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

CRM BASICS

ADDING / EDITING / DELETING QUOTES

Adding Quotes in CRM, will also create the quote in BPO as a **New Quote**.

This new quote will need to be emailed to the client. This email include links to either:

- **Accept** or
- **Reject** the Quote

or to have the salesman:

- **Contact Me**

regarding the Quote.

Once Accepted (or Rejected), a quote can no longer be edited.

-

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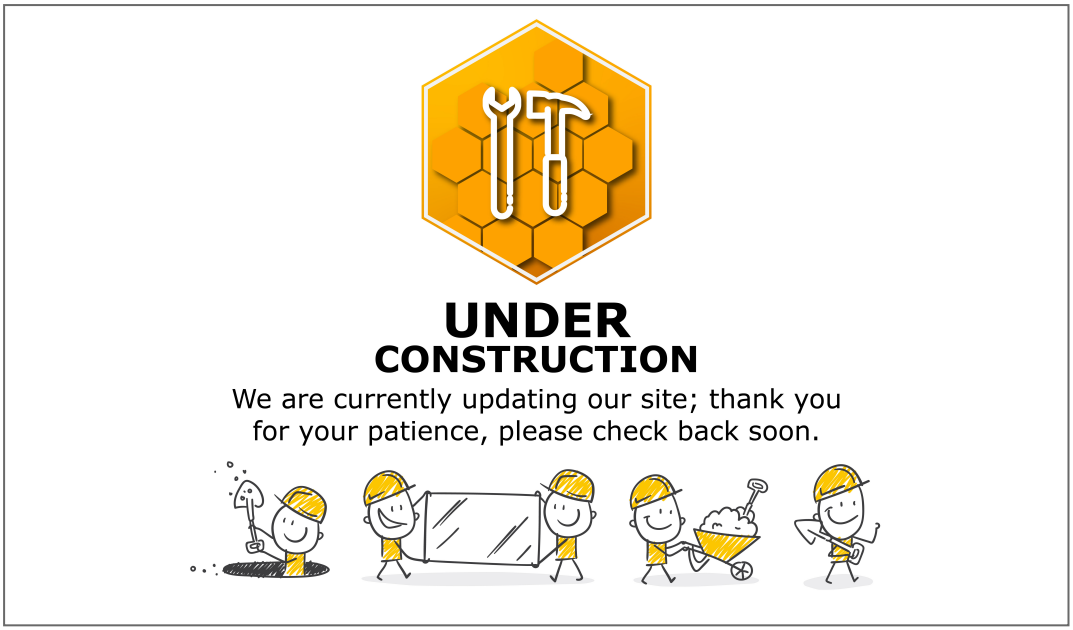
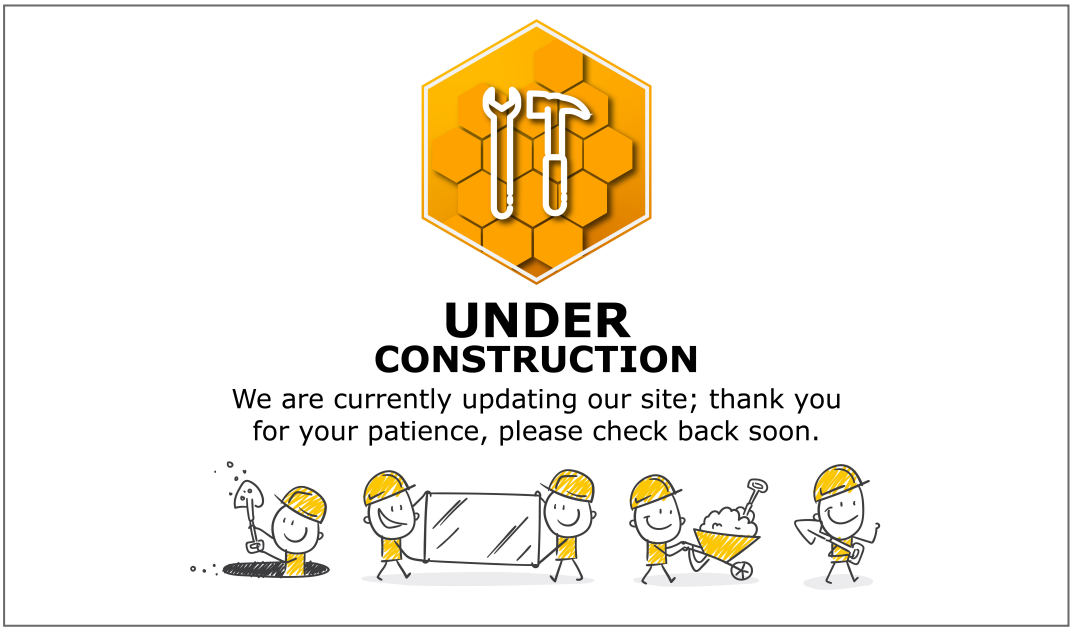


Quotes can be added when: creating a new case or editing a case , adding or editing an activity, or from the Customer-specific Cases listing page and the Customer-specific Activities listing page.

ADD A NEW QUOTE WHEN CREATING A CASE...??



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ADD A NEW QUOTE WHEN EDITING A CASE

1. In the Dashboard,
2. Click on the Cases tile.

1. The My Cases page will open.
2. Hover over a selected case to reveal the Action buttons.
3. Click on either the View Case Info and History button or the View/Edit this Case button.
    - (Either of these buttons will direct you to the Save Case page where you can add a new quote.)

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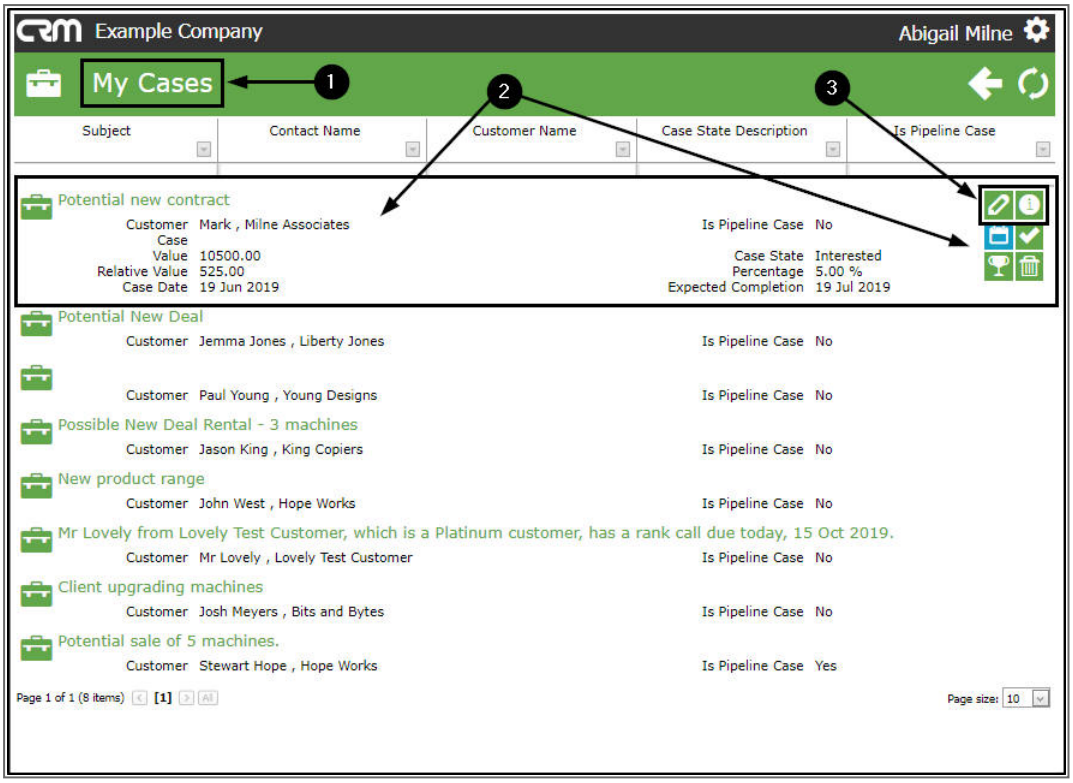

1. The **Save Case** page will open.
2. Expand the **Quote** frame.

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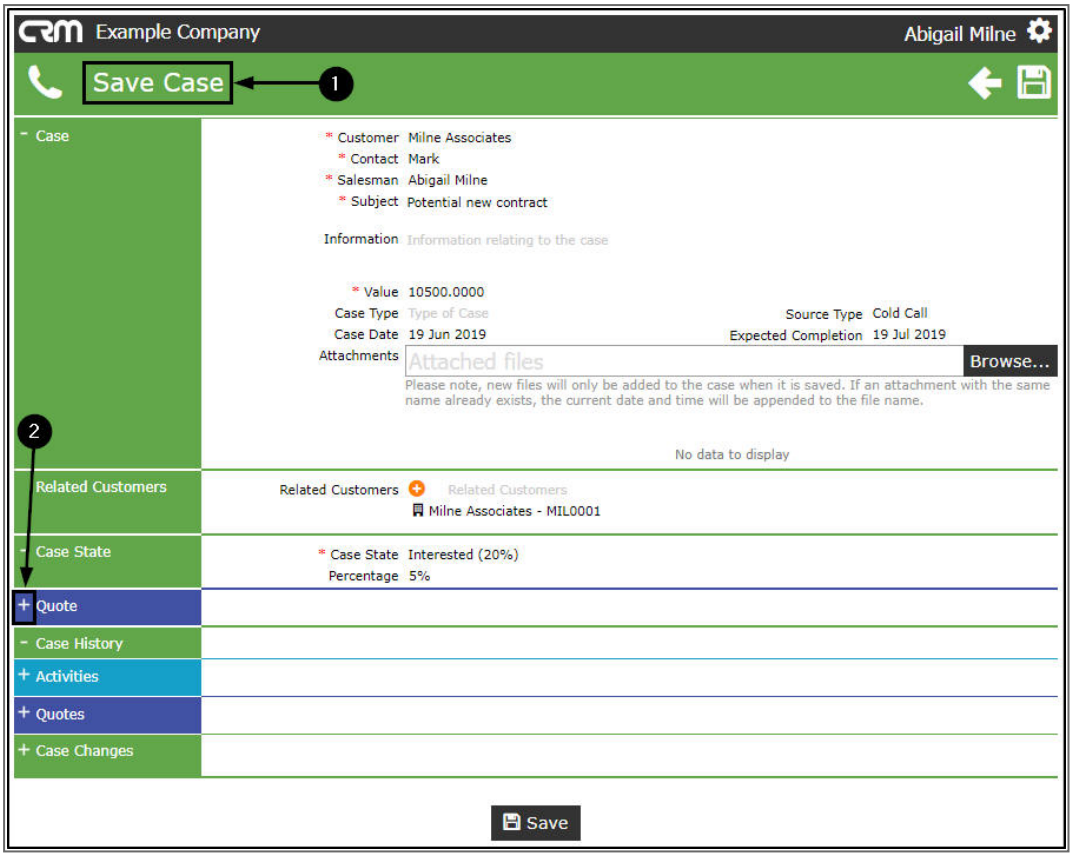

1. The Quote, Quote Financials, Add Quote Items and Quote Items frames will be expanded.
    - Ensure that you have filled in any mandatory fields [*] and then follow the Link Quote Process to create the new quote.
2. Either click on **Save** to keep the changes or
3. Click on **Back** to return to the My Cases Screen.

