

SALES

QUOTES - EXPORT

You can use the **Export** button to export the Quotes data grid information to Excel.

Ribbon Select **Sales > Quotes**



- The **Sales Quotes** listing screen will be displayed.

SELECT SITE AND STATUS

- Select the **Site** you wish to work in.
 - In this image, **KwaZulu-Natal** has been selected.
- Select the **Status**.
 - The **Sales Quotes** listing screen opens in the **N - New Quote** Status by default.
 - Click on the **drop-down arrow** to change the **Status**.
 - The example has **Customer Accepted Quote** selected and will list all the **Customer Accepted Quotes** in the Quotes listing screen.

You can Export a Quote list in any Status.

QuoteReference	CustomerCode	CustomerName	QuoteDescription	DeptName	QuoteStatusDesc	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments
K2QT0000012	6005432979	VVFS Three Management	MNUQuote062	Sales	Customer Accepted Quote	483.00	ZAR	1.00	15.00	01 Nov 2023	Cal Johns	
K2QT0000011	6027650874	Zinc Withington Consulting	QuotesMNU	Sales	Customer Accepted Quote	4,830.00	ZAR	1.00	15.00	19 Dec 2023	Chase Jacobs	
K2QT0000001	6005715519	Carns Oscoft CC	QuotesMNU062	Sales	Customer Accepted Quote	4,830.00	ZAR	1.00	15.00	07 Jun 2024	Eden Rowan	
K2QT0000004	6015257191	Oranges Outer Analysis	062Accounts	Sales	Customer Accepted Quote	5,313.00	ZAR	1.00	15.00	26 Jul 2024	Eden Rowan	
K2QT0000005	6099963015	Painter Burghall Solutions	Account062MNU	Sales	Customer Accepted Quote	1,725.00	ZAR	1.00	15.00	26 Jul 2024	Eden Rowan	
K2QT0000002	600656152	Gardening Pechold Outsourcing	MNU062Quote	Sales	Customer Accepted Quote	6,141.00	ZAR	1.00	15.00	17 Jul 2024	Nicolas Franklin	

- Click on a **Column Header** to quickly sort the data in **Ascending** or **Descending** order.
- In this image, the data grid has been sorted by **Quote Reference** in **Ascending** order.
- Click on the **Export** action button.

- This will open **Excel** with a new spreadsheet and load all the data from the data grid into that spreadsheet.
- You can then **view the data, search for data**, prepare the spreadsheet for **printing**, etc.

QuoteReference	CustomerCode	CustomerName	QuoteDescription	DeptName	QuoteStatusDesc	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments
KZQT0000001	600571519	Cainis Ocroft CC	QuotesMNU062	Sales	Customer Accepted Quote	4,830.00	ZAR	1.00	15.00	07 Jun 2024	Eden Rowan	
KZQT0000002	600656152	Gardening Pechold Outsourcing	MNU062Quote	Sales	Customer Accepted Quote	6,141.00	ZAR	1.00	15.00	17 Jul 2024	Nicolas Franklin	
KZQT0000004	6015257191	Oranges Outer Analysis	062Accounts	Sales	Customer Accepted Quote	5,313.00	ZAR	1.00	15.00	26 Jul 2024	Eden Rowan	
KZQT0000005	6099963015	Painter Burghall Solutions	Accounts062MNU	Sales	Customer Accepted Quote	1,725.00	ZAR	1.00	15.00	26 Jul 2024	Eden Rowan	
KZQT0000011	6027650874	Zinc Withrington Consulting	QuotesMNU	Sales	Customer Accepted Quote	4,830.00	ZAR	1.00	15.00	19 Dec 2023	Chase Jacobs	
KZQT0000012	6005432979	VxFS Three Management	MNUQuote062	Sales	Customer Accepted Quote	483.00	ZAR	1.00	15.00	01 Nov 2023	Cal Johns	

- **Close** the spreadsheet screen when you are done.

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](#)

MNU.062.013

