	HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

Page 10 of 10 (99 items) Page size: 10

1. The **Save Quote** page will open.
2. The **Quote**, **Quote Financials** and **Quote Items** frames will be auto expanded.
3. Click on the **expand** icon in the **Case** frame if you wish to view more case information.
4. Click on **View**.

CRM Example Company Abigail Milne

**Save Quote**

**Case** Subject: Potential sale of 5 machines.

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

\* Customer: Hope Works Date: 4 Nov 2019  
 \* Quote Contact: Stewart Hope \* Site: Durban  
 Quote Reference: QT0000217 \* Print Layout: HOP001\_SALESQUOTE  
 Reference: HWQ202  
 Comments: Customer requires on-site evaluation.

**Quote Financials**

\* Currency: South African Rand Quote Terms: Full Payment COD  
 Tax Rate: 15.00000 Commercial: Default  
 \* Exchange Rate: 1.0000

**Quote Items**

Add item Type to find items...  
 Add template Add sales template items

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	2.00	5610.67	5400.00	5400.00	10800.00		12420.00	
INVN	2020-147K	Black toner SP2020	1.00	481.70	526.63	526.63	526.63		605.62	
			3.00	6092.37	5926.63	5926.63	11326.63		13025.62	

Delete **View** Save Copy

1. The **Report Viewer and Emailer** page will open.

Here you can;

2. **Download** the Sales Quote.
3. **Print** the Sales Quote.
4. **Email** the Sales Quote.
5. Click on **Back** to return to the previous page.

**CRM Example Company** Abigail Milne ⚙️

**Report Viewer and Emailer** ← 1 5 →

+ Email Document

**SALESQUOTE** 1 / 1 🔄 ⬇️ 🖨️

**Sales Quote**

**Example Company**  
 Street No and Road Name: PO Box 1234  
 Area: New Town  
 City: Durban  
 South Africa: South Africa  
 0000: 1234  
 Reg No.: 0000000asa4521 Fax No.: 031 12 4545  
 VAT No.: 0000000 Tel No.: 031 123 4567

**Document Ref. QT0000217**  
**Date:** 2019/11/04 12:00:00 AM  
**Sales Person:** Abigail Milne  
**Serial No.:**  
**Model No.:**  
**Contract No.:**

**Reference:** HWQ202  
**Attention:** Stewart Hope  
**Customer:** HOP001 - Hope Works  
**Tel No.:** 031 123 4567  
**Fax No.:**  
**Email:** standard@noemail.co.za  
**VAT No.:** 987654321

**Billing Address:** PO Box 7452  
 Forest Hills  
 New Town  
 1234

Item Code	Item Description	Quantity	Unit Price	Discount %	Net Price	Total
SP2020	SP2020 Sprint Colour Multi Functional Copier	2.00	5400.00	0.00	10800.00	12420.00
2020-147K	Black toner SP2020	1.00	526.63	0.00	526.63	605.62

Customer requires on-site evaluation.		<b>Sub Total</b>	ZAR 11326.63
		<b>VAT</b>	ZAR 1698.99
		<b>Total</b>	ZAR 13025.62

dd / mm / yyyy bh : mm

## EDIT QUOTE

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You can edit some of the details in this **Save Quote** page.

## EDIT THE CASE FRAME

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1. **Expand** the Case frame to view all the information.
2. None of the details in this frame can be edited.

## EDIT THE QUOTE FRAME

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3. Some of the details in the **Quotes** frame can be edited:
  - **Customer:** This will auto populate. This field cannot be edited.
  - **Quote Contact:** This will auto populate.
    - You can click on the **drop-down arrow** and select from the list, an alternative contact, if required.
  - **Quote Reference:** This will auto populate with the quote number. This field cannot be edited.
  - **Reference:** This will auto populate but you can edit this, if required.
  - **Comments:** This will auto populate but you can add to or edit the text, if required.
  - **Date:** This will auto populate.
    - You can click on the **drop-down arrow** and select from the list, an alternative date, if required.
  - **Site:** This will auto populate. This field cannot be edited.
  - **Print Layout:** This will auto populate.