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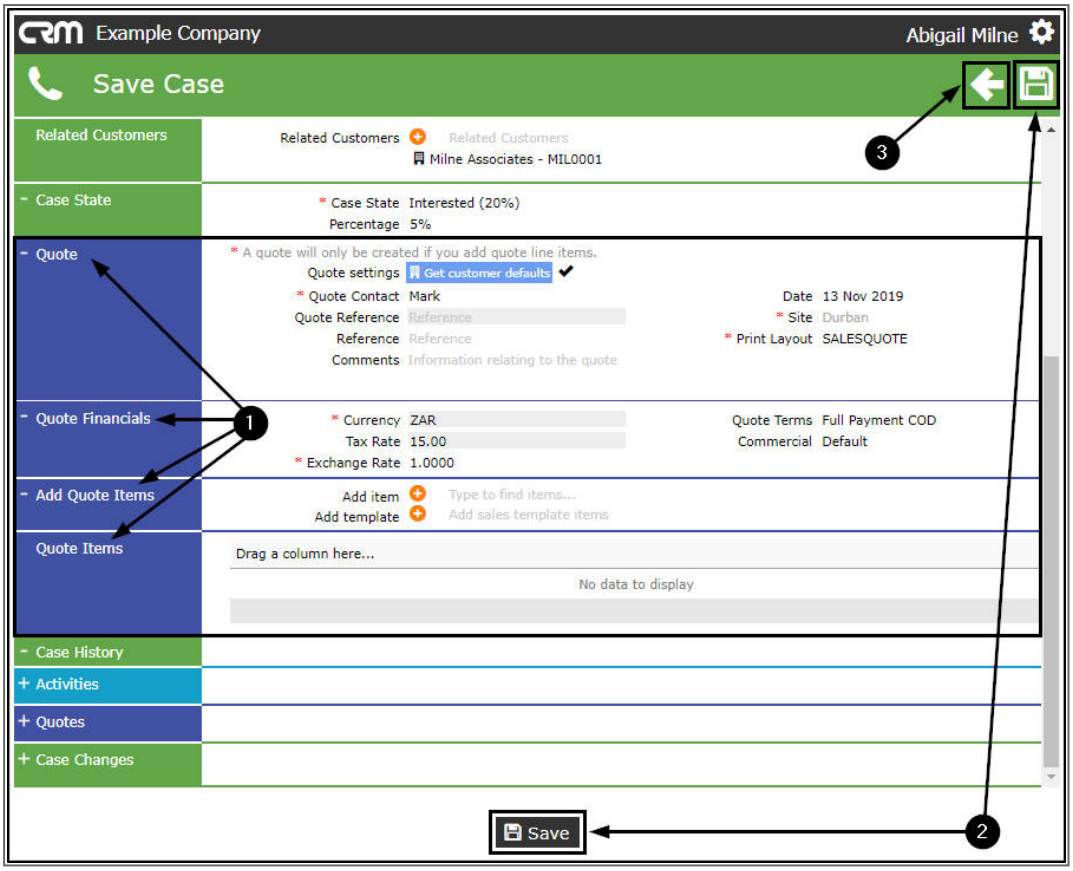

LINK A QUOTE TO AN ACTIVITY IN A CASE

1. In the **My Cases** page,
2. Hover over a selected case to reveal the Action buttons.
3. Click on the New Activity button.

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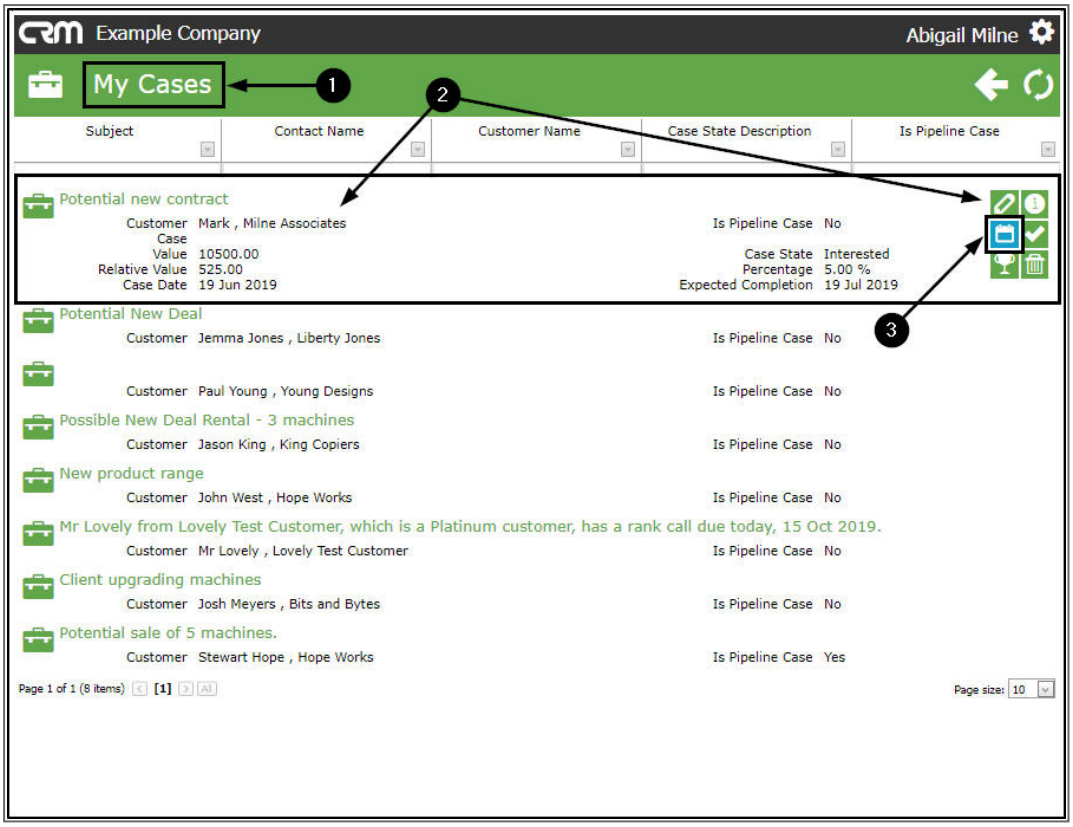

1. The **Save Activity** page will open.
2. Expand the **Quote** frame.

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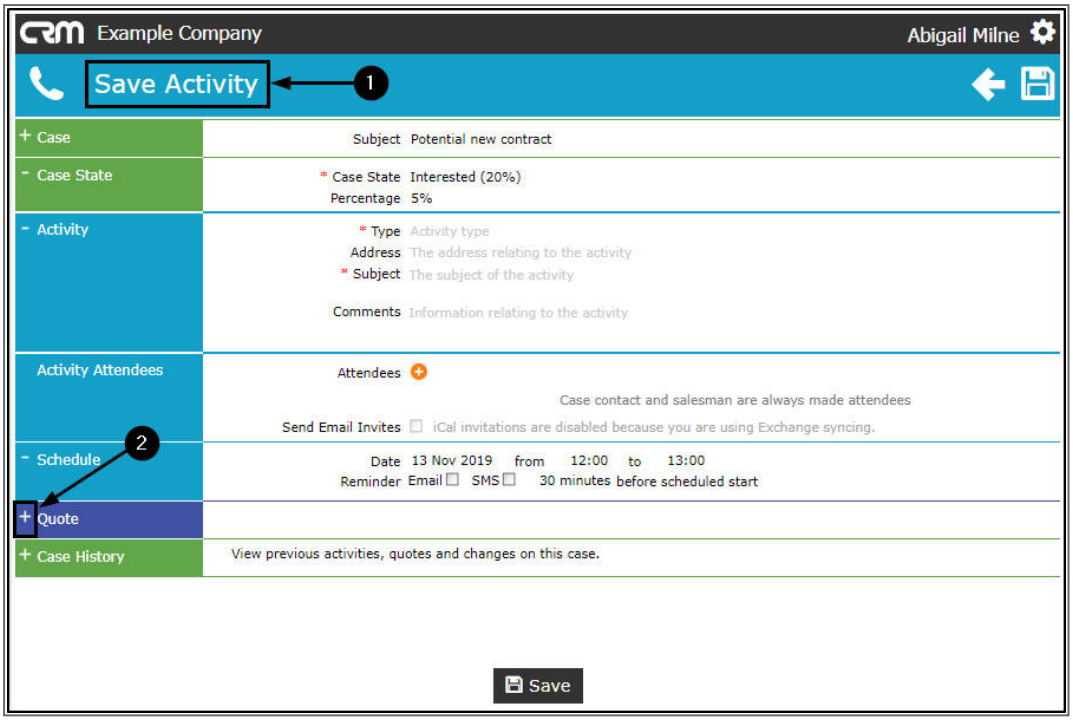

1. The Quote, Quote Financials, Add Quote Items and Quote Items frames will be expanded.
    - Ensure that you have filled in any mandatory fields [*] and then follow the Link Quote Process to create the new quote.
2. Either click on **Save** to keep the changes or
3. Click on **Back** to return to the My Cases Screen.
4. For the purpose of this manual, click on the **CRM** logo to return to the Dashboard (Home page).

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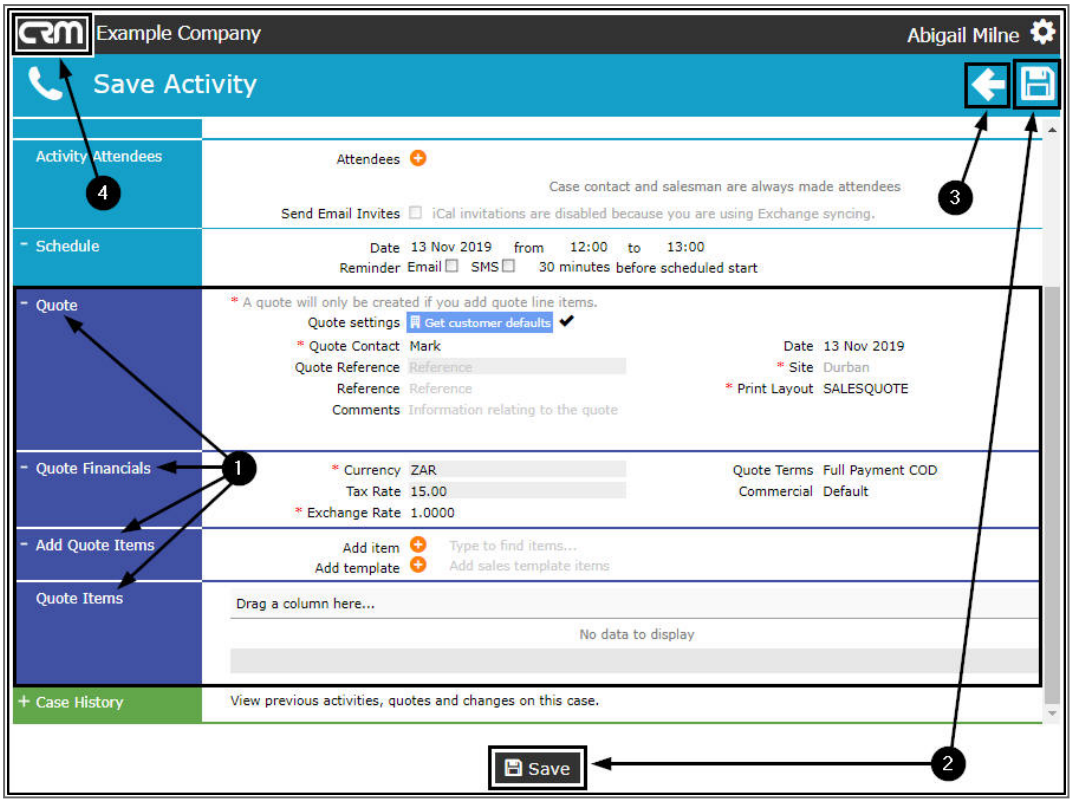

LINK A QUOTE WHEN EDITING AN ACTIVITY

1. In the **Dashboard**,
2. Click on the **Activities** tile.

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1. The My Activities page will open.
2. Hover over a selected Activity to reveal the Action buttons.
3. Click on either the View/Edit this Activity button or the Reschedule this Activity button.
    - (Either of these buttons will direct you to the Save Activity page where you can add a new quote.)

