

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

SALES STUDIO QUOTES

CONVERT QUOTE TO ORDER

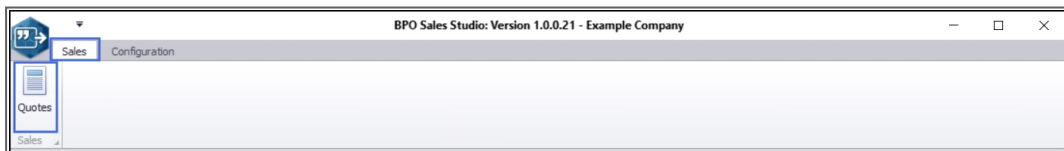
All quotes created in Sales Studio can be found in the **Sales Quotes** listing screen after selecting the applicable **Site** and **Status**.

Follow the process below to **Convert a Quote to an Order** in the system.

Version Compatibility

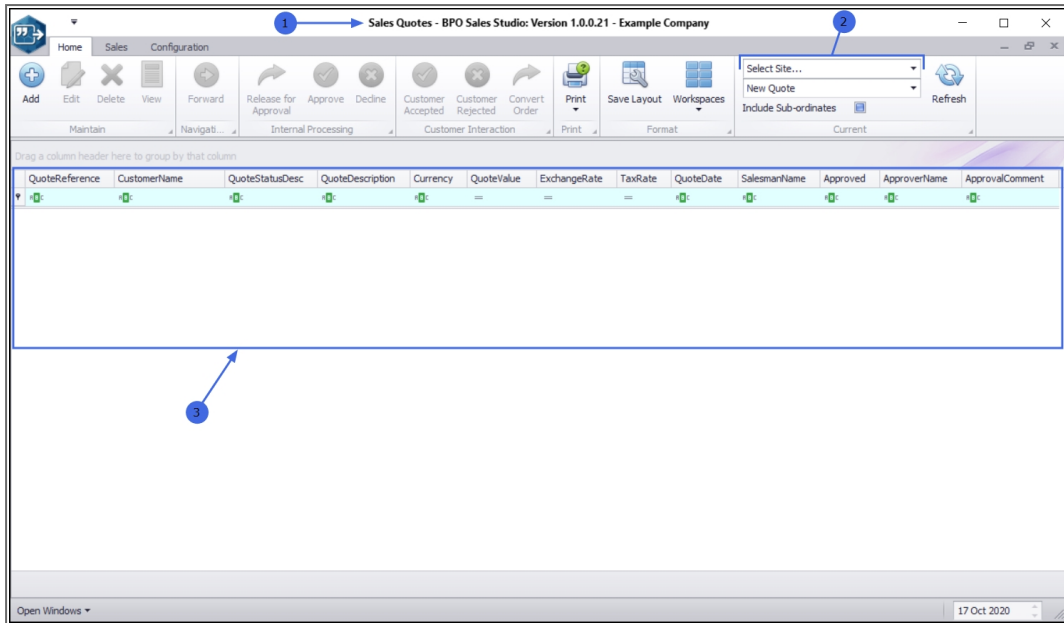
- BPO2 v 2.3.0.2
- Sales Studio v 1.0.0.21
- Configurator v 2.2.0.0
- CRM v 3.5.7.5

Ribbon Access: Sales Studio > Sales > Quotes



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.



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 **Convert to an Order**.

Note: Only quotes in Status: ' ... ' can be Converted to an Order.

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 [Using BPO Data Grids](#) and [Data Grid Filtering](#) for further information regarding data grid functionality that can be utilised here.

MNU.168.017