- You can click on the **drop-down arrow** and select from the list, an alternative layout, if required and if there are alternatives set up on your CRM.

**Case**

Customer: Hope Works  
 Contact: Stewart Hope  
 Subject: Potential sale of 5 machines.  
 Case Information: Customer opening new premises

**Quote**

\* A quote will only be created if you add quote line items.  
 \* Customer: Hope Works  
 \* Quote Contact: Stewart Hope  
 Quote Reference: QT0000217  
 Reference: HWQ202  
 Comments: Customer requires on-site evaluation.  
 Date: 4 Nov 2019  
 \* Site: Durban  
 \* Print Layout: HOP001\_SALESQUOTE

**Quote Financials**

\* Currency: South African Rand  
 Tax Rate: 15.00000  
 \* Exchange Rate: 1.0000  
 Quote Terms: Full Payment COD  
 Commercial: Default

**Quote Items**

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	2.00	5610.67	5400.00	5400.00	10800.00		12420.00	
INVN	2020-147K	Black toner SP2020	1.00	481.70	526.63	526.63	526.63		605.62	
			3.00	6092.37	5926.63	5926.63	11326.63		13025.62	

Buttons: Delete, View, Save, Copy

## EDIT THE QUOTE FINANCIALS FRAME

- Some of the details in the **Quote Financials** frame can be edited:
  - Currency:** This will auto populate. This field cannot be edited.
  - Tax Rate:** This will auto populate. This field cannot be edited.
  - Exchange Rate:** This will auto populate.
    - You can delete the current exchange rate and type in the new exchange rate, if required.

- **Quote Terms:** This will auto populate.
  - You can click on the **drop-down arrow** and select alternative payment terms, if required.
- **Commercial:** This will auto populate.
  - You can click on the **drop-down arrow** and select an alternative **commercial**, required.

**CRM Example Company** Abigail Milne

**Save Quote**

**- Case**  
 Customer: Hope Works  
 Contact: Stewart Hope  
 Subject: Potential sale of 5 machines.  
 Case Information: Customer opening new premises

**- Quote**  
 \* A quote will only be created if you add quote line items.  
 \* Customer: Hope Works  
 \* Quote Contact: Stewart Hope  
 Quote Reference: QT0000217  
 Reference: HWQ202  
 Comments: Customer requires on-site evaluation.  
 Date: 4 Nov 2019  
 \* Site: Durban  
 \* Print Layout: SALESQUOTE

**- Quote Financials** (highlighted with red box and circle 1)  
 \* Currency: South African Rand  
 Tax Rate: 15.00000  
 \* Exchange Rate: 1.0000  
 Quote Terms: Full Payment COD  
 Commercial: Default

**- Quote Items**

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	2.00	5610.67	5400.00	5400.00	10800.00		12420.00	
INVN	2020-147K	Black toner SP2020	1.00	481.70	526.63	526.63	526.63		605.62	
			3.00	6092.37	5926.63	5926.63	11326.63		13025.62	

Buttons: Delete, View, Save, Copy

## EDIT THE QUOTE ITEMS FRAME

Some of the details in the **Quote Financials** frame can be edited:

1. You can **add more Quote items**, if required.
2. You can **edit the existing Quote items**, if required.
3. You can **delete the existing Quote items**, if required.