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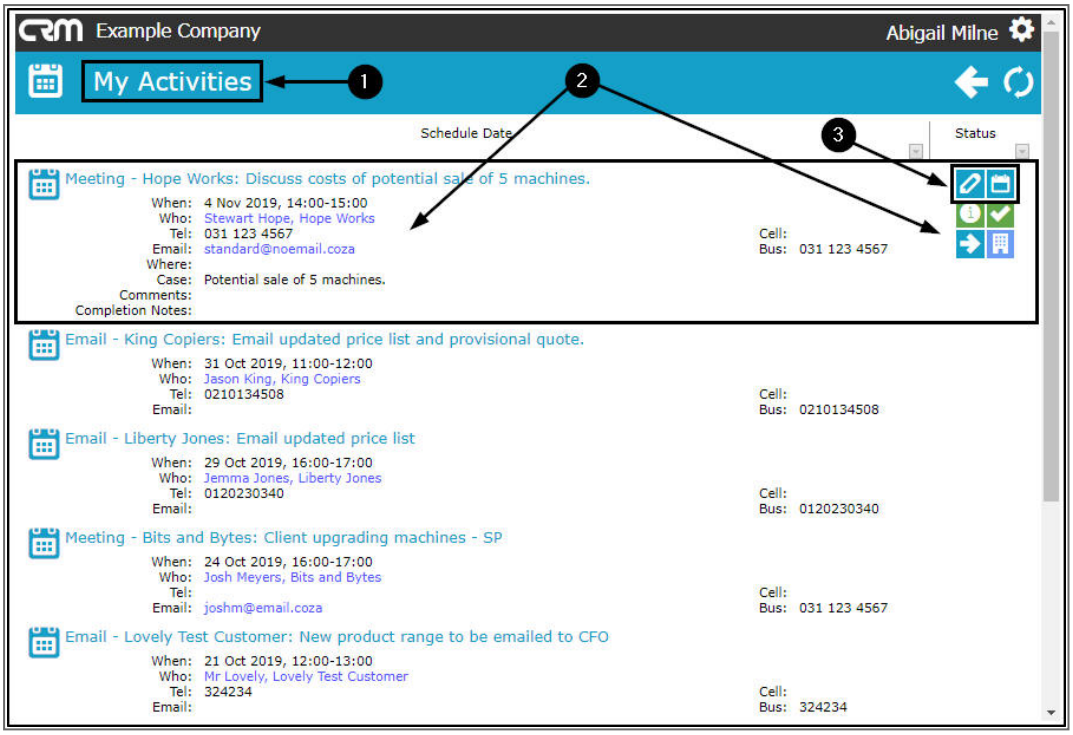

1. The Save Activity page will open.
2. Expand the **Quote** frame.

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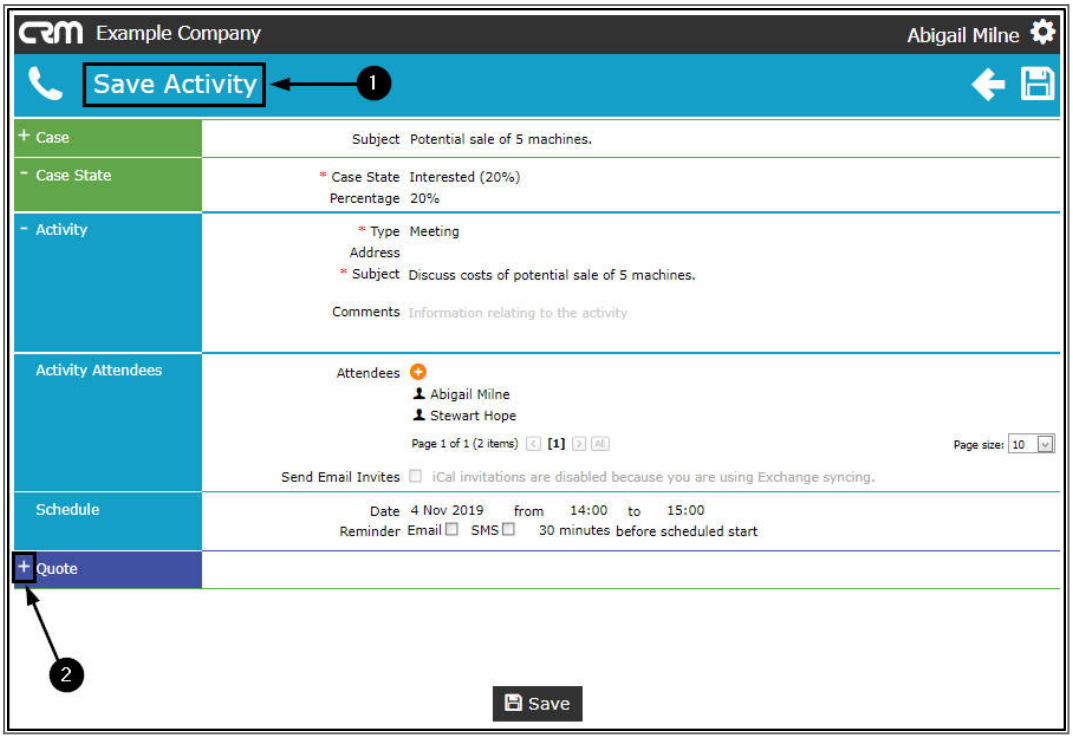

1. The Quote, Quote Financials, Add Quote Items and Quote Items frames will be expanded.
    - Ensure that you have filled in any mandatory fields [*] and then follow the Link Quote Process to create the new quote.
2. Either click on **Save** to keep the changes or
3. Click on **Back** to return to the My Activities Screen.

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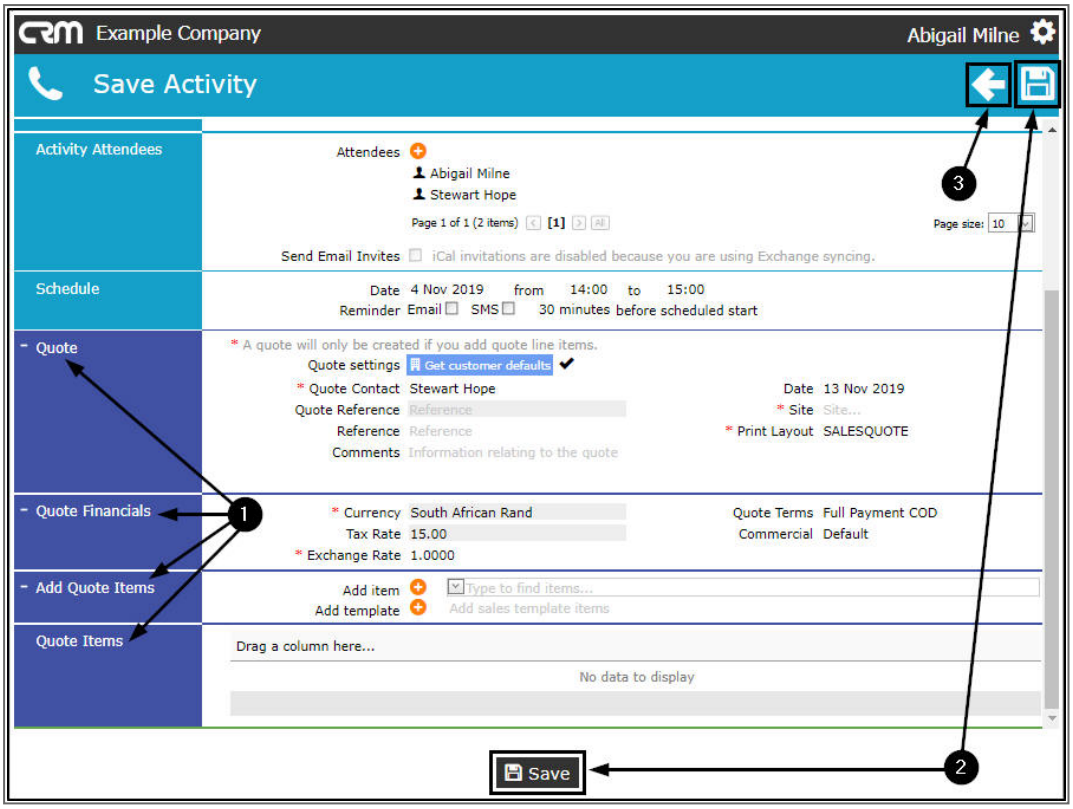

1. In the **My Activities** page,
2. Hover over a selected Activity to reveal the Action buttons.
3. Click on the View Case Info and History button.

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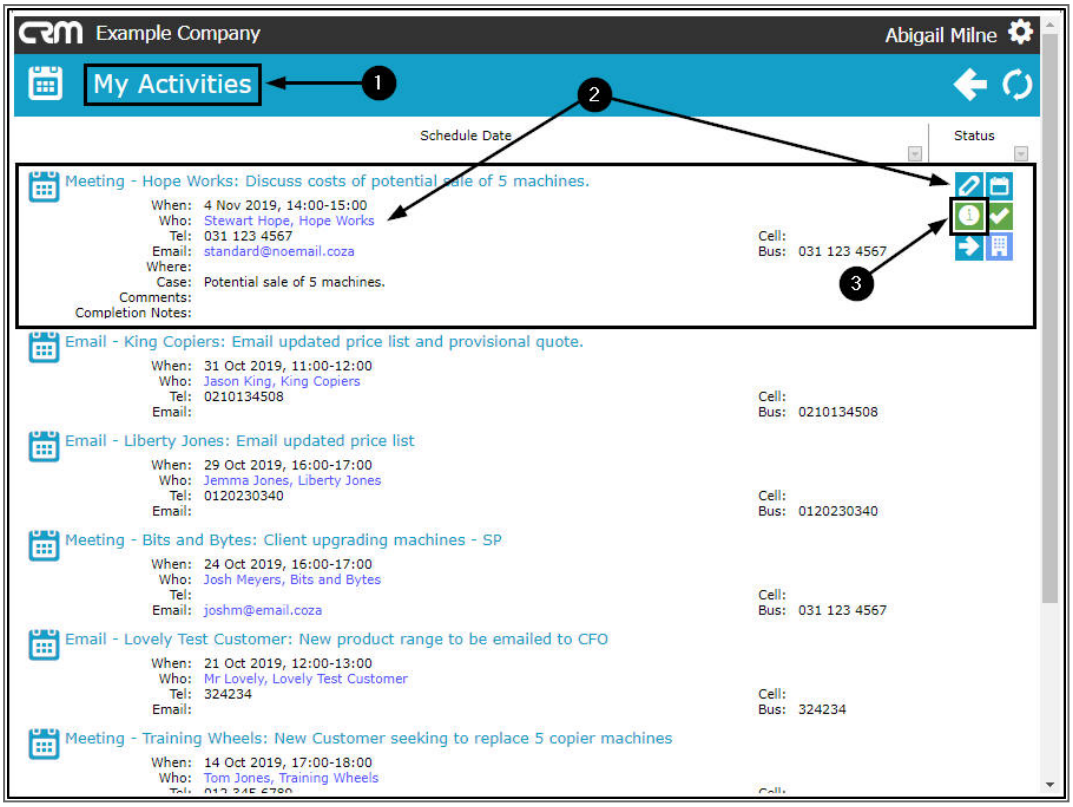

1. The **Save Case** page will open.
2. Expand the **Quote** frame.

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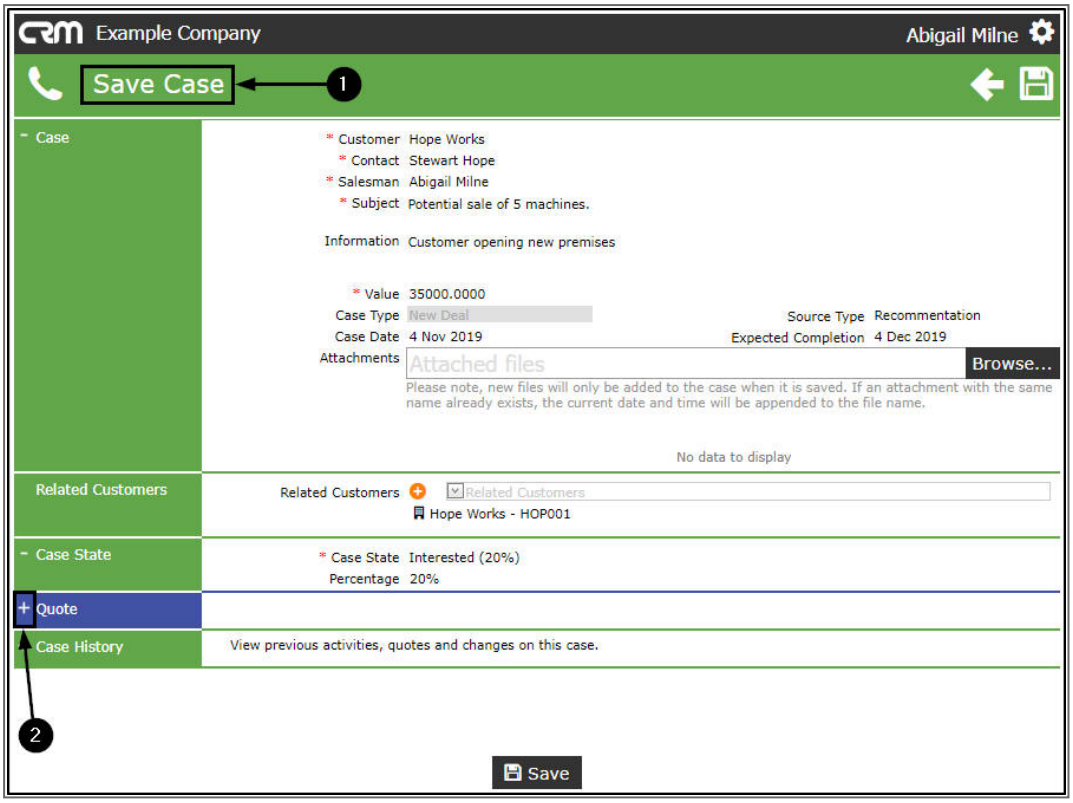

1. The Quote, Quote Financials, Add Quote Items and Quote Items frames will be expanded.
    - Ensure that you have filled in any mandatory fields [*] and then follow the Link Quote Process to create the new quote.
2. Either click on **Save** to keep the changes or
3. Click on **Back** to return to the My Cases Screen.
4. For the purpose of this manual, click on the **CRM** logo to return to the Dashboard (Home page).

