

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

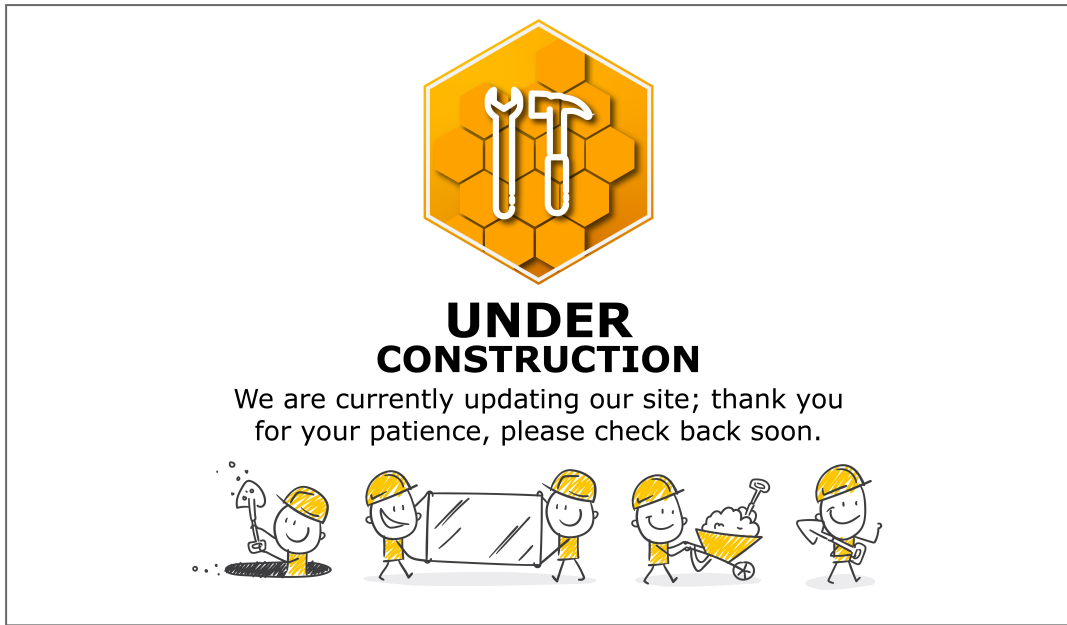
or to have the salesman:

- **Contact Me**

regarding the Quote.

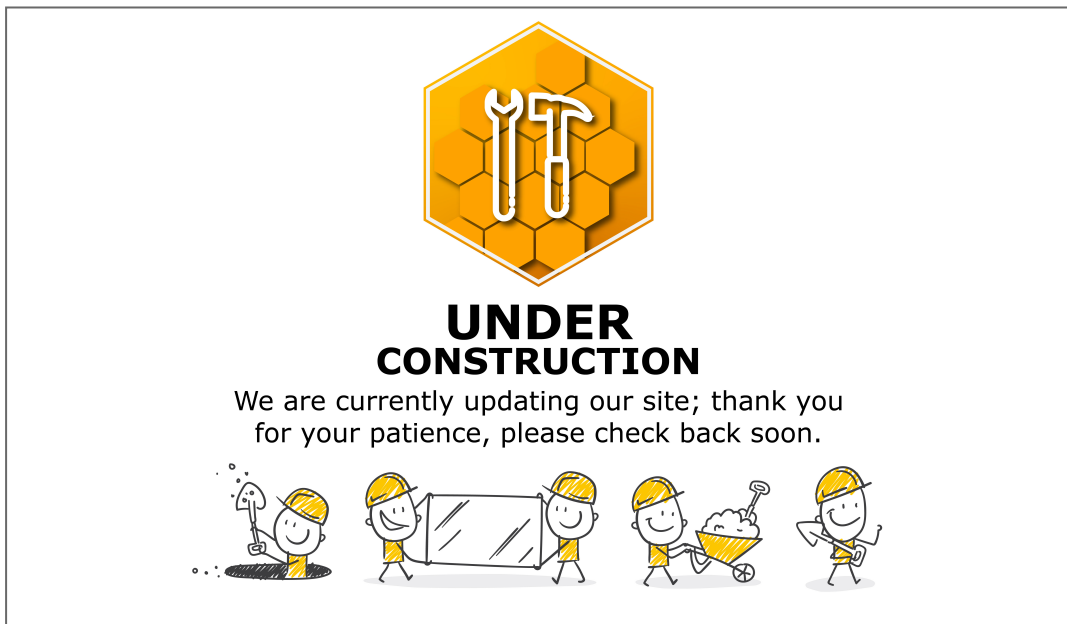
Once Accepted (or Rejected), a quote can no longer be edited.

•



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...??



