

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

SALES STUDIO QUOTES

ADD RELATED ITEMS

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 **add Related Items** to a quote in 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

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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.



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- 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 contains the quote that you wish to link **Related Items** to.

Note 1: If you are creating a new quote, you do <u>not</u> need to select the Status. If you are linking Related Items to a current quote then you <u>will</u> need to select the Status.

Note 2: Only quotes in Status: 'New Quote' or 'Salesman Released Quote' can have Related Items added to them.

GENERAL BPO2 INTERFACE FUNCTIONALITY

The following basic BPO2 functionality applies in this screen:

- 1. Format:
- <u>Save Layout</u>
- 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.

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