CRM Example Company
Abigail Milne

Save Quote

Case

Customer: Hope Works  
 Contact: Stewart Hope  
 Subject: Potential sale of 5 machines.  
 Case Information: Customer opening new premises

Quote

\* A quote will only be created if you add quote line items.  
 \* Customer: Hope Works  
 \* Quote Contact: Stewart Hope  
 Quote Reference: QT0000217  
 Reference: HWQ202  
 Comments: Customer requires on-site evaluation.  
 Date: 4 Nov 2019  
 \* Site: Durban  
 \* Print Layout: SALESQUOTE

Quote Financials

\* Currency: South African Rand  
 Tax Rate: 15.00000  
 Exchange Rate: 1.0000  
 Quote Terms: Full Payment COD  
 Commercial: Default

Quote Items

1 Add item   
2 Add template

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	2.00	5610.67	5400.00	5400.00	10800.00		12420.00	
INVN	2020-147K	Black toner SP2020	1.00	481.70	526.63	526.63	526.63		605.62	
			3.00	6092.37	5926.63	5926.63	11326.63		13025.62	

Delete
 View
 Save
 Copy

## SAVE QUOTE CHANGES

When you have finished editing the Quote details, either click on the

1. **Save** button

Or the

2. **Save** icon to keep your changes.

CRM Example Company
Abigail Milne

Save Quote

Case

Customer: Hope Works  
 Contact: Stewart Hope  
 Subject: Potential sale of 5 machines.  
 Case Information: Customer opening new premises

Quote

\* A quote will only be created if you add quote line items.  
 \* Customer: Hope Works  
 \* Quote Contact: Stewart Hope  
 Quote Reference: QT0000217  
 Reference: HWQ202  
 Comments: Customer requires on-site evaluation.  
 Date: 4 Nov 2019  
 \* Site: Durban  
 \* Print Layout: SALESQUOTE

Quote Financials

\* Currency: South African Rand  
 Tax Rate: 15.00000  
 \* Exchange Rate: 1.0000  
 Quote Terms: Full Payment COD  
 Commercial: Default

Quote Items

Add item Type to find items...  
 Add template Add sales template items

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	2.00	5610.67	5400.00	5400.00	10800.00		12420.00	
INVN	2020-147K	Black toner SP2020	1.00	481.70	526.63	526.63	526.63		605.62	
			3.00	6092.37	5926.63	5926.63	11326.63		13025.62	

Delete
 View
 Save 1
 Copy

1. A message will pop up informing you that;

- **Quote saved successfully.**

In this **Save Quote** page, you can also select to

2. **Copy** (Clone) this Quote or
3. **Delete** this Quote.
4. Click on **Back** to return to the previous page.

Quote saved successfully.

**Save Quote**

**Case** Subject: Potential sale of 5 machines.

**Quote**

- \* A quote will only be created if you add quote line items.
- \* Customer: Hope Works
- \* Quote Contact: Stewart Hope
- Quote Reference: QT0000217
- Reference: HWQ202
- Comments: Customer requires on-site evaluation.
- Date: 4 Nov 2019
- \* Site: Durban
- \* Print Layout: HOP001\_SALESQUOTE

**Quote Financials**

- \* Currency: South African Rand
- Tax Rate: 15.00000
- \* Exchange Rate: 1.0000
- Quote Terms: Full Payment COD
- Commercial: Default

**Quote Items**

Add item + Add template + Type to find items... Add sales template items

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	2.00	5610.67	5400.00	5400.00	10800.00		12420.00	
INVN	2020-147K	Black toner SP2020	1.00	481.70	526.63	526.63	526.63		605.62	
			3.00	6092.37	5926.63	5926.63	11326.63		13025.62	

**3** **View** **Save** **2**

## CREATE COPY (CLONE) OF QUOTE

(from the **Quotes for [selected customer]** page)

1. In the **Quotes for [selected customer]** page,
2. Click on the **Create Copy of Quote** icon next to the Quote that is to be copied.