ADD A NEW QUOTE WHEN EDITING A CASE

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

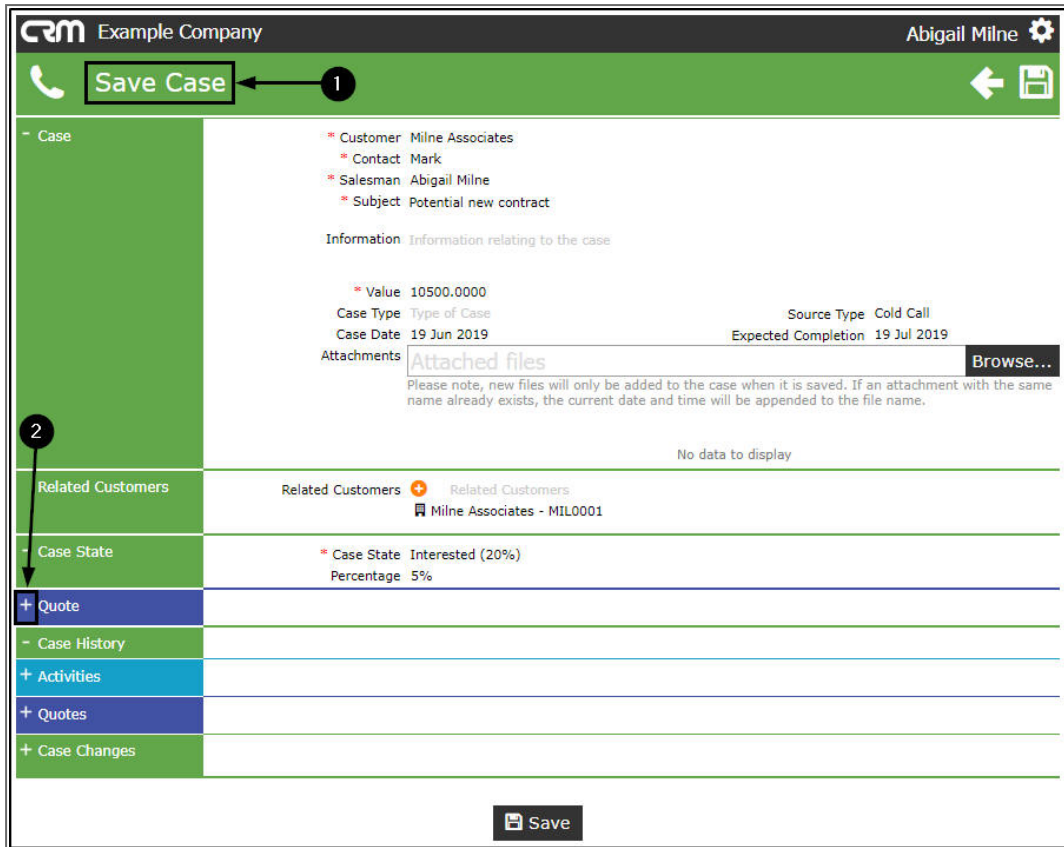


1. The **My Cases** page will open.
2. Hover over a selected case to reveal the **Action buttons**.
3. Click on either the **View Case Info and History** button or the **View/Edit this Case** button.
 - (Either of these buttons will direct you to the Save Case page where you can add a new quote.)

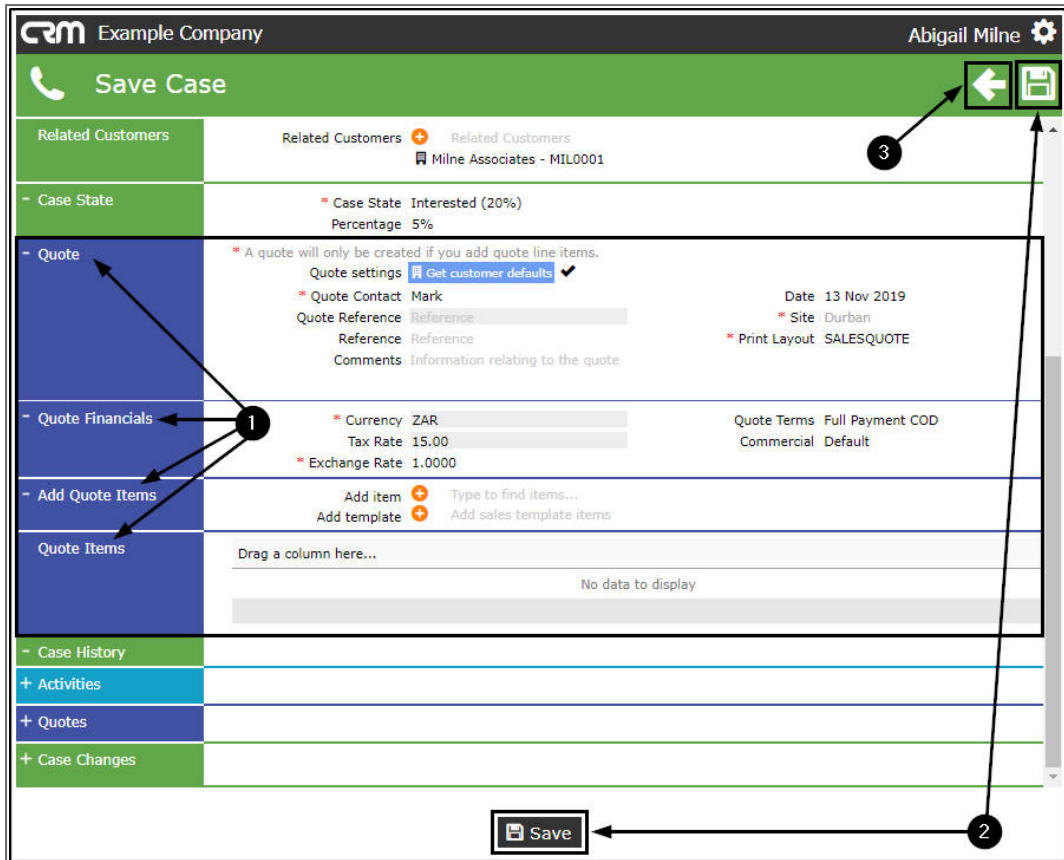
The screenshot shows the CRM interface for 'Example Company' with user 'Abigail Milne'. The 'My Cases' section is highlighted with callout 1. The first case, 'Potential new contract', is expanded, showing details like Customer (Mark, Milne Associates), Case Value (10500.00), and Case State (Interested). Callout 2 points to this expanded case. Callout 3 points to the action icons (edit, save, delete) for the case. The table below lists other cases.

Subject	Contact Name	Customer Name	Case State Description	Is Pipeline Case
Potential new contract	Mark, Milne Associates	Mark, Milne Associates	Interested	No
Potential New Deal	Jemma Jones, Liberty Jones	Jemma Jones, Liberty Jones		No
Possible New Deal Rental - 3 machines	Paul Young, Young Designs	Paul Young, Young Designs		No
New product range	Jason King, King Copiers	Jason King, King Copiers		No
Mr Lovely from Lovely Test Customer, which is a Platinum customer, has a rank call due today, 15 Oct 2019.	John West, Hope Works	John West, Hope Works		No
Client upgrading machines	Mr Lovely, Lovely Test Customer	Mr Lovely, Lovely Test Customer		No
Potential sale of 5 machines.	Josh Meyers, Bits and Bytes	Josh Meyers, Bits and Bytes		No
	Stewart Hope, Hope Works	Stewart Hope, Hope Works		Yes