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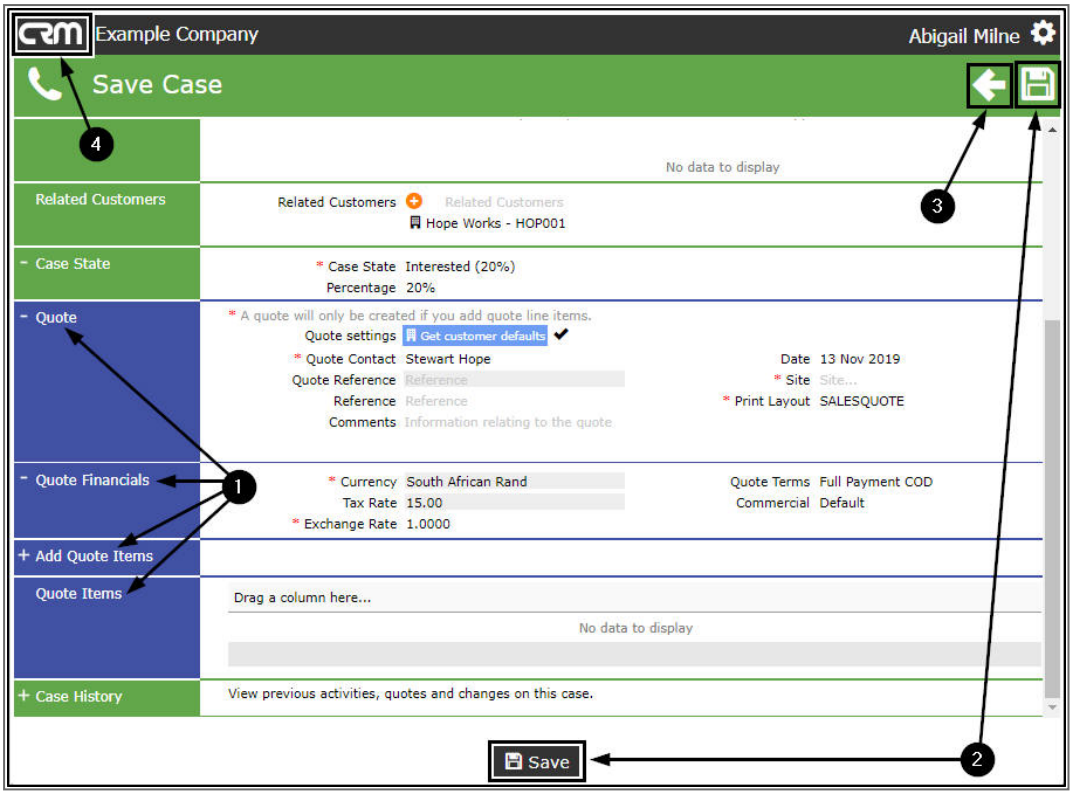

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LINK A QUOTE FROM CUSTOMER DASHBOARD WHEN EDITING A CASE

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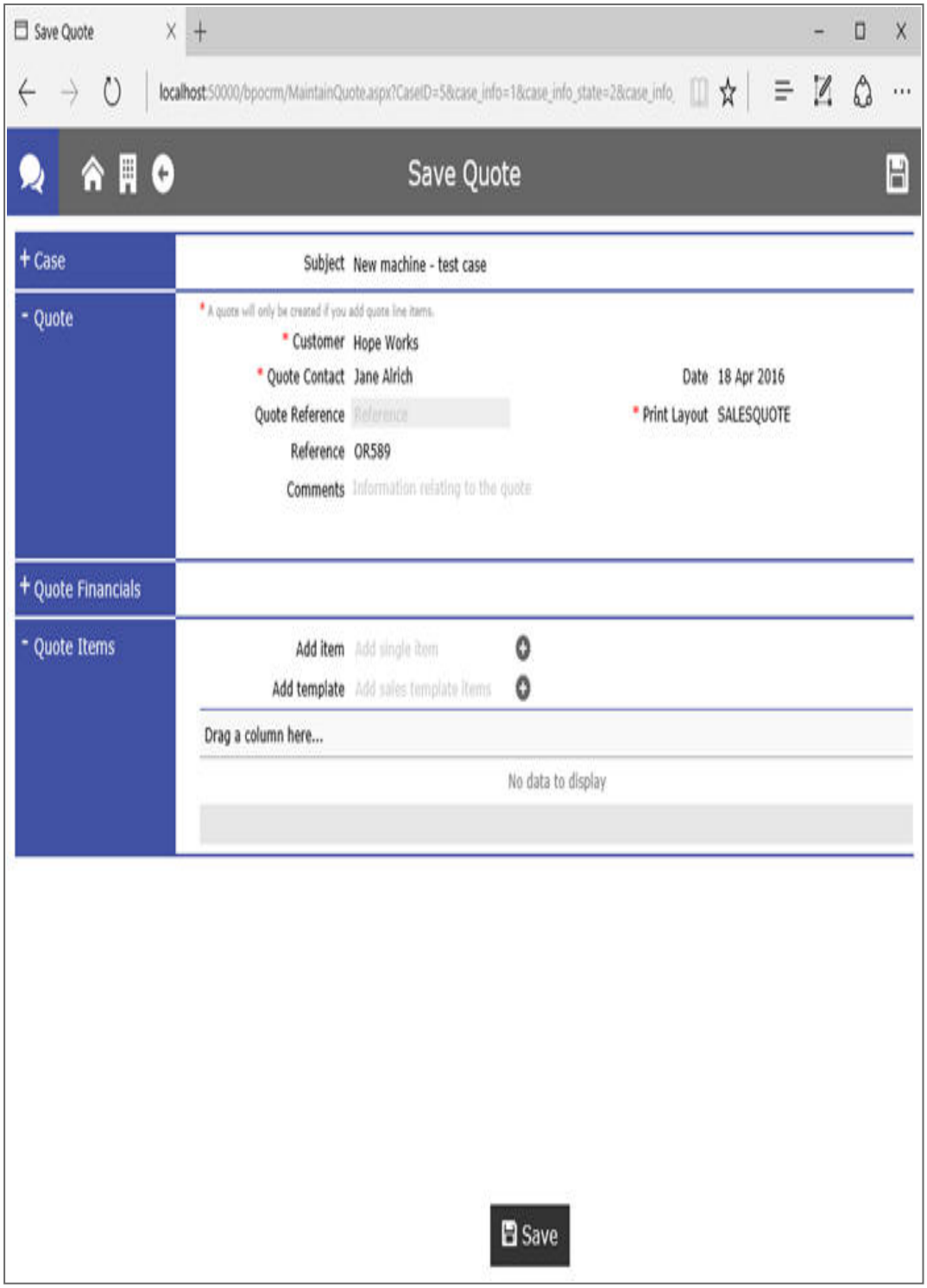

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- Search for, and select the Quote Contact.
- Type in a reference, e.g. a customer order number.
- Type in comments related to the quote.

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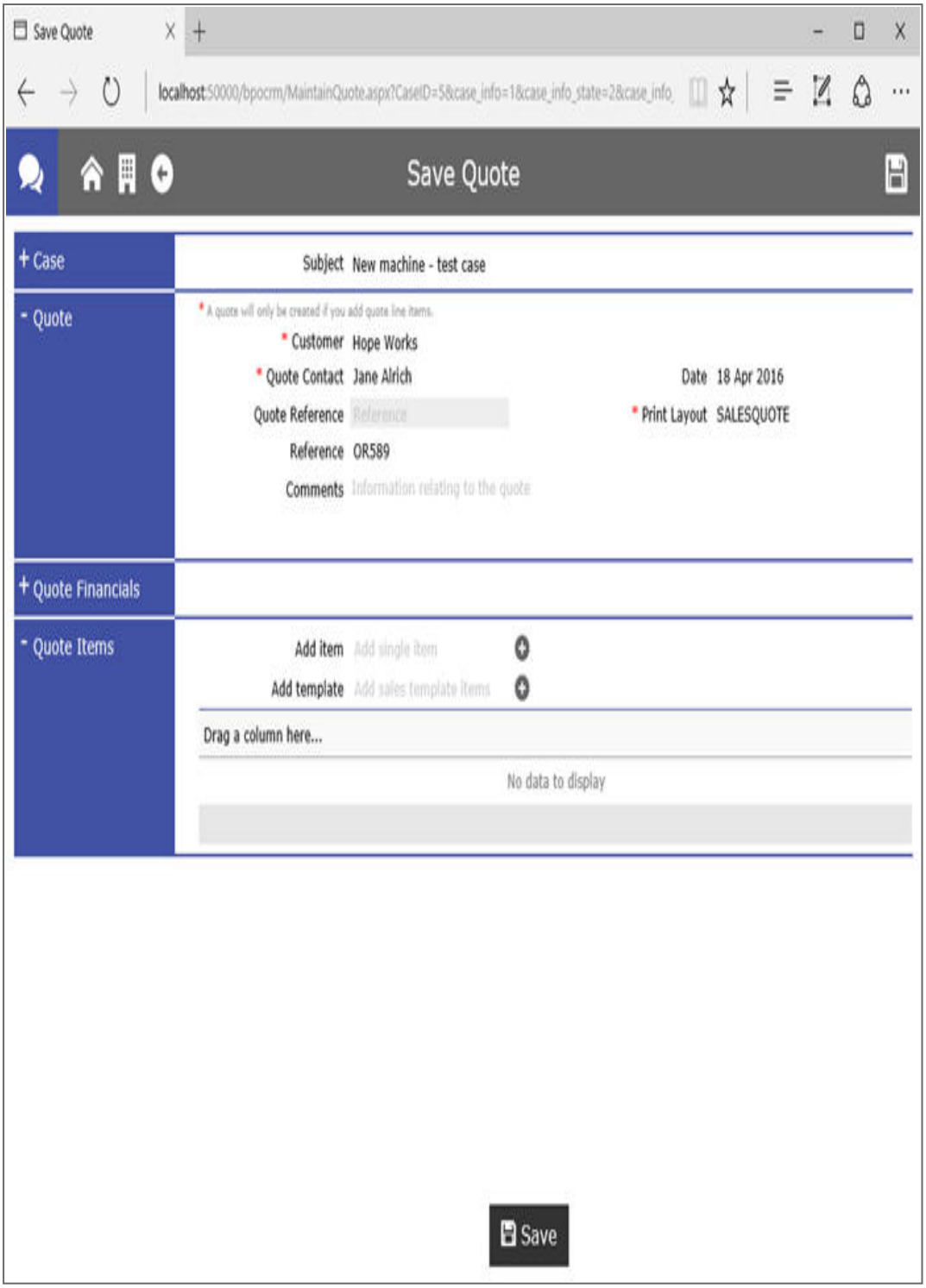

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- Search for, and select the Quote Contact.
- Type in a reference, e.g. a customer order number.
- Type in comments related to the quote.