CRM Example Company Abigail Milne

**Quotes for Hope Works** ← [Grid] [Refresh]

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000202	HOP001	Hope Works	toner	600.36	ZAR	17 Nov 2017	Order generated	Yes
QT0000203	HOP001	Hope Works	test	14073.30	ZAR	18 Dec 2017	Order generated	Yes
QT0000204	HOP001	Hope Works	1234	20932.74	ZAR	29 Jan 2018	Order generated	Yes
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	New quote	Yes
QT0000210	HOP001	Hope Works	HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000214	HOP001	Hope Works	HW/Q199	7436.62	ZAR	24 Oct 2019	New quote	Yes
QT0000217	HOP001	Hope Works	HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

Page 10 of 10 (59 items) [1] [2] [3] [4] [5] [6] [7] [8] [9] [10] [All] Page size: 10

- The **Create Copy of Quote** [selected quote number] page will open.
  - Follow the process to **copy (clone) this quote**, if required.
- Or click on **Back** to return to the **Quotes for** [selected customer] page.

CRM Example Company Abigail Milne

**Create Copy of Quote QT0000209** ← [Grid] [Print]

Customer	* Customer for New Quote: Hope Works
Quote Financials	Keep Prices <input type="checkbox"/> Keep the prices from the original quote.
Case	Related Case: Not linked to a case

[Create Copy](#)

## MARK QUOTE AS ACCEPTED

1. In the **Quotes for [selected customer]** page,
2. Click on the **Mark as Accepted** icon next to the Quote that is to be accepted.
3. You will note that the **Quote Status** is currently 'New Quote'.

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000202	HOP001	Hope Works	toner	600.36	ZAR	17 Nov 2017	Order generated	Yes
QT0000203	HOP001	Hope Works	test	14073.30	ZAR	18 Dec 2017	Order generated	Yes
QT0000204	HOP001	Hope Works	1234	20932.74	ZAR	29 Jan 2018	Order generated	Yes
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	New quote	Yes
QT0000210	HOP001	Hope Works	HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000214	HOP001	Hope Works	HW/Q199	7436.62	ZAR	24 Oct 2019	New quote	Yes
QT0000217	HOP001	Hope Works	HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

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

localhost:50000 says  
Are you sure you want to set this quote as accepted?

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000202	HOP001	Hope Works	toner	600.36	ZAR	17 Nov 2017	Order generated	Yes
QT0000203	HOP001	Hope Works	test	14073.30	ZAR	18 Dec 2017	Order generated	Yes
QT0000204	HOP001	Hope Works	1234	20932.74	ZAR	29 Jan 2018	Order generated	Yes
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	New quote	Yes
QT0000210	HOP001	Hope Works	HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000214	HOP001	Hope Works	HW/Q199	7436.62	ZAR	24 Oct 2019	New quote	Yes
QT0000217	HOP001	Hope Works	HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

1. The **Quote Status** will change to '**Accepted Quote**'.
2. The **Mark as Accepted** icon will become inactive (greyed out).
3. The **Edit** icon will become inactive (greyed out) as '**Accepted**' quotes cannot be edited.

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000202	HOP001	Hope Works	toner	600.36	ZAR	17 Nov 2017	Order generated	Yes
QT0000203	HOP001	Hope Works	test	14073.30	ZAR	18 Dec 2017	Order generated	Yes
QT0000204	HOP001	Hope Works	1234	20932.74	ZAR	29 Jan 2018	Order generated	Yes
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	Accepted quote	Yes
QT0000210	HOP001	Hope Works	HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000214	HOP001	Hope Works	HW/Q199	7436.62	ZAR	24 Oct 2019	New quote	Yes
QT0000217	HOP001	Hope Works	HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

## MARK QUOTE AS REJECTED

1. In the **Quotes for [selected customer]** page,
2. Click on the **Mark as Rejected** icon next to the Quote that is to be rejected.
3. You will note that the **Quote Status** is currently 'New Quote'.

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000202	HOP001	Hope Works	toner	600.36	ZAR	17 Nov 2017	Order generated	Yes
QT0000203	HOP001	Hope Works	test	14073.30	ZAR	18 Dec 2017	Order generated	Yes
QT0000204	HOP001	Hope Works	1234	20932.74	ZAR	29 Jan 2018	Order generated	Yes
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	Accepted quote	Yes
QT0000210	HOP001	Hope Works	HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000214	HOP001	Hope Works	HW/Q199	7436.62	ZAR	24 Oct 2019	New quote	Yes
QT0000217	HOP001	Hope Works	HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

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

localhost:50000 says  
Are you sure you want to set this quote as rejected?