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

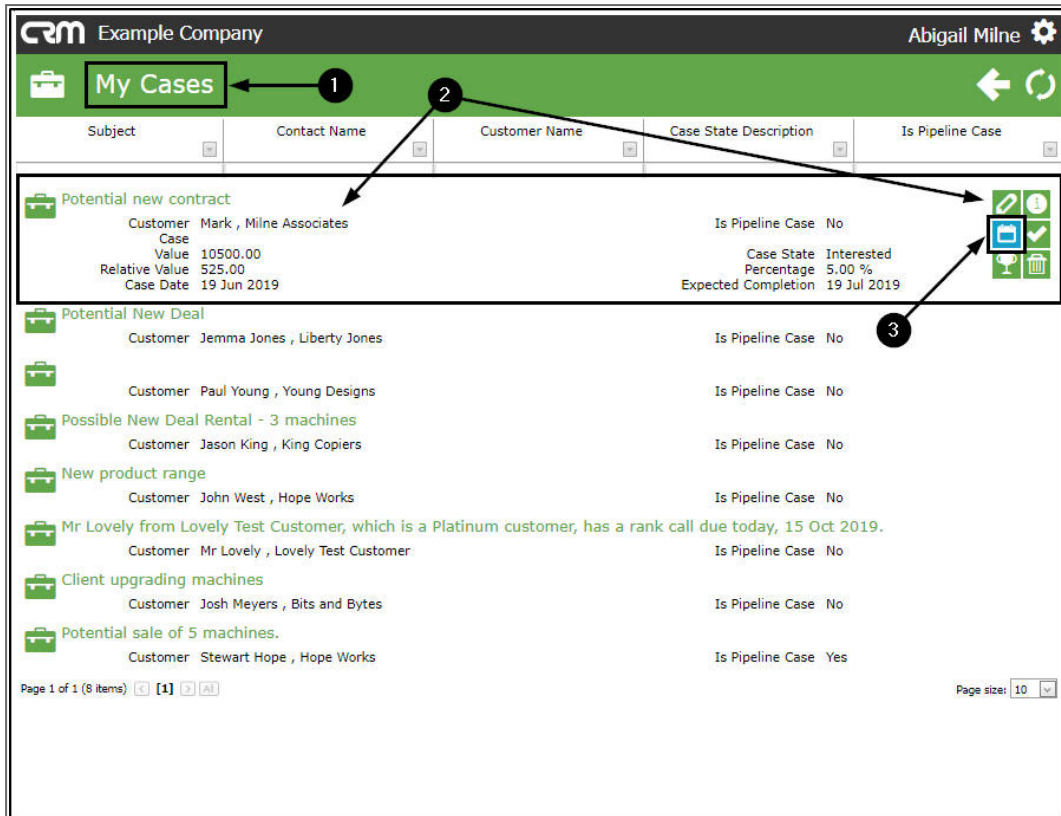


1. The Quote, **Quote Financials**, **Add Quote Items** and **Quote Items** frames will be expanded.
 - Ensure that you have filled in any mandatory fields [*] and then follow the **Link Quote Process** to create the new quote.
2. Either click on **Save** to keep the changes or
3. Click on **Back** to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

