SALES

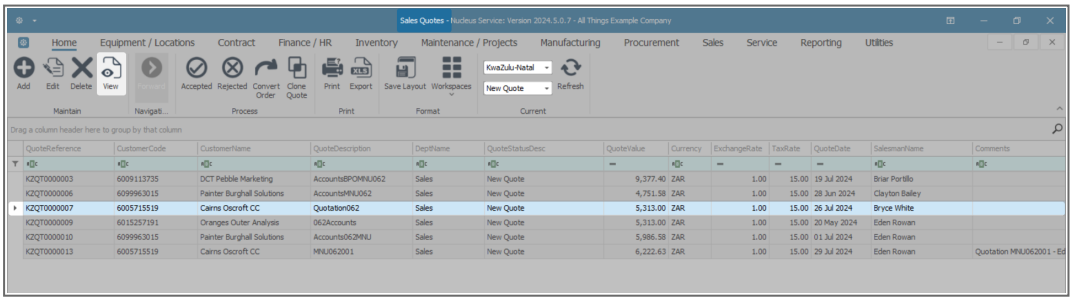
QUOTES – VIEW SALES QUOTE

Ribbon Select **Sales > Quotes**

- The **Sales Quotes** listing screen will be displayed.
- Select the **Site** the quote was created for.
    - The example has **KwaZulu-Natal** selected.
- Select the **Status** for the Sales Quote you wish to view.

> **Note** that a Sales Quote can be **viewed** in any **Status**.

    - The example has **New Quote** selected.
- Select the **row** of the quote you wish to view.
- Click on **View**.



- The **View Customer Quote - KZQT [ ]** screen will display.

The Customer Quote contains:

- The Customer Details frame.
- The Related References frame.

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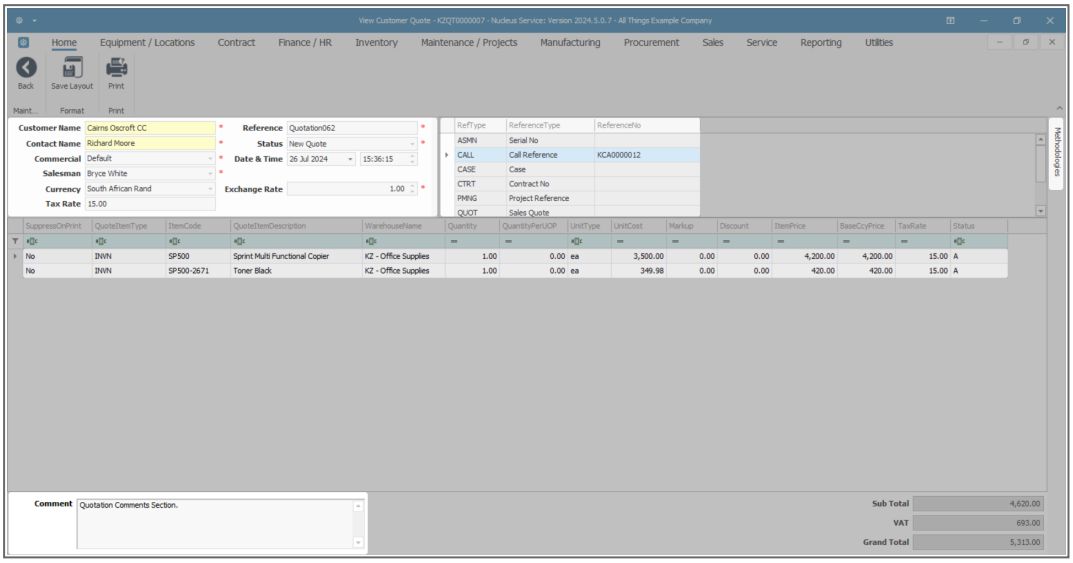
- The Quote Items frame.
- The Methodologies tab.
- The Comments field.



VIEW METHODOLOGIES

- Click on the **Methodologies** tab, to expand the frame.
- Any methodologies linked to the quote will be listed.
- Clicking anywhere outside the Methodologies frame will **hide the frame**.
- To keep the frame from closing, **pin the frame** to the screen by clicking on the pin button. Clicking on the pin again, will allow you to close the frame once again. (Refer to Docking Panels for detailed handling on this topic.)
- **Close** the screen when you are done.

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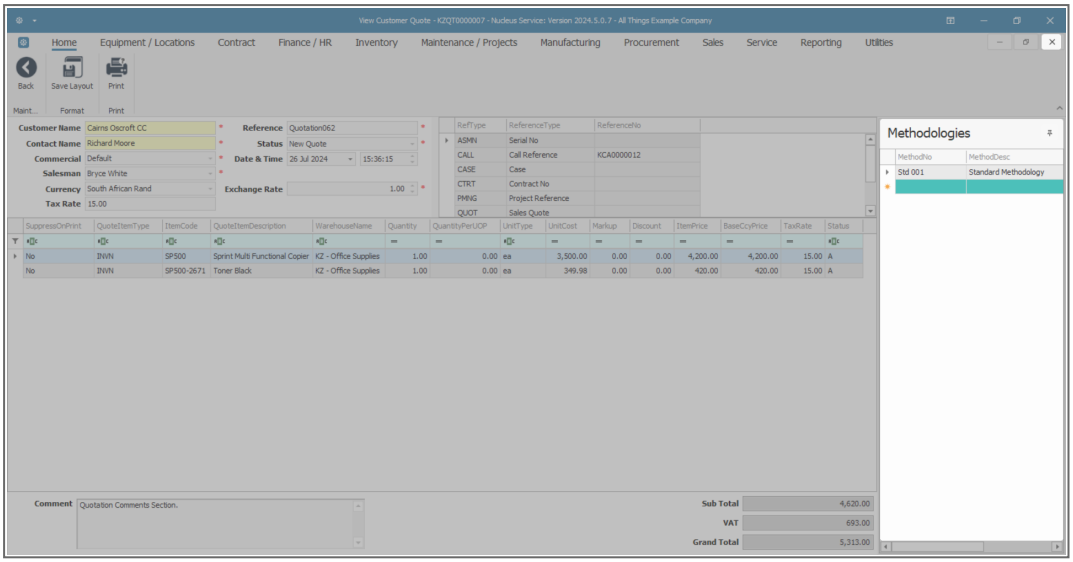

Related Topics

- 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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