

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

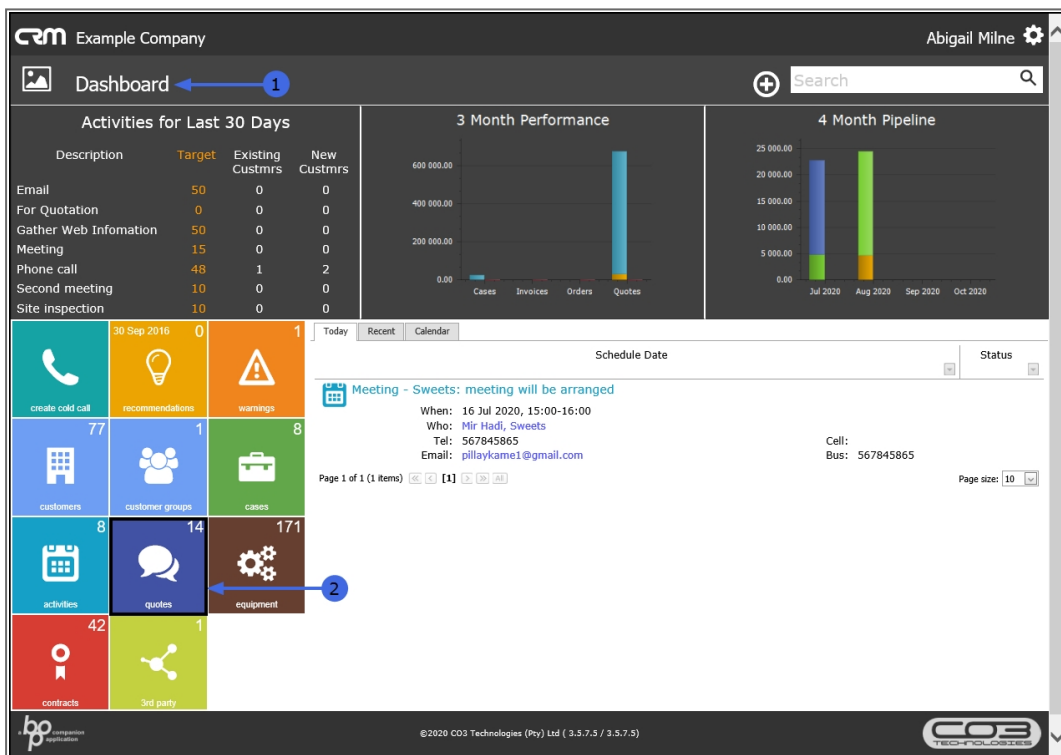
SALES

QUOTES - VIEW QUOTE IN CRM

Sales Quotes that have been created or edited in BPO2 will automatically pull through to CRM.

Ribbon Access:

- From your web browser, navigate to the CRM **Homepage**.
- Click on the **Quotes** tile.



- The **Quotes** listing page will open.
- The Quote you have Created, Edited or Cloned in **BPO** is displayed in the Quotes list.

You can use the functionality on this page to:

- [View, Edit or Delete Quote](#),
- [Create a Copy \(Clone\)](#) of the quote,
- [Accept Quote](#) the quote or
- [Reject Quote](#) the quote.

The screenshot shows the CRM interface for 'Example Company' with user 'Abigail Milne'. The 'Quotes' page is active, displaying a table of quotes. Annotations 1-6 point to specific UI elements: 1 points to the 'Quotes' header, 2 points to a quote description, 3 points to the 'Clone' icon, 4 points to the 'View' icon, 5 points to the 'Accept' icon, and 6 points to the 'Reject' icon.

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000292	BIG0001	Big Bargains	AB01_SalesStudio	241500.00	ZAR	27 May 2020	New Quote	Yes
QT0000301	HOP001	Hope Works (Pty) Ltd	Test Marc	242921.94	ZAR	10 Jul 2020	New Quote	No
QT0000302	HOP001	Hope Works (Pty) Ltd	Test Marc 02	1104.00	ZAR	10 Jul 2020	New Quote	No
QT0000303	HOP001	Hope Works (Pty) Ltd	Copy of Test Marc 02	1104.00	ZAR	10 Jul 2020	New Quote	No
QT0000304	HOP001	Hope Works (Pty) Ltd	Test Marc 03 From BPO	3450.00	ZAR	10 Jul 2020	Customer Accepted Quote	No
QT0000305	BIG0001	Big Bargains	sales package	484506.50	ZAR	13 Jul 2020	Salesman Released Quote	No
QT0000306	SWE0001	Sweets	default item	2794.50	ZAR	13 Jul 2020	New Quote	No
QT0000307	BIG0001	Big Bargains	this is from BPO for CRM	621.00	ZAR	13 Jul 2020	New Quote	No
QT0000308	HOP001	Hope Works (Pty) Ltd	Test Matt01	2150.50	ZAR	13 Jul 2020	Manager Approved Quote	No
QT0000309	HOT0001	Hot Pink	Test Matt02	2150.50	ZAR	13 Jul 2020	New Quote	No
QT0000310	DER001	Derton / Technologies	Test Matt03	299.54	ZAR	13 Jul 2020	New Quote	No
QT0000311	KIN0001	King Copiers	KC001	12075.00	ZAR	14 Jul 2020	New Quote	No
QT0000312	BIG0001	Big Bargains	BB001	6077.89	ZAR	14 Jul 2020	New Quote	No
QT0000313	BIT001	Bits and Bytes	CloneQuote-AB02	17677.10	ZAR	15 Jul 2020	New Quote	No

Related Topics

- [Add Quote](#)
- [Edit Quote](#)
- [Delete Quote](#)
- [View Quote](#)
- [Accept and Reject a Quote](#)

- [Print and Export a Sales Quote](#)
- [Forward Navigation](#)
- [Apply Project Methodology](#)
- [Clone a Quote](#)
- [Export a Quote](#)
- [Generate a Sales Order](#)
- [Creating a Quote from a Call](#)
- [Creating a Quote from a Project](#)
- [Link Quote Items to a Work Order](#)
- [CRM Basics - Quotes](#)
- [View Quote in CRM](#)
- [Add new Quote in Sales Studio](#)

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