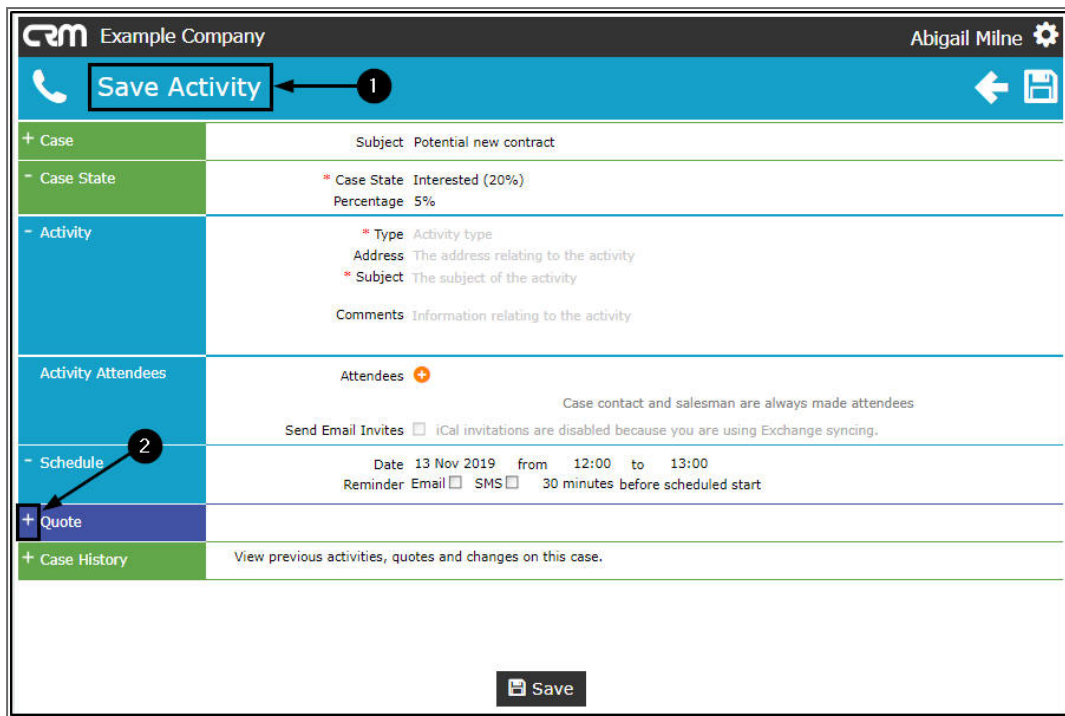


LINK A QUOTE TO AN ACTIVITY IN A CASE

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



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

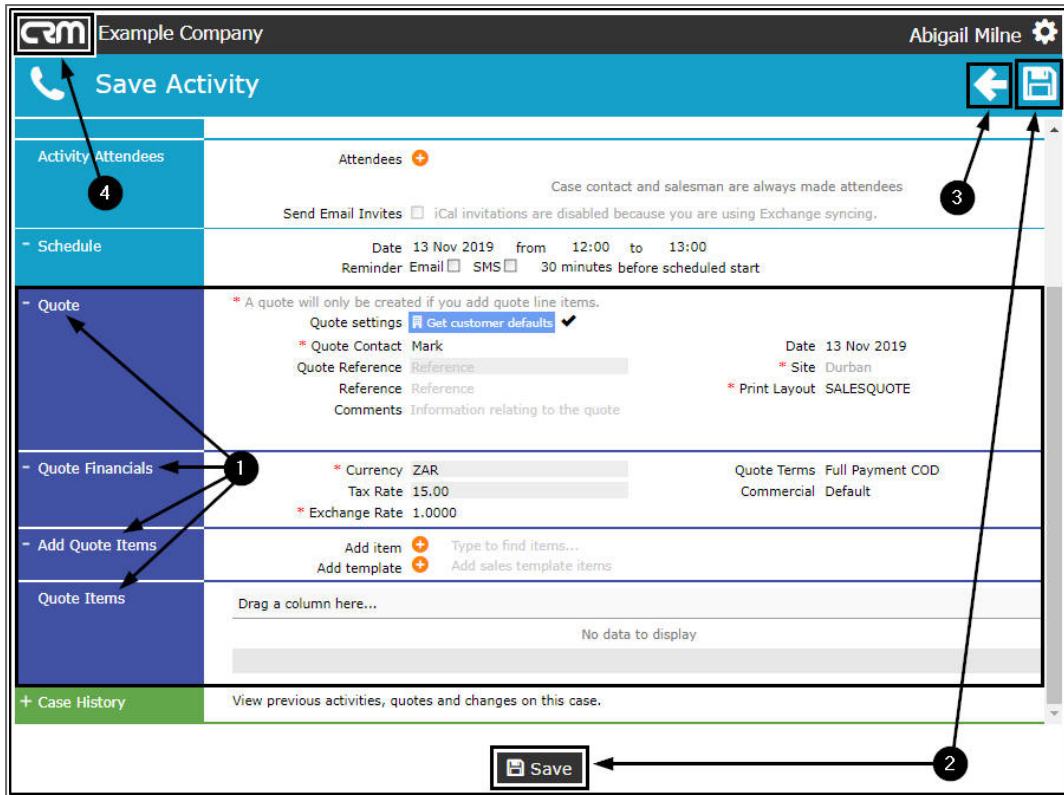


The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main action is 'Save Activity'. The form contains the following sections:

- Case:** Subject: Potential new contract
- Case State:** Case State: Interested (20%), Percentage: 5%
- Activity:** Type: Activity type, Address: The address relating to the activity, Subject: The subject of the activity, Comments: Information relating to the activity
- Activity Attendees:** Attendees (+), Send Email Invites: (iCal invitations are disabled because you are using Exchange syncing)
- Schedule:** Date: 13 Nov 2019, from 12:00 to 13:00, Reminder: Email , SMS (30 minutes before scheduled start)
- Quote:** (Callout 2 points here)
- Case History:** View previous activities, quotes and changes on this case.

A 'Save' button is located at the bottom center of the form.

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).

