

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

SALES

INTRODUCTION TO QUOTES

This manual will give you an overview of the Sales Quotes screen and its related functionality.

A Sales Quote allows a customer to see the costs that will be involved for desired work or parts required. Upon customer approval, the quote can be converted into a Sales Order and then processed as either a [POS Sale](#), [New Deal Sale](#) or [New Deal Rental](#). Where additional work or parts are required on a current service call or project, the quote items will be added to the call or project work order to process.

Sales Quotes can be created in **BPO**, **CRM** and **Sales Studio**.

- If created in **CRM**, the Quote will need to be accepted by the customer before the quote will be active and available for editing in **BPO**.
- If created in **Sales Studio**, the Quote can only be **Viewed** and any **changes** to the Quote must be done via **Sales Studio** due to the additional information that can be linked.
- Once the Quotes have been approved in either **CRM** or **Sales Studio**, the remainder of the sales process will be done in **BPO**.

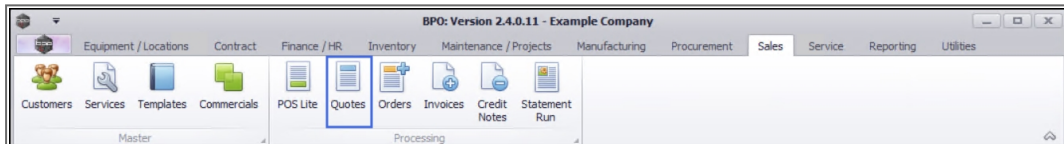


Note the following:

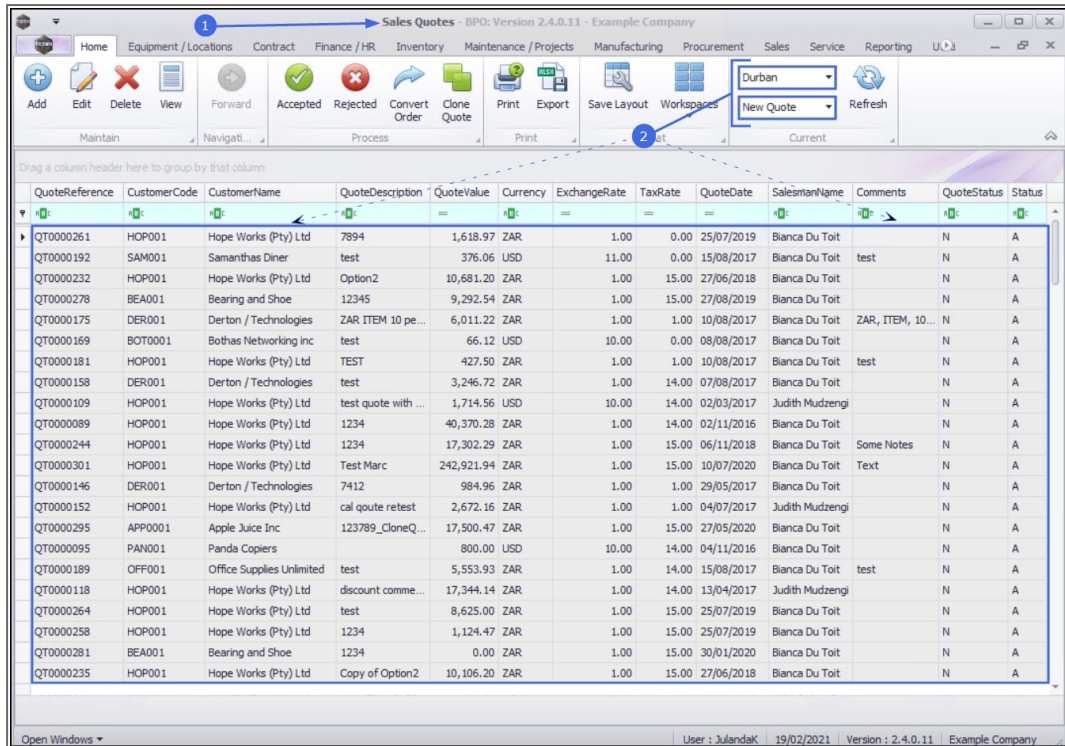
- You must have a [customer](#) set up in order to create a quote.

- Quotes can be raised against customers on hold. The System Validation will prevent the creation of a Sales Order until the Customer has been released from hold.
- If the items on a quote are ordered on a regular basis by a customer then the quote can be cloned to save time and ensure continuity.
- The use of **Sales Templates** is not supported in **BPO2**, as **Sales Studio** has an improved template functionality. Sales Templates can be applied to Quotes in **CRM** only where Sales Studio does not exist.