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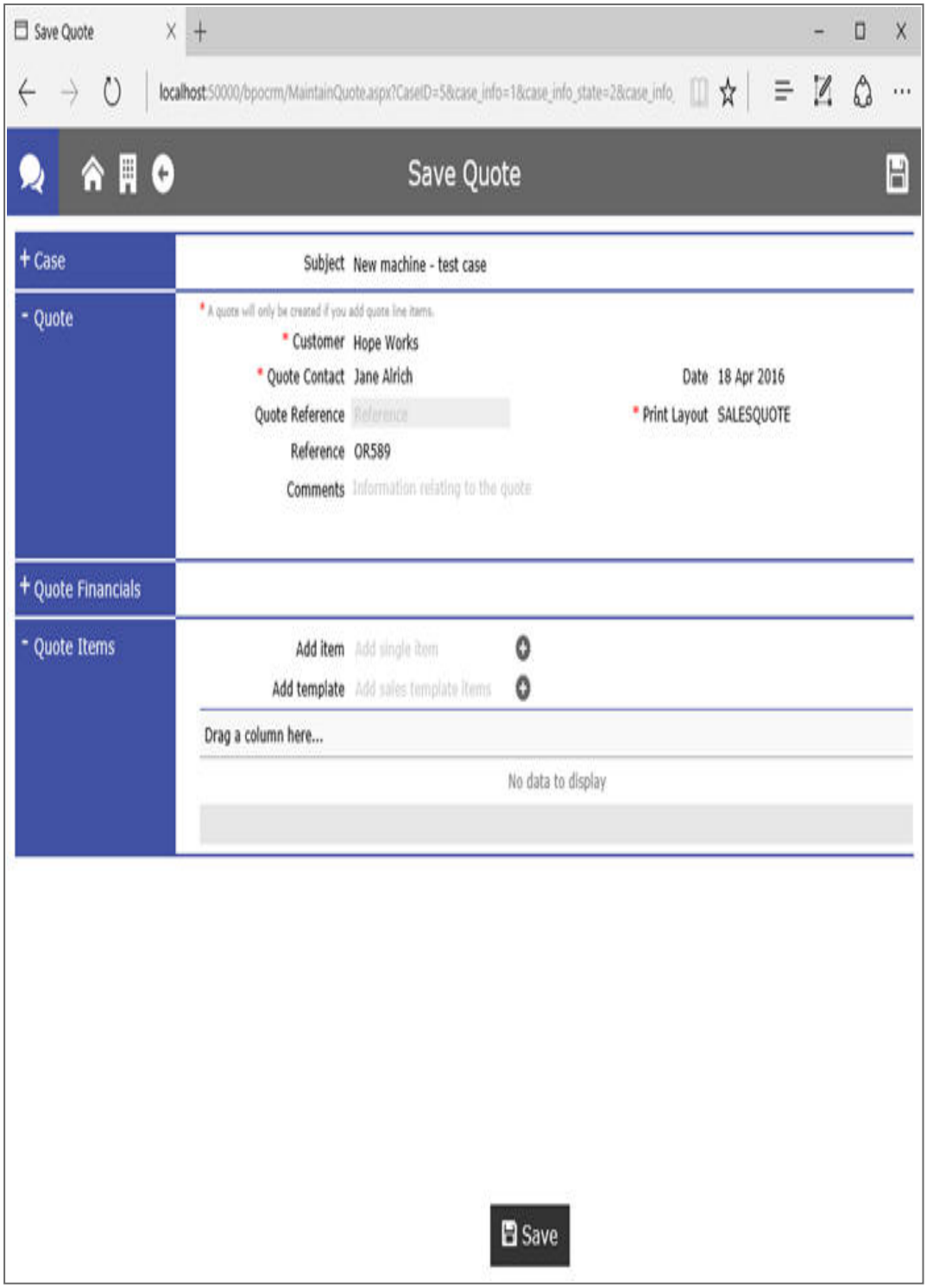

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- Search for, and select the Quote Contact.
- Type in a reference, e.g. a customer order number.
- Type in comments related to the quote.

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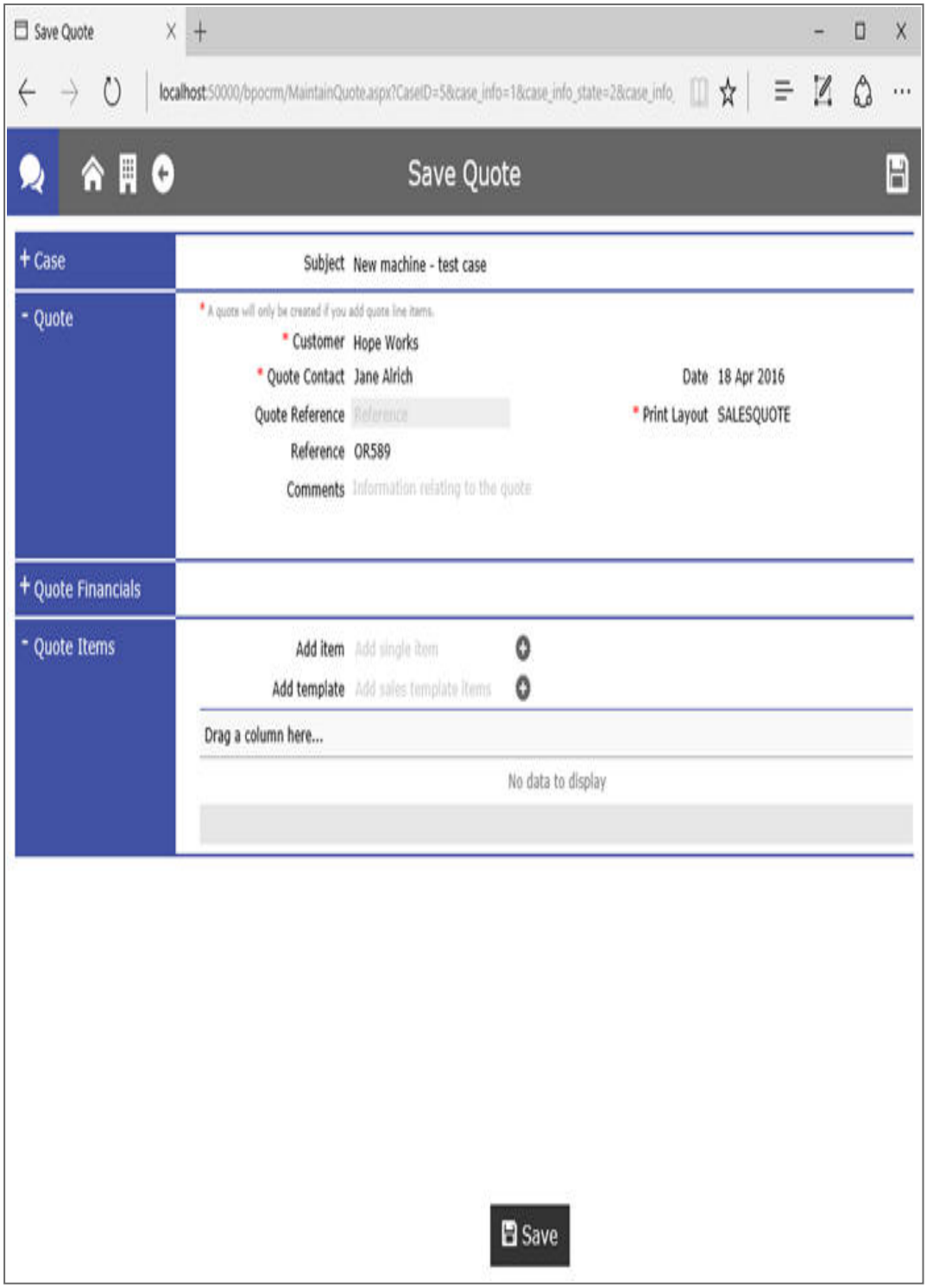

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- Expand the 'Quote Financials' section to view the customer's currency, tax rate and exchange rate.
- This section also includes the ' ***Quote Terms*** ' - this is the quote repayment factor and should be configured in Static Rights (Sales Quote Repayment Method).
- Select the terms as required for this quote.

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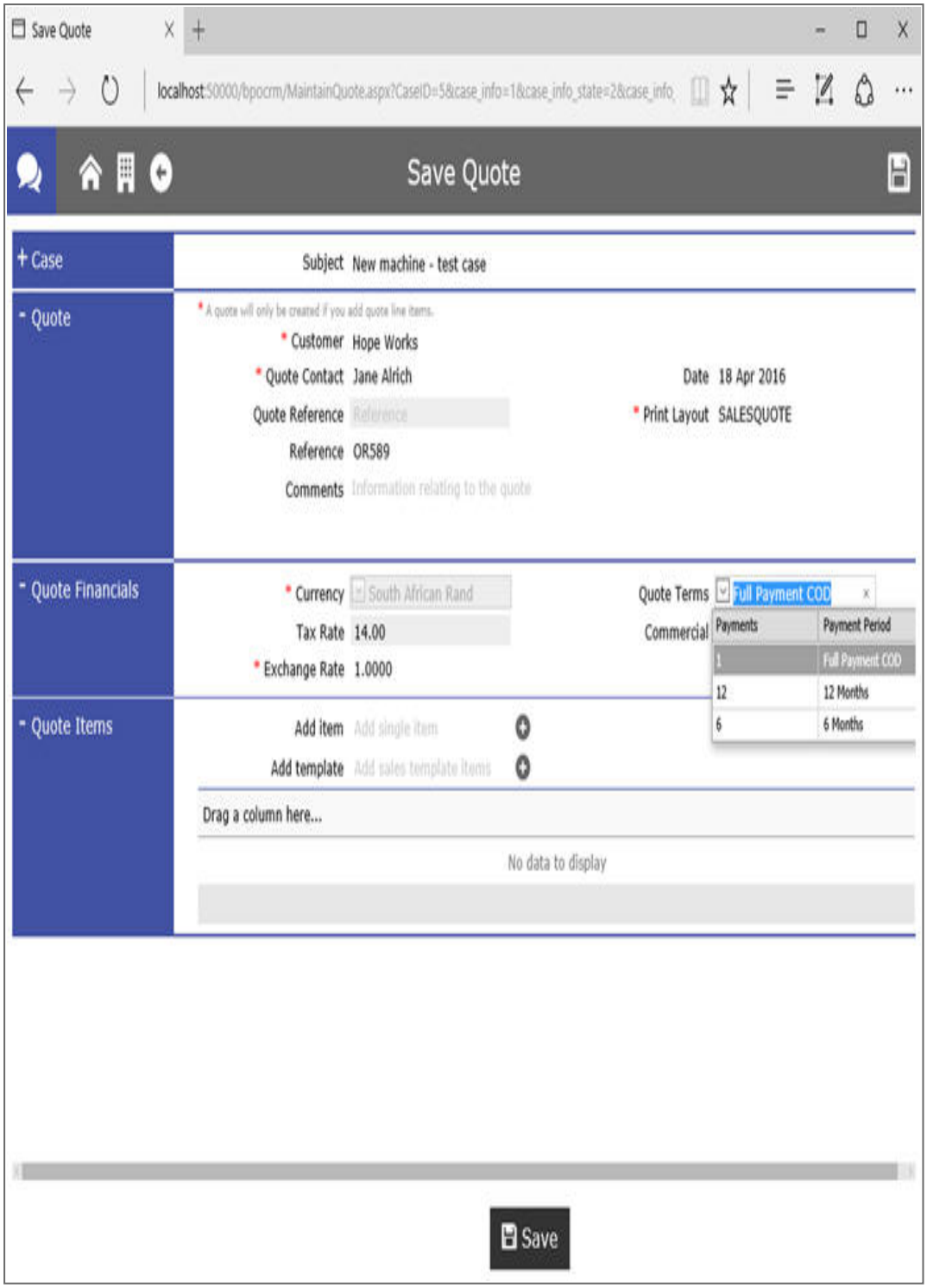

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- You now have the ability to **add single items** to a quote (with or without also using quote templates).
- ***Note***: For Part Numbers to pull through to this list - you need to ensure that the Quote Products are specified .