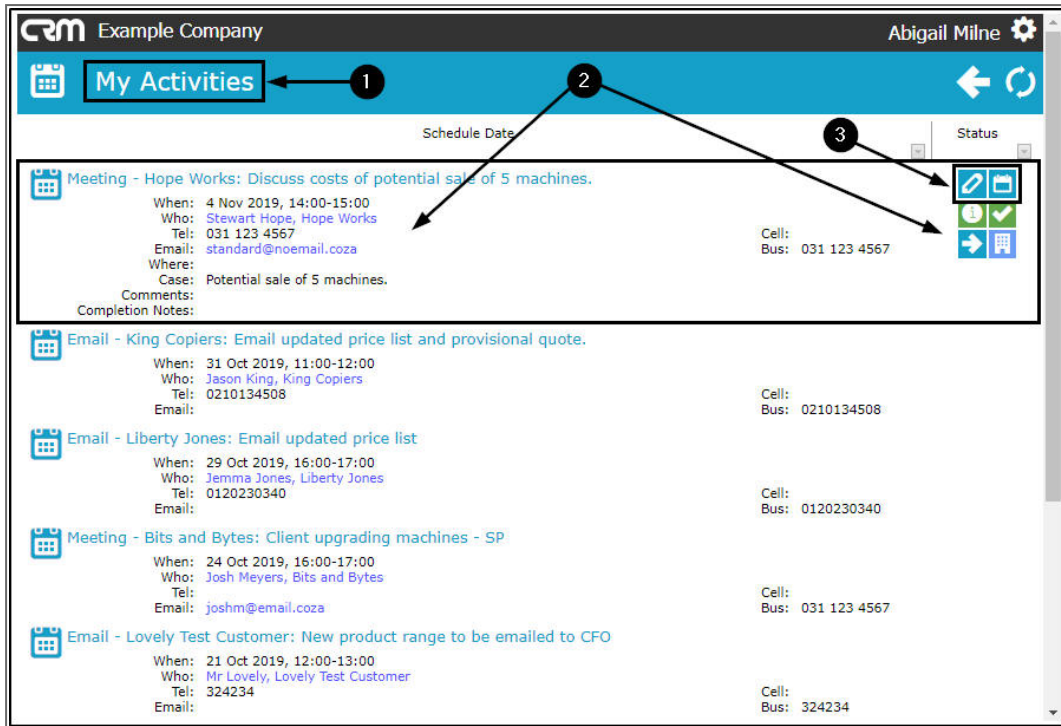


LINK A QUOTE WHEN EDITING AN ACTIVITY

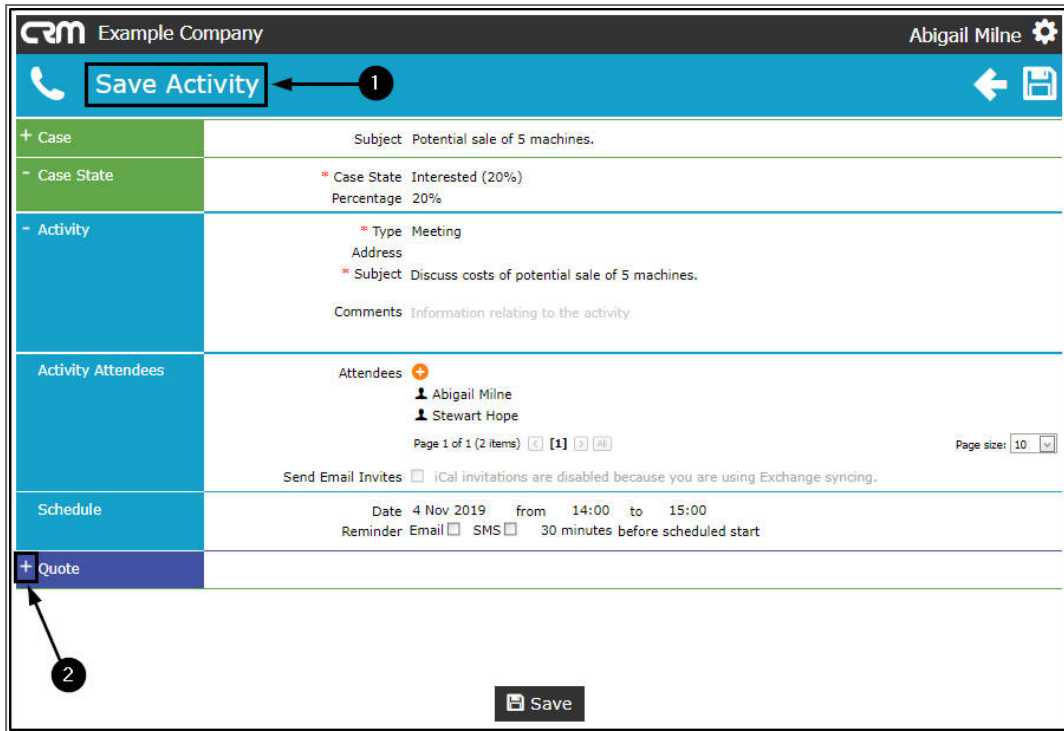
1. In the **Dashboard**,
2. Click on the **Activities** tile.



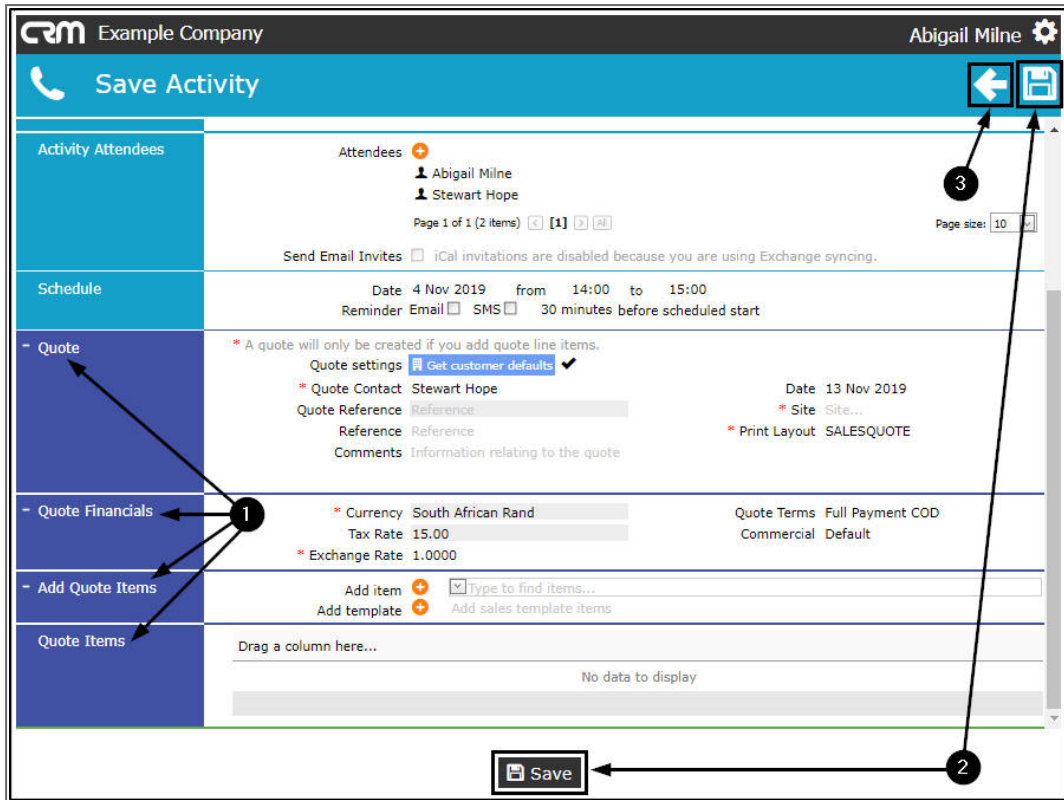
1. The **My Activities** page will open.
2. Hover over a selected Activity to reveal the **Action buttons**.
3. Click on either the **View/Edit this Activity** button or the **Reschedule this Activity** button.
 - (Either of these buttons will direct you to the Save Activity page where you can add a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



