

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 <u>any</u> Status.



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- 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.

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- 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.



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• **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
- <u>Apply Project Methodology</u>
- 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
- <u>CRM Basics Quotes</u>
- View Quote in CRM
- Add new Quote in Sales Studio

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