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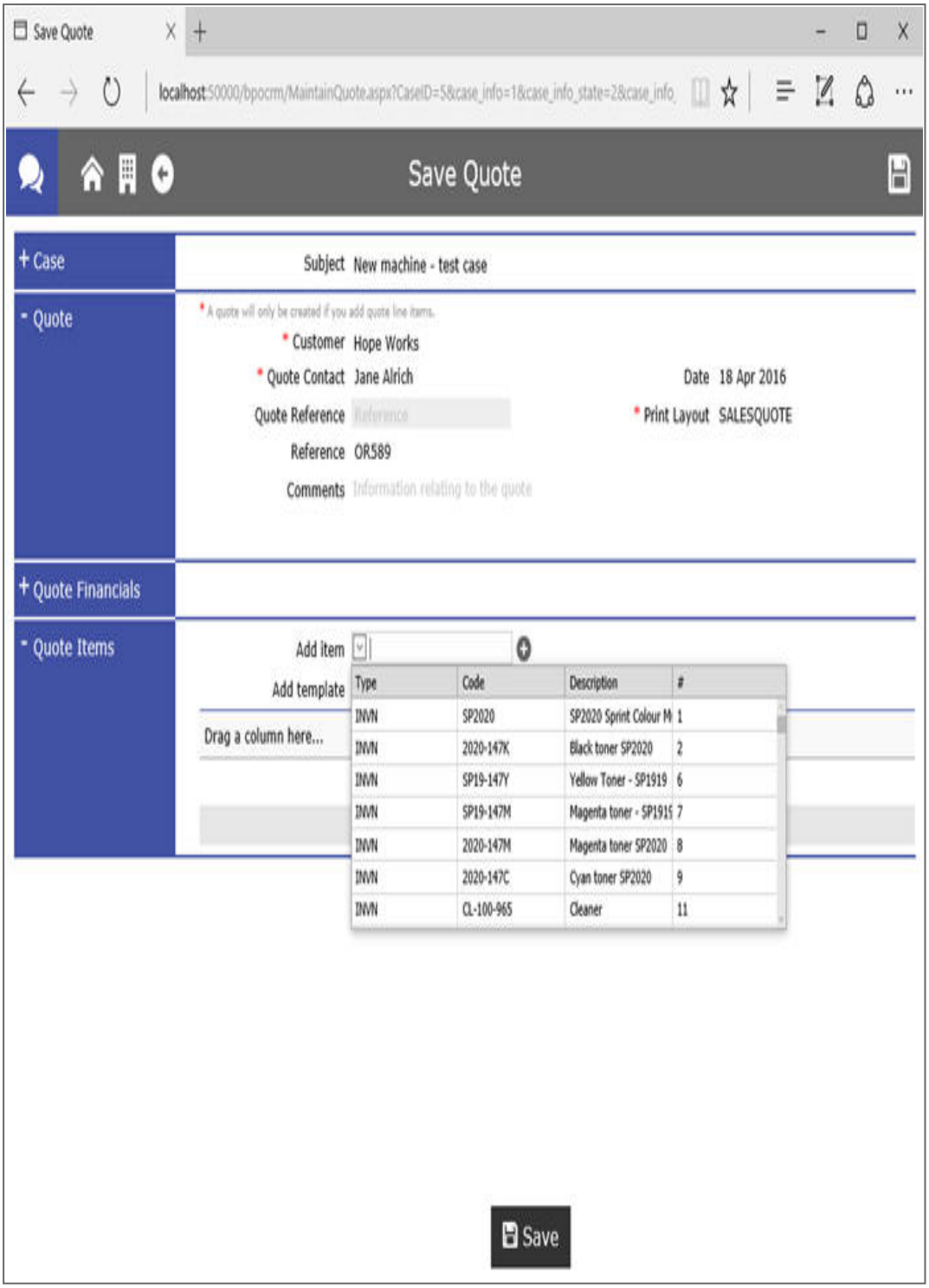

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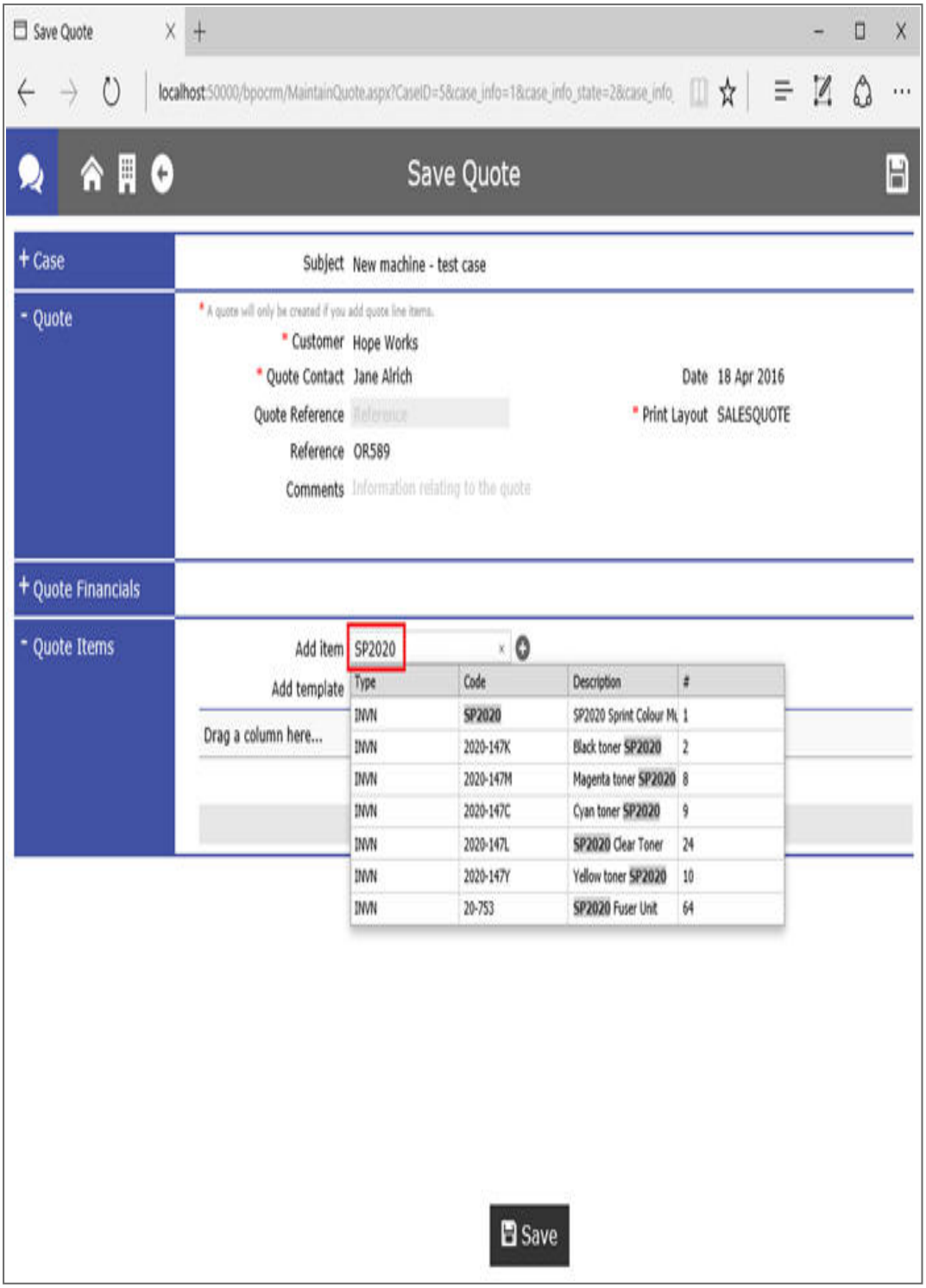
- Type in the text field to filter on the Code and Description lines.
- Click on the item you want to add



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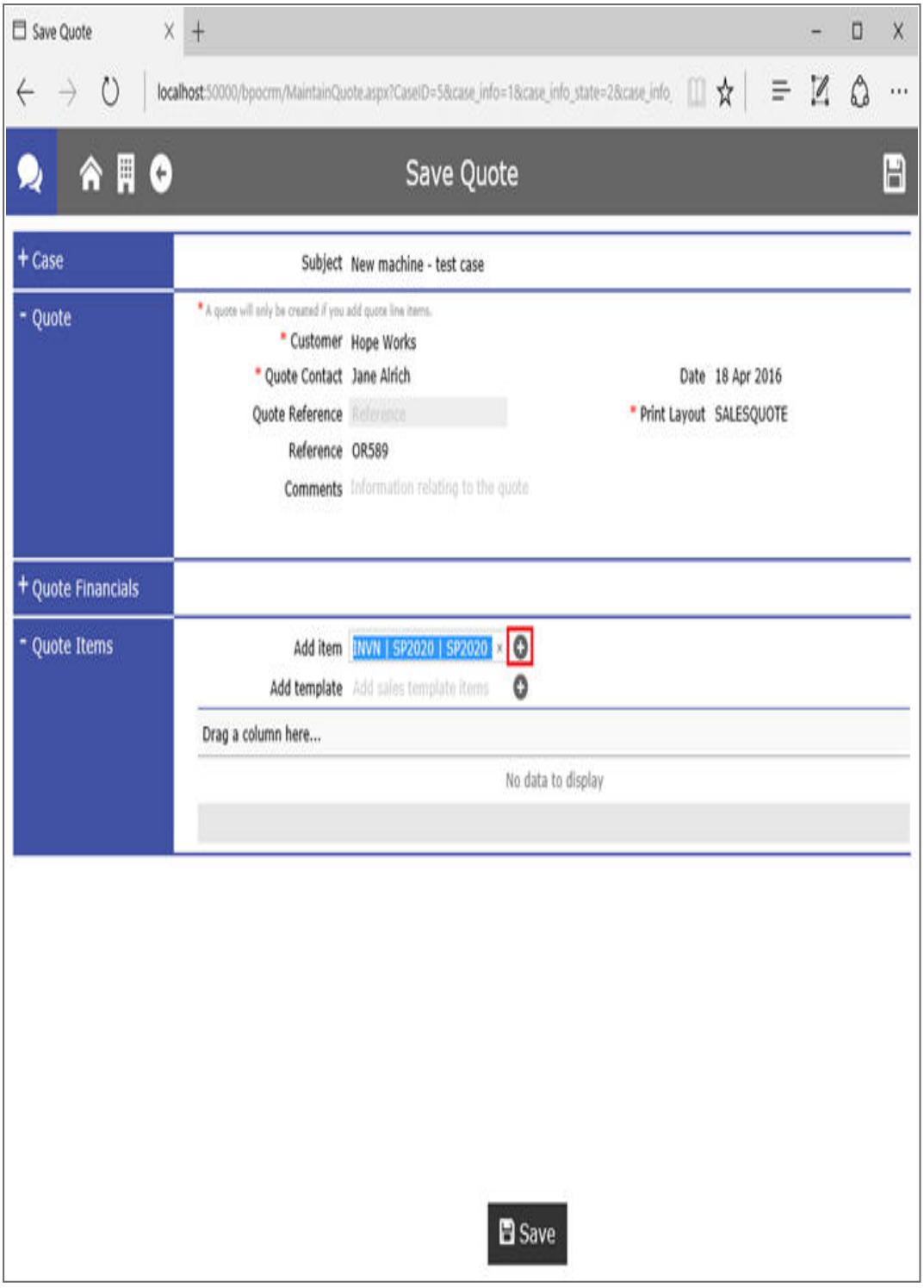
- Click on the 'Add Item' button



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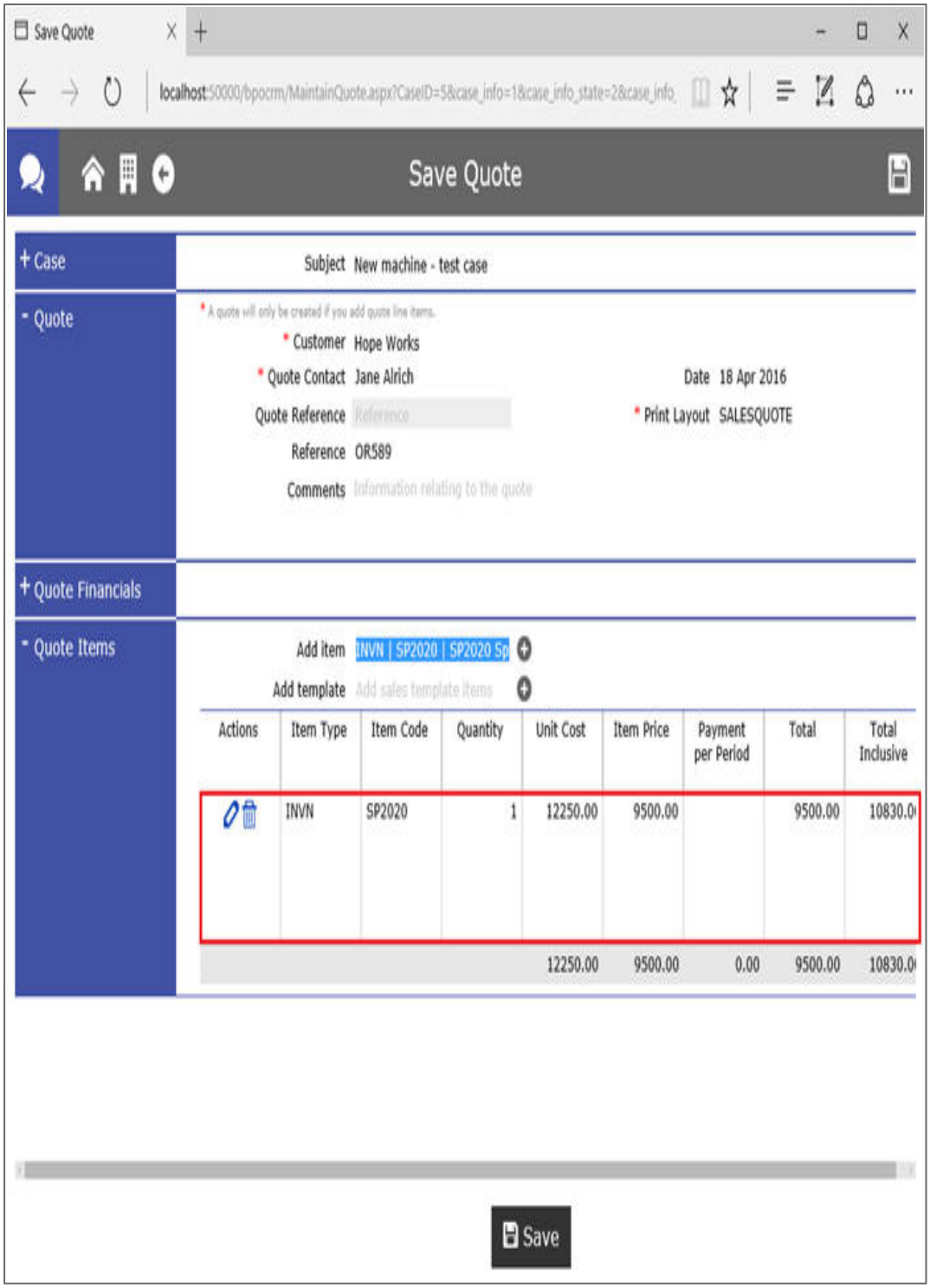
- The item will be added to the Quote Line Items sections