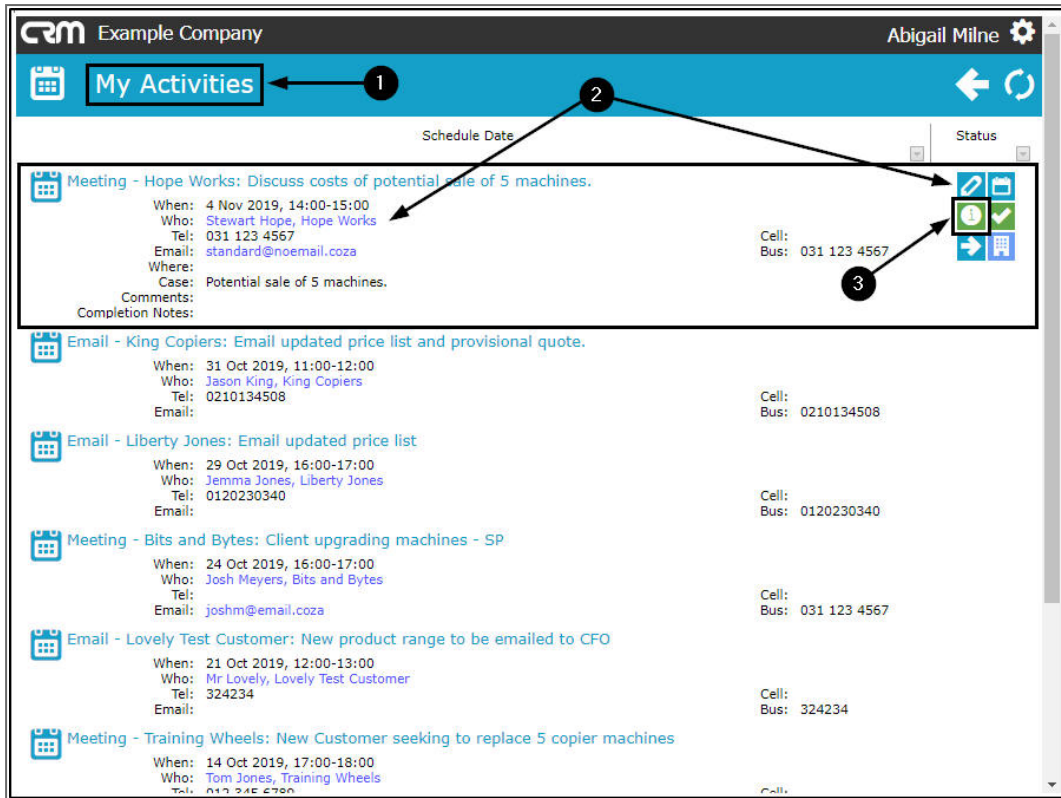
1. The **Save Activity page** will open.
2. Expand the **Quote** frame.



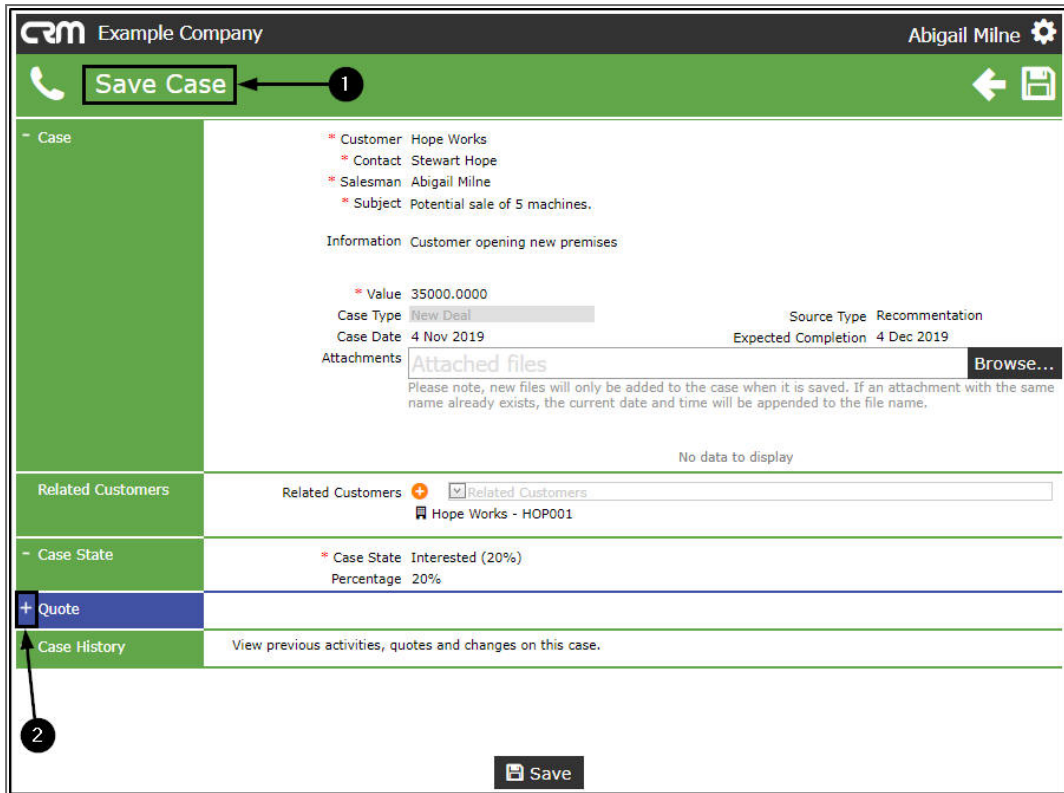
1. The Quote, **Quote Financials**, **Add Quote Items** and **Quote Items** frames will be expanded.
 - Ensure that you have filled in any mandatory fields [*] and then follow the **Link Quote Process** to create the new quote.
2. Either click on **Save** to keep the changes or
3. Click on **Back** to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



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.



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



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).

The screenshot shows the 'Save Case' interface in a CRM system. The header includes the CRM logo, 'Example Company', and the user name 'Abigail Milne'. The main content area is divided into several sections:

- Save Case:** A green header bar with a back arrow and a save icon. A callout '4' points to the back arrow.
- Related Customers:** A section showing 'Related Customers' with a sub-section 'Hope Works - HOP001'. A callout '3' points to the save icon in the header.
- Case State:** A section showing 'Case State Interested (20%)' and 'Percentage 20%'. A callout '1' points to the 'Quote' section.
- Quote:** A section with a blue background containing fields for 'Quote settings', 'Quote Contact: Stewart Hope', 'Quote Reference', and 'Comments'. It also shows 'Date: 13 Nov 2019', 'Site: Site...', and 'Print Layout: SALESQUOTE'. A callout '2' points to the 'Save' button at the bottom.
- Quote Financials:** A section showing 'Currency: South African Rand', 'Tax Rate: 15.00', and 'Exchange Rate: 1.0000'. A callout '1' points to this section.
- Add Quote Items:** A section with a plus sign and the text 'Add Quote Items'.
- Quote Items:** A section with the text 'Drag a column here...' and 'No data to display'.
- Case History:** A section with a plus sign and the text 'View previous activities, quotes and changes on this case.'

A 'Save' button is located at the bottom center of the interface.

LINK A QUOTE FROM CUSTOMER DASHBOARD WHEN EDITING A CASE

The screenshot shows a web browser window with the title 'Save Quote'. The address bar shows the URL: localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info. The browser's navigation bar includes icons for home, back, and forward. The application header is dark grey with the text 'Save Quote' and a save icon.