OK Cancel

Quote Ref	Customer Code	Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000202	HOP001	Hope Works toner	600.36	ZAR	17 Nov 2017	Order generated	Yes
QT0000203	HOP001	Hope Works test	14073.30	ZAR	18 Dec 2017	Order generated	Yes
QT0000204	HOP001	Hope Works 1234	20932.74	ZAR	29 Jan 2018	Order generated	Yes
QT0000206	HOP001	Hope Works HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works Q9001	506.00	ZAR	25 Feb 2019	Accepted quote	Yes
QT0000210	HOP001	Hope Works HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000214	HOP001	Hope Works HW/Q199	7436.62	ZAR	24 Oct 2019	New quote	Yes
QT0000217	HOP001	Hope Works HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

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1. The **Quote Status** will change to '**Rejected Quote**'.
2. The **Mark as Rejected** icon will become inactive (greyed out).
3. The **Edit** icon will become inactive (greyed out) as 'Rejected' quotes can  
not be edited.

Example Company Abigail Milne

Quotes for Hope Works

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000202	HOP001	Hope Works	toner	600.36	ZAR	17 Nov 2017	Order generated	Yes
QT0000203	HOP001	Hope Works	test	14073.30	ZAR	18 Dec 2017	Order generated	Yes
QT0000204	HOP001	Hope Works	1234	20932.74	ZAR	29 Jan 2018	Order generated	Yes
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	Accepted quote	Yes
QT0000210	HOP001	Hope Works	HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000214	HOP001	Hope Works	HW/Q199	7436.62	ZAR	24 Oct 2019	Rejected quote	Yes
QT0000217	HOP001	Hope Works	HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

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## **ACCESS THE FULL LIST OF QUOTES FROM THE DASHBOARD (HOME PAGE)**

To access the full list of all the quotes linked to you as a Salesman, you must navigate from the Dashboard.

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

The screenshot shows the CRM Dashboard for 'Example Company' with user 'Abigail Milne'. The dashboard includes a navigation menu with 'Dashboard' selected, a search bar, and several performance charts. A grid of activity tiles is visible, with the 'quotes' tile highlighted. The 'quotes' tile shows a count of 10. Other tiles include 'create cold call' (19), 'recommendations' (8), 'warnings' (7), 'customers' (75), 'cases' (8), 'activities' (7), 'equipment' (147), and '3rd party' (8). The 'quotes' tile is also labeled with a circled '10' and an arrow pointing to it from the text '1' in the instructions above.

Description	Target	Existing Custmrs	New Custmrs
Phone call	20	2	2
Email	30	2	1
Meeting	20	0	2
On Site inspection	20	1	0
Site inspection	2	0	0

- The **Quotes** listing page will open.
- A list of New, Accepted or Rejected Quotes for all customers on the system, where you are the Salesman, will be displayed.
- For more information refer to [CRM Basics: Quotes](#).

CRM Example Company Abigail Milne

**Quotes** 1

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	Accepted quote	Yes
QT0000210	HOP001	Hope Works	HWQ00444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000211	KIN0002	King Enterprises	Q/KE/001	6815.62	ZAR	19 Jul 2019	Accepted quote	Yes
QT0000212	KIN0001	King Copiers	Q/KC/9002	13025.62	ZAR	30 Jul 2019	New quote	Yes
QT0000213	TRA0001	Training Wheels	TW001	31050.00	ZAR	14 Oct 2019	Accepted quote	Yes
QT0000214	HOP001	Hope Works	HW/Q199	7436.62	ZAR	24 Oct 2019	Rejected quote	Yes
QT0000215	KIN0001	King Copiers	KCQU101	13025.62	ZAR	31 Oct 2019	New quote	No
QT0000217	HOP001	Hope Works	HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

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