

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

# **SALES STUDIO QUOTES**

## **VIEW QUOTES**

All quotes created in Sales Studio can be found in the **Sales Quotes** listing screen after selecting the applicable **Site** and **Status**.

Follow the process set out below to **view** the current quotes on the system.

## **Version Compatibility**

- BPO2 v 2.3.0.2
- Sales Studio v 1.0.0.21
- Configurator v 2.2.0.0
- CRM v 3.5.7.5

Ribbon Access: Sales Studio > Sales > Quotes

<b>17</b>	Ŧ	BPO Sales Studio: Version 1.0.0.21 - Example Company	-	×
	Sales	Configuration		
Quotes				

## **SELECT THE SITE AND STATUS**

- 1. The Sales Quotes listing screen will open.
- 2. The relevant **Site** will need to be selected,
- 3. before quotes will be displayed in the data grid.



## View Quotes

	Ŧ					E alar	Ounter BB(	) Sales Studio:	V	1 Formula (	·		2		- 0	×
"	Home	Sale	- CF	guration	1	- Sales	Quotes - Bro	J Sales Studio:	version 1.0.0.2	1 - Example v	company		1			~ 8 ×
Add	Edit	Delet		Forward	Release for A	Approve Decline	Customer (	Customer Conv	ert Print	Save Layout	Workspaces	Select Site New Quote Include Sub-ordi	antra 🔲	• • Refre		
	Maint	tain		Navigati	Approval Internal P	Processing	Accepted I	Rejected Orde	er •	Form	•	Include Sub-oral	Cur			
Drag a cr				by that colum		roccomy a	00000		4 1111 4				3			//
	Referen		CustomerNan	-	uoteStatusDesc	QuoteDescription	Currency	QuoteValue	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Approved	ApproverName	ApprovalCom	ment
9 8 <b>0</b> 0			∎¢			8 <b>0</b> 0	R C	=	=	=	R C	e 🖸 c	REC.	- C -	* <b>0</b> ¢	
				4												
Open Wi	indows 🕶														17 Oct 2020	÷ //

- 1. Click on the drop-down arrow in the **Site** field to display the **Site Name** menu.
- 2. Select from the list the particular site that you wish to view.

	Ŧ				6-1				N 4 0	0.34 5	mple Compa				_	
")	_				Sa	les Quot	es - BPU S	ales Studio	: version 1.u	.u.z i - Exa	imple Compa	iny		~	_	
	Home	Sales Con	iguration			0		0	-	P	2		Select	Site	<b></b>	
Add	Edit I	Delete View	Forward		Approve	Decline	Customer	r Customer	Convert		Save Layout		ID 1	M Name		efresh
	Maintai	n	Navigati "	Approval Interna	al Processing			d Rejected		Print 4	Form	•	2	Pretoria Cape Town	_	
Drag a ci		er here to group											Site	Bloemfontein A New Test Site		
	Reference	CustomerName	Quot	eStatusDesc	QuoteDescri	iption	Currency	QuoteValue	Exchange	Rate TaxRa	ate QuoteDat	e SalesmanN				lomment
P ROC		R <b>O</b> C	R <b>O</b> C		# C		n 🖬 c	-	-	-	n 🖬 c	R <b>O</b> C	x			
	ndows <del>•</del>					c	apture scr								19 Oct	



### **GENERAL BPO2 INTERFACE FUNCTIONALITY**

The following basic BPO2 functionality applies in this screen:

- 1. Format:
- Save Layout
- Workspaces
- Save Filter
- 2. Current:
  - Refresh: Clicking on this button will update the currently displayed page.
- 3. Open Windows:
  - Open Windows

#### 4. Data Grids:

• Refer to <u>Using BPO Data Grids</u> and <u>Data Grid Filtering</u> for further information regarding data grid functionality that can be utilised here.

MNU.168.001