The main content area is divided into several sections:

- + Case**: Subject: New machine - test case
- Quote**:
 - * A quote will only be created if you add quote line items.
 - * Customer: Hope Works
 - * Quote Contact: Jane Alrich
 - Quote Reference: Reference
 - Reference: OR589
 - Comments: Information relating to the quote
 - Date: 18 Apr 2016
 - * Print Layout: SALESQUOTE
- + Quote Financials**: (Empty section)
- Quote Items**:
 - Add item: Add single item (+)
 - Add template: Add sales template items (+)
 - Drag a column here...
 - No data to display

At the bottom center of the page, there is a black button with a white document icon and the text 'Save'.

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

Save Quote

localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info

Save Quote

+ Case

Subject New machine - test case

- Quote

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

* Customer Hope Works

* Quote Contact Jane Alrich Date 18 Apr 2016

Quote Reference Reference * Print Layout SALESQUOTE

Reference OR589

Comments Information relating to the quote

+ Quote Financials

- Quote Items

Add item Add single item +

Add template Add sales template items +

Drag a column here...

No data to display

Save

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

Save Quote

localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info

Save Quote

+ Case Subject New machine - test case

- Quote

- * A quote will only be created if you add quote line items.
- * Customer Hope Works
- * Quote Contact Jane Alrich Date 18 Apr 2016
- Quote Reference Reference * Print Layout SALESQUOTE
- Reference OR589
- Comments Information relating to the quote

+ Quote Financials

- Quote Items

Add item Add single item +

Add template Add sales template items +

Drag a column here...

No data to display

Save

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

Save Quote

Subject: New machine - test case

Quote

- * A quote will only be created if you add quote line items.
- * Customer: Hope Works
- * Quote Contact: Jane Alrich
- Date: 18 Apr 2016
- Quote Reference: Reference
- * Print Layout: SALESQUOTE
- Reference: OR589
- Comments: Information relating to the quote

Quote Financials

Quote Items

- Add item: Add single item
- Add template: Add sales template items

Drag a column here...

No data to display

Save

- 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.

Save Quote
localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info...

Save Quote

+ Case

Subject **New machine - test case**

- Quote

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

*** Customer** Hope Works

*** Quote Contact** Jane Alrich **Date** 18 Apr 2016

Quote Reference *** Print Layout** SALESQUOTE

Reference OR589

Comments Information relating to the quote

- Quote Financials

*** Currency** **Quote Terms**

Tax Rate 14.00 **Commercial**

*** Exchange Rate** 1.0000

Payments	Payment Period
1	Full Payment COD
12	12 Months
6	6 Months

Add item Add single item

Add template Add sales template items

Drag a column here...

No data to display

Save

Help v2024.5.0.7/1.0 - Pg 26 - Printed: 21/08/2024

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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](#).

Save Quote
- □ X

← → ↻
localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=28&case_info
🔍 ⭐ ☰ 📄 🔔 ⋮

🗨️ 🏠 📱 ↶
Save Quote
📄

+ Case

Subject New machine - test case

- Quote

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

* **Customer** Hope Works

* **Quote Contact** Jane Alrich Date 18 Apr 2016

Quote Reference * **Print Layout** SALESQUOTE

Reference OR589

Comments Information relating to the quote

+ Quote Financials

- Quote Items

Add item +

Add template

Drag a column here...

Type	Code	Description	#
INN	SP2020	SP2020 Sprint Colour M	1
INN	2020-147K	Black toner SP2020	2
INN	SP19-147Y	Yellow Toner - SP1919	6
INN	SP19-147M	Magenta toner - SP1915	7
INN	2020-147M	Magenta toner SP2020	8
INN	2020-147C	Cyan toner SP2020	9
INN	CL-100-965	Cleaner	11

📄 Save

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

The screenshot shows the 'Save Quote' web application interface. The browser address bar indicates the URL: localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info. The application title is 'Save Quote'. The main content area is divided into several sections:

- Case:** Subject: New machine - test case
- Quote:**
 - * A quote will only be created if you add quote line items.
 - * Customer: Hope Works
 - * Quote Contact: Jane Alrich
 - Date: 18 Apr 2016
 - Quote Reference: * Print Layout: SALESQUOTE
 - Reference: OR589
 - Comments: Information relating to the quote
- Quote Financials:** (Empty)
- Quote Items:**
 - Add item:
 - Add template:
 - Table of items:

Type	Code	Description	#
INVN	SP2020	SP2020 Sprint Colour Ml	1
INVN	2020-147K	Black toner SP2020	2
INVN	2020-147M	Magenta toner SP2020	8
INVN	2020-147C	Cyan toner SP2020	9
INVN	2020-147L	SP2020 Clear Toner	24
INVN	2020-147Y	Yellow toner SP2020	10
INVN	20-753	SP2020 Fuser Unit	64

At the bottom of the interface, there is a 'Save' button.

- Click on the 'Add Item' button

Save Quote

localhost:50000/bpocm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info

Save Quote

+ Case Subject New machine - test case

- Quote

- * A quote will only be created if you add quote line items.
- * Customer Hope Works
- * Quote Contact Jane Alrich Date 18 Apr 2016
- Quote Reference Reference * Print Layout SALESQUOTE
- Reference OR589
- Comments Information relating to the quote

+ Quote Financials

- Quote Items

Add item INVN | SP2020 | SP2020 x +

Add template Add sales template items +

Drag a column here...

No data to display

Save

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

The screenshot shows a web browser window titled 'Save Quote' with the URL `localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info`. The interface includes a navigation bar with icons for home, back, and save. The main content area is divided into sections: Case, Quote, Quote Financials, and Quote Items.

Case Section: Subject: New machine - test case

Quote Section:

- * A quote will only be created if you add quote line items.
- * Customer: Hope Works
- * Quote Contact: Jane Alrich
- Date: 18 Apr 2016
- Quote Reference: * Print Layout: SALESQUOTE
- Reference: OR589
- Comments: Information relating to the quote

Quote Items Section:

- Add item: [INVN | SP2020 | SP2020 Sp](#) (+)
- Add template: [Add sales template items](#) (+)

Actions	Item Type	Item Code	Quantity	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
	INVN	SP2020	1	12250.00	9500.00		9500.00	10830.00
				12250.00	9500.00	0.00	9500.00	10830.00

At the bottom of the interface is a 'Save' button.