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- To add Sales Templates: click on the 'Add Quote Template Items' dropdown
- You could also type into the text box to filter for the template you need
- Click on the template required.
- Link the templates items by clicking on the 'Add Items' button

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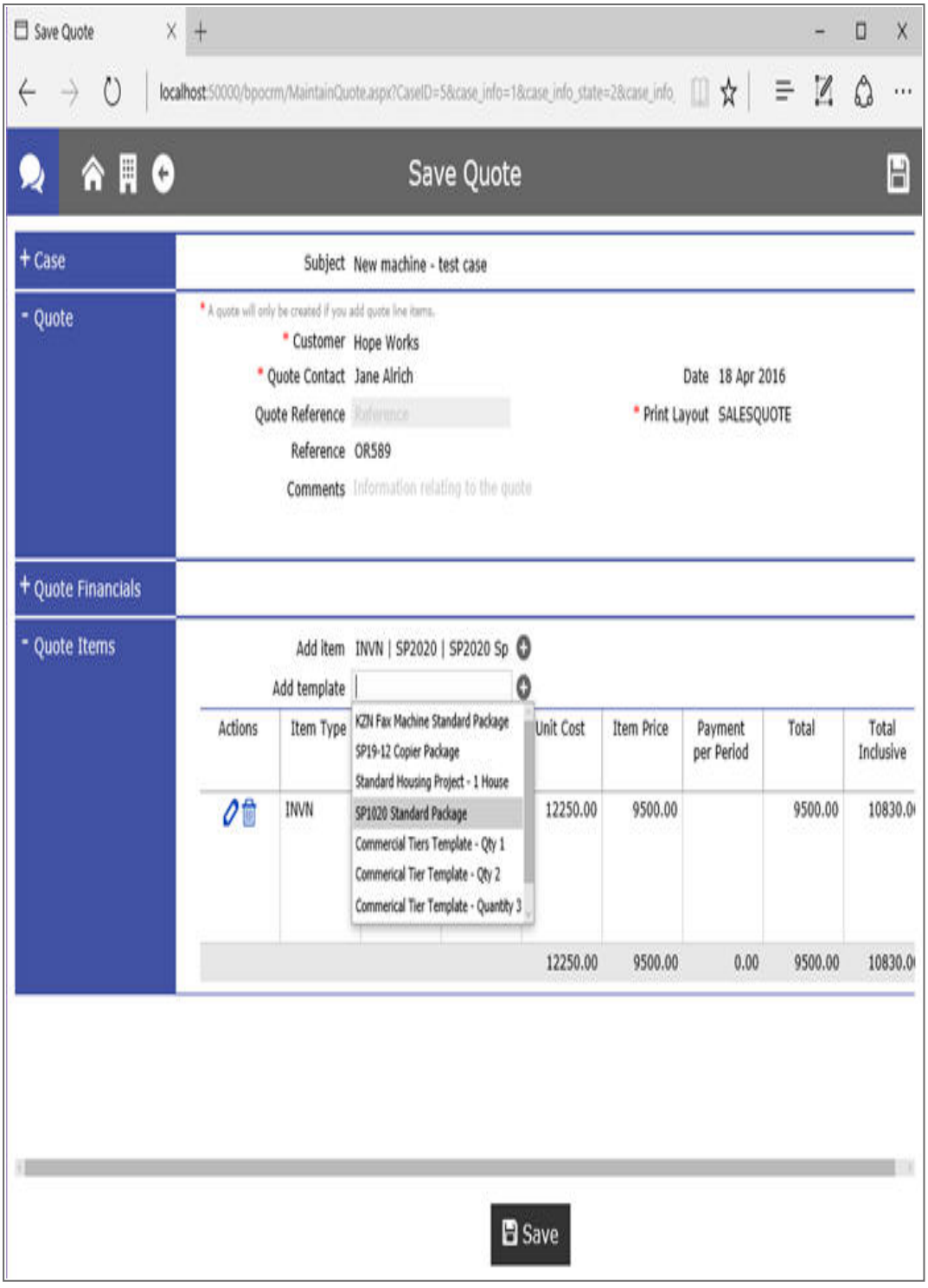

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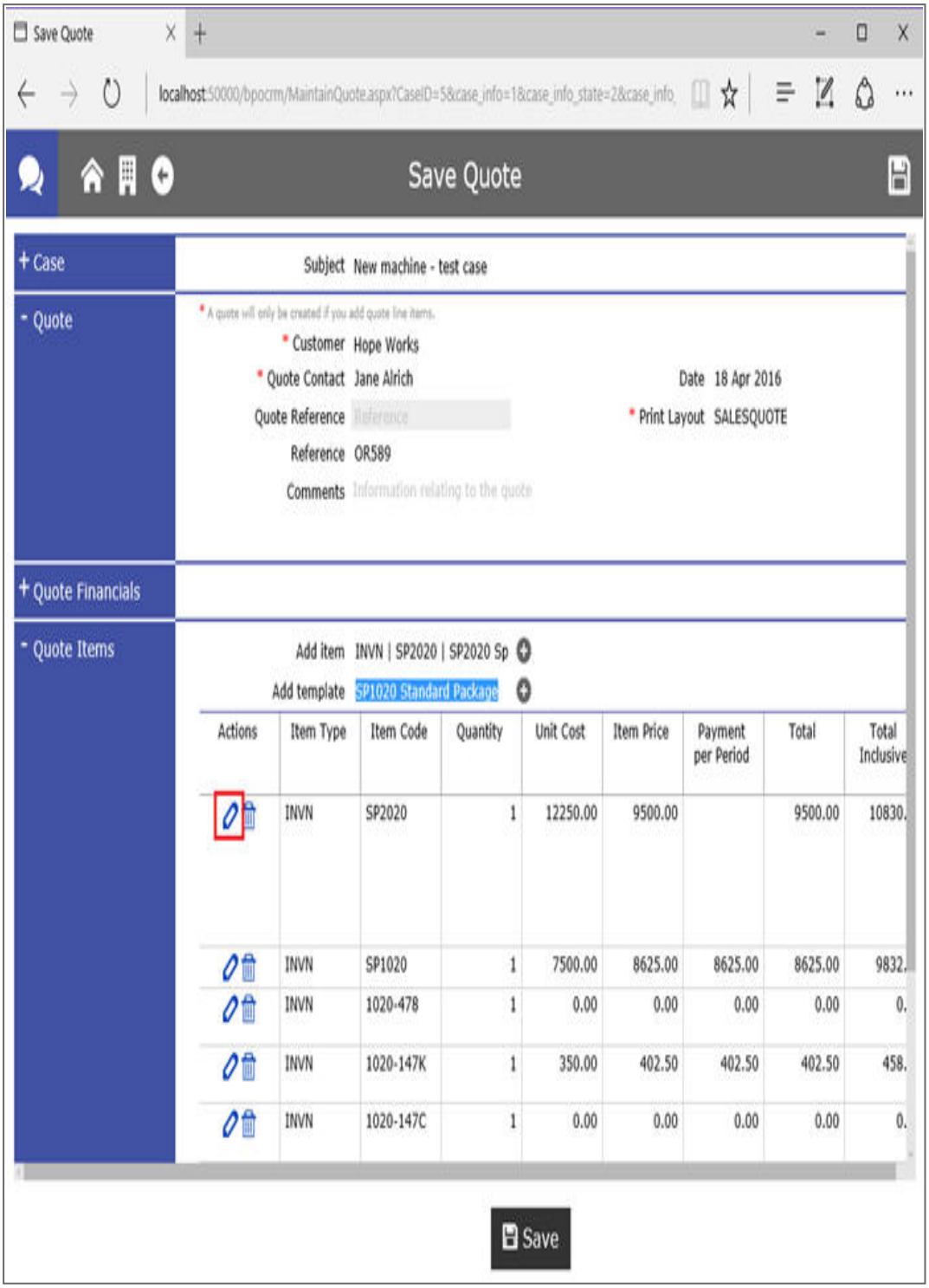
- You can ***edit a line*** item, by clicking on the 'Edit' button on that line.



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- The quote item edit section will come up.
- Make the changes required.
- Click on 'Update' to view the changes in the quote.
- Click on 'Done' when you have completed all the changes.

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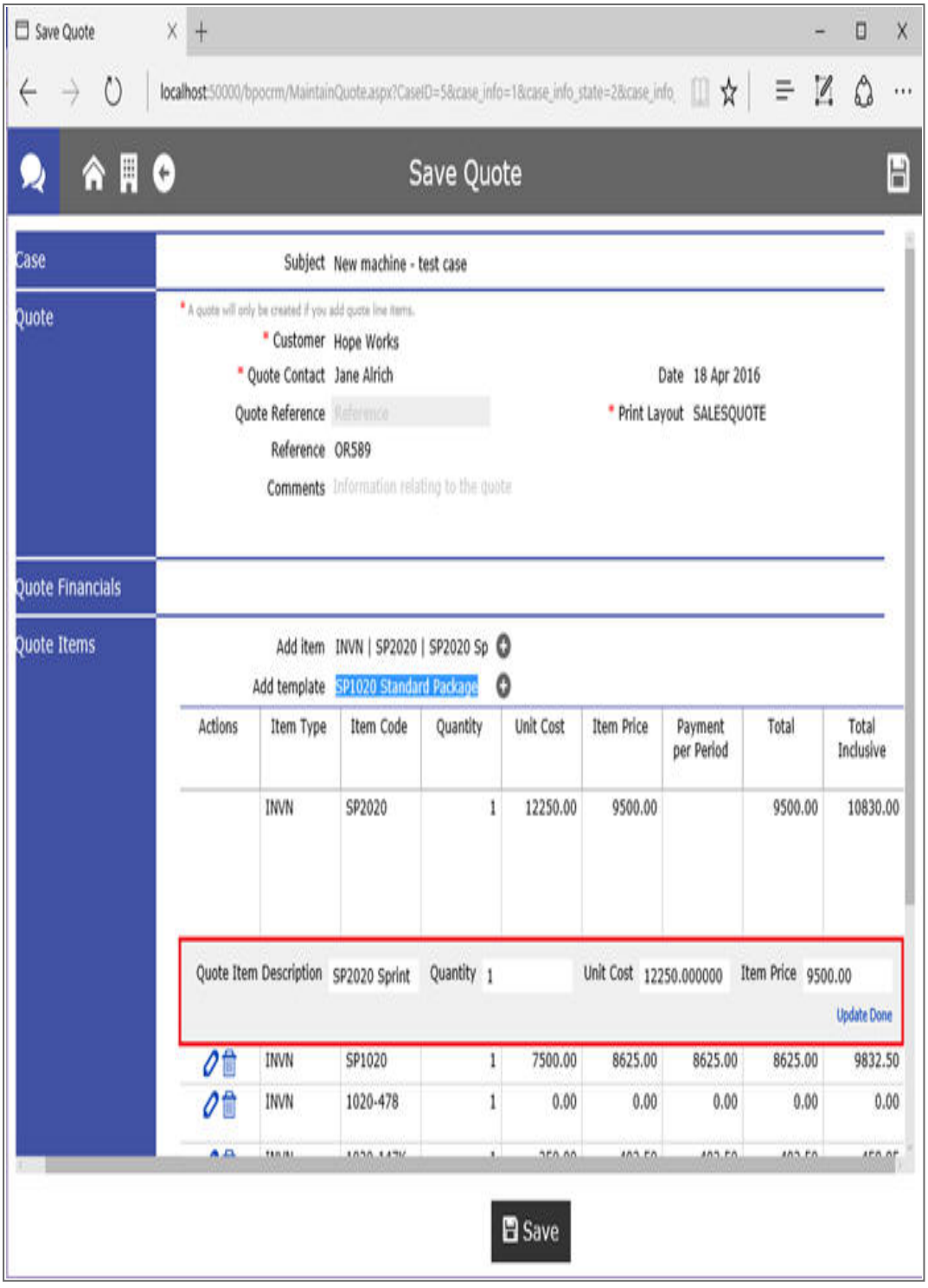

- Click on the 'delete' button to remove line items from the quote.