- 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

Save Quote
- □ X

localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info

Save Quote
📄

+ Case

Subject New machine - test case

- Quote

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

* Customer Hope Works

* Quote Contact Jane Alrich Date 18 Apr 2016

Quote Reference * Print Layout SALESQUOTE

Reference OR589

Comments Information relating to the quote

+ Quote Financials

- Quote Items

Add Item
INVN | SP2020 | SP2020 Sp

Add template
📄











Actions	Item Type	Item Name	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
🗑️	INVN	SP1020 Standard Package	12250.00	9500.00		9500.00	10830.00
			12250.00	9500.00	0.00	9500.00	10830.00

📄 Save

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

The screenshot displays the 'Save Quote' web application. The interface includes a sidebar on the left with sections for Case, Quote, Quote Financials, and Quote Items. The main content area shows the following details:

- Case:** Subject: New machine - test case
- Quote:**
 - A quote will only be created if you add quote line items.
 - Customer: Hope Works
 - Quote Contact: Jane Alrich
 - Date: 18 Apr 2016
 - Quote Reference: Reference
 - Reference: OR589
 - Comments: Information relating to the quote
 - Print Layout: SALESQUOTE
- Quote Items:**
 - Add item: INVN | SP2020 | SP2020 Sp
 - Add template: SP1020 Standard Package

Actions	Item Type	Item Code	Quantity	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
 	INVN	SP2020	1	12250.00	9500.00		9500.00	10830.
 	INVN	SP1020	1	7500.00	8625.00	8625.00	8625.00	9832.
 	INVN	1020-478	1	0.00	0.00	0.00	0.00	0.
 	INVN	1020-147K	1	350.00	402.50	402.50	402.50	458.
 	INVN	1020-147C	1	0.00	0.00	0.00	0.00	0.

At the bottom of the interface is a 'Save' button.

- 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.

Case Subject: New machine - test case

Quote

- * A quote will only be created if you add quote line items.
- * Customer: Hope Works
- * Quote Contact: Jane Alrich
- Date: 18 Apr 2016
- Quote Reference: Reference
- Reference: OR589
- Comments: Information relating to the quote
- * Print Layout: SALESQUOTE

Quote Financials

Quote Items

Add Item: INVN | SP2020 | SP2020 Sp

Add template: [SP1020 Standard Package](#)

Actions	Item Type	Item Code	Quantity	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
	INVN	SP2020	1	12250.00	9500.00		9500.00	10830.00

Quote Item Description: SP2020 Sprint Quantity: 1 Unit Cost: 12250.000000 Item Price: 9500.00

[Update Done](#)

	INVN	SP1020	1	7500.00	8625.00	8625.00	8625.00	9832.50
	INVN	1020-478	1	0.00	0.00	0.00	0.00	0.00

Save

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

Save Quote
X +

localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info

Save Quote
📄

Case

Subject New machine - test case

Quote

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

* Customer Hope Works

* Quote Contact Jane Alrich Date 18 Apr 2016

Quote Reference * Print Layout SALESQUOTE

Reference OR589

Comments Information relating to the quote

Quote Financials

Quote Items

Add item INVN | SP2020 | SP2020 Sp +

Add template SP1020 Standard Package +

Actions	Item Type	Item Code	Quantity	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
	INVN	SP2020	1	12250.00	9500.00		9500.00	10830.00
	INVN	SP1020	1	7500.00	8625.00	8625.00	8625.00	9832.50
	INVN	1020-478	1	0.00	0.00	0.00	0.00	0.00
	INVN	1020-147K	1	350.00	402.50	402.50	402.50	458.85
	INVN	1020-147C	1	0.00	0.00	0.00	0.00	0.00

Save

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

The screenshot shows the 'Save Quote' interface with the following sections:

- Case:** Subject: New machine - test case
- Quote:**
 - * A quote will only be created if you add quote line items.
 - * Customer: Hope Works
 - * Quote Contact: Jane Alrich
 - Quote Reference: Reference
 - Reference: OR589
 - Comments: Information relating to the quote
 - Date: 18 Apr 2016
 - * Print Layout: SALESQUOTE
- Quote Financials:**
 - * Currency: South African Rand
 - Tax Rate: 14.00
 - * Exchange Rate: 1.0000
 - Quote Terms: 12 Months
 - Commercial: Default
- Quote Items:**
 - Add Item: INVN | SP2020 | SP2020 Sp
 - Add template: SP1020 Standard Package

Actions	Item Type	Item Code	Quantity	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
	INVN	SP2020	1	12250.00	9500.00	1235.00	9500.00	10830.00
	INVN	SP1020	1	7500.00	8625.00	1121.25	8625.00	9832.50
	INVN	1020-478	1	0.00	0.00	0.00	0.00	0.00
	INVN	1020-147K	1	350.00	402.50	52.33	402.50	458.85

A red box highlights the 'Payment per Period' column in the table above.

At the bottom of the interface is a **Save** button.

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

Save Quote

Case Subject: New machine - test case

Quote

- * A quote will only be created if you add quote line items.
- * Customer: Hope Works
- * Quote Contact: Jane Alrich Date: 18 Apr 2016
- Quote Reference: Reference * Print Layout: SALESQUOTE
- Reference: OR589
- Comments: Information relating to the quote

Quote Financials

- * Currency: South African Rand Quote Terms: 12 Months
- Tax Rate: 14.00 Commercial: Default
- * Exchange Rate: 1.0000

Quote Items

Add item: INVN | SP2020 | SP2020 Sp

Add template: SP1020 Standard Package

Actions	Item Type	Item Code	Quantity	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
	INVN	SP2020	1	12250.00	9500.00	1235.00	9500.00	10830.00
	INVN	SP1020	1	7500.00	8625.00	1121.25	8625.00	9832.50
	INVN	1020-478	1	0.00	0.00	0.00	0.00	0.00
	INVN	1020-147K	1	350.00	402.50	52.33	402.50	458.85

Save

See Also:

- [View / Print / Email the Quote](#)

CRM.015.001