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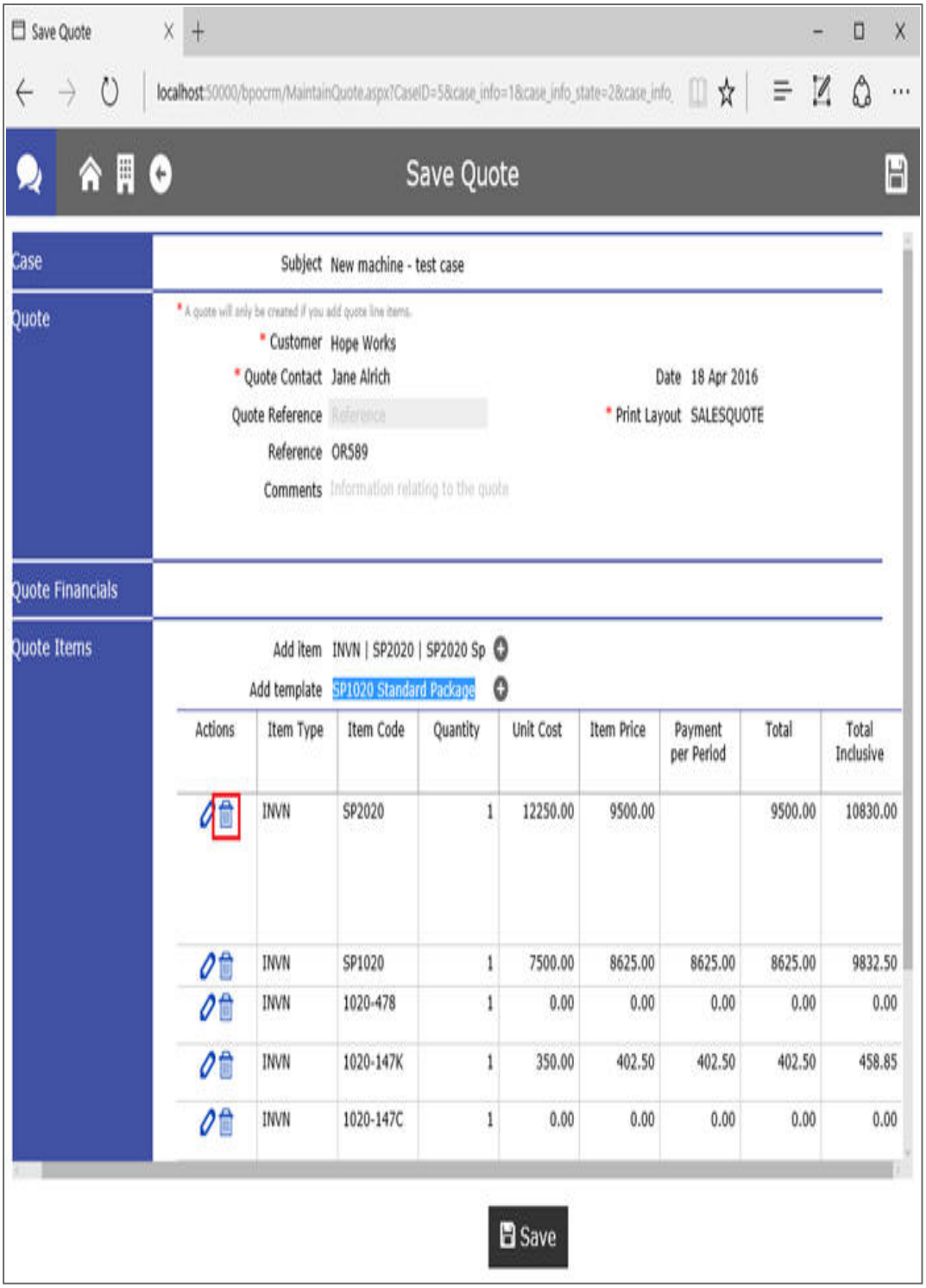

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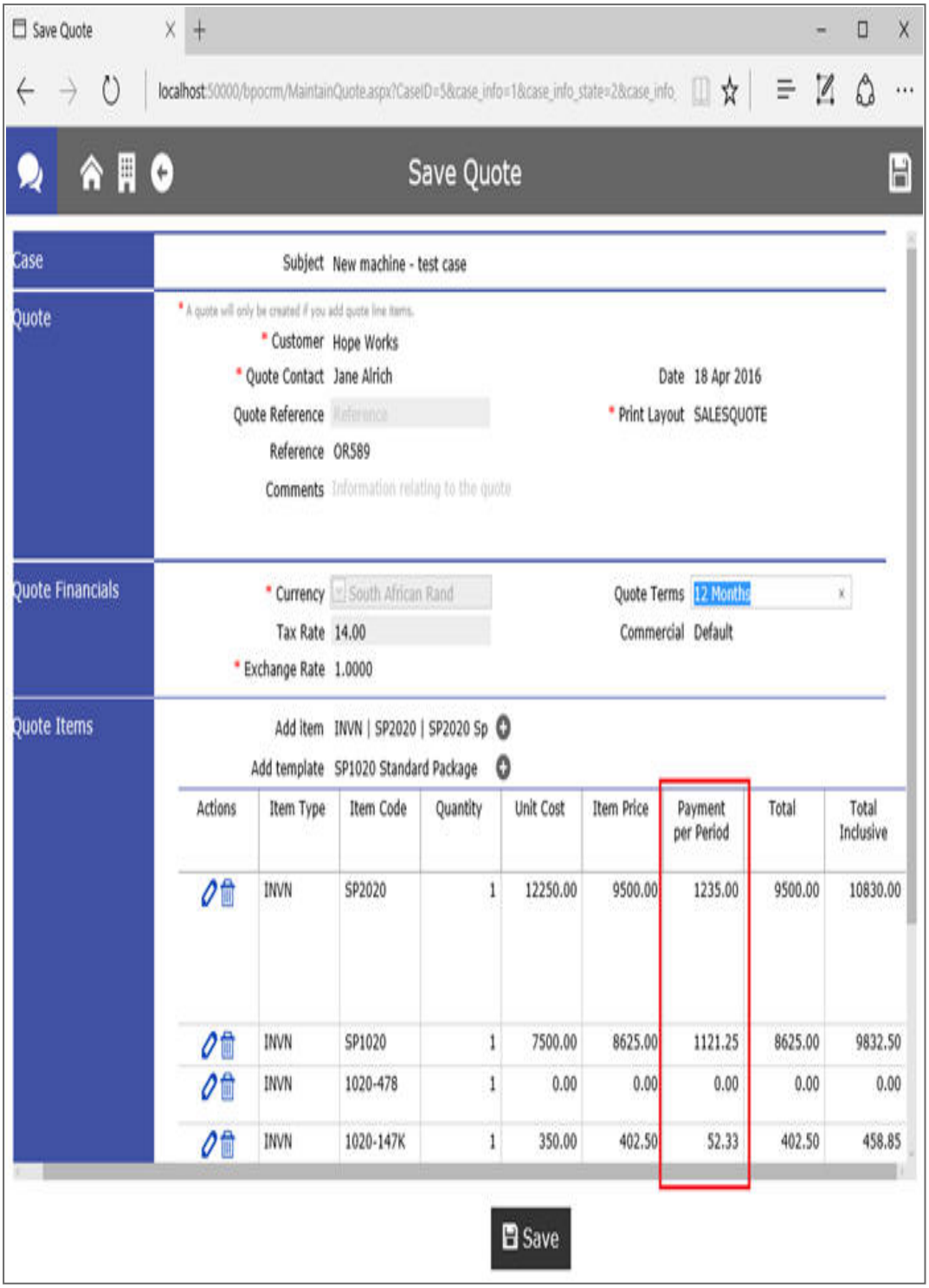
- ***Note**: A new Quote Terms method can be selected, which will reapply the 'Repayment Amount per Period'*



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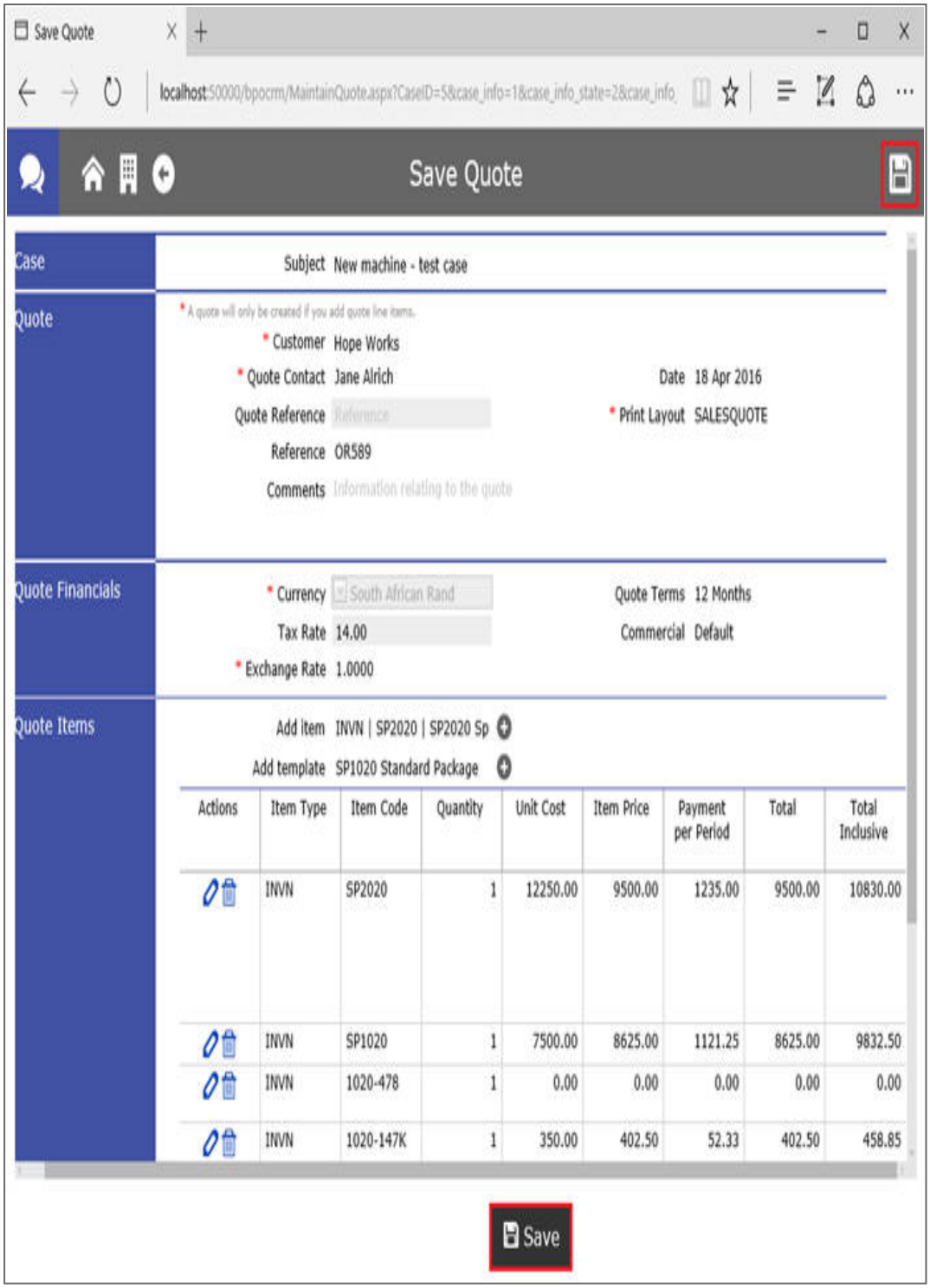
- Make sure you 'Save' once you are done.



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See Also:

- View / Print / Email the Quote

CRM.015.001

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