Ribbon Access: Sales > Quotes

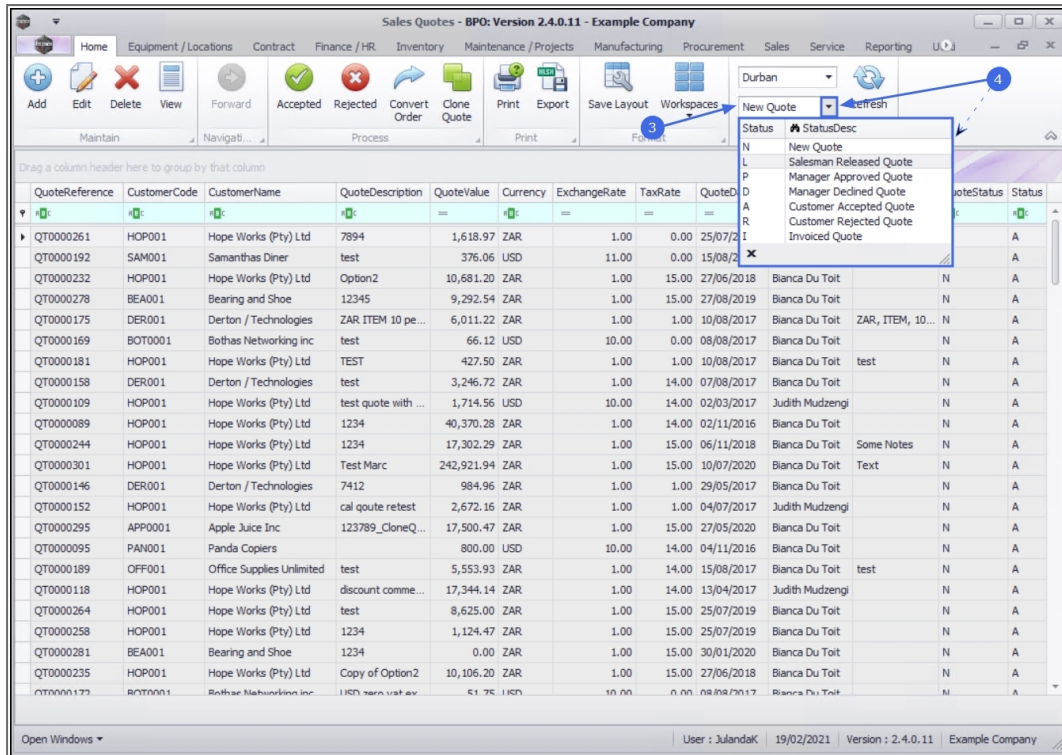


1. The **Sales Quotes** listing screen will display.
2. The list of all the Sales Quotes will be filtered using the **Site** and **Status** selected.



SALES QUOTE STATUS

1. The **Sales Quotes** listing screen opens in the **N - New Quote** Status by default.
2. Click on the Status down **arrow** to display the **Status** selection options;
 - **L - Salesman Released Quote**
 - **P - Manager Approved Quote**
 - **D - Manager Declined Quote**
 - **A - Customer Accepted Quote**
 - **R - Customer Rejected Quote**
 - **I - Invoiced Quote**

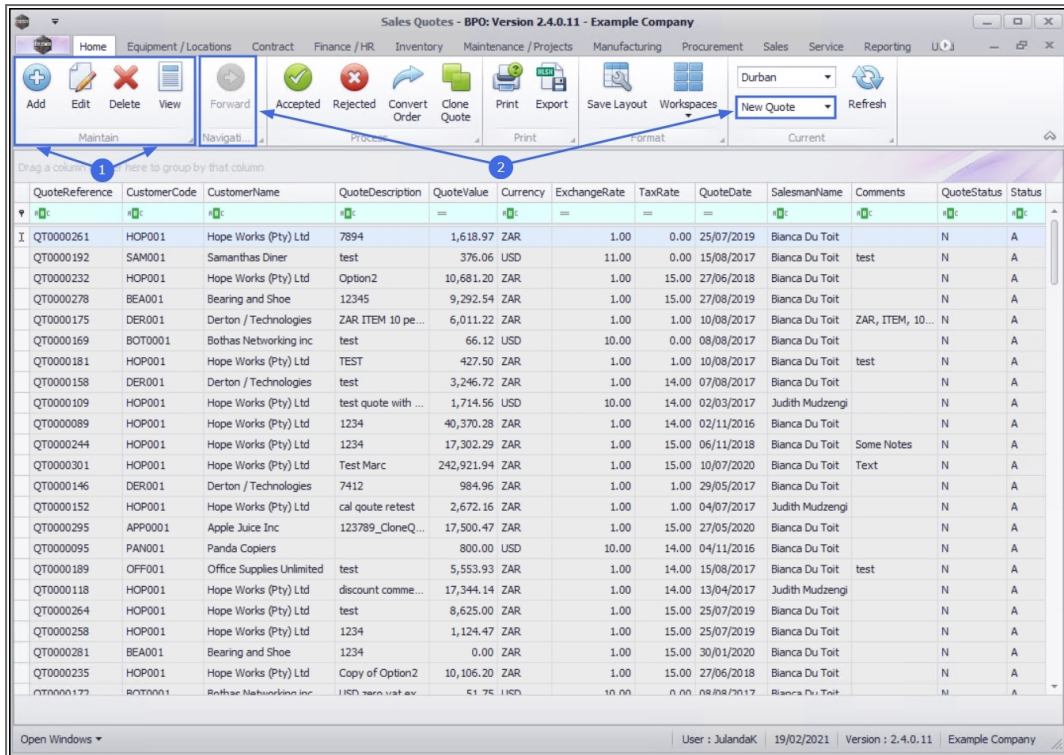


RIBBON TOOL BAR

The Sales Quote ribbon action buttons will be available (bold) or unavailable (greyed out) depending on the status selection.

QUOTES MAINTAIN BUTTONS

1. From the Maintain ribbon section you can choose to **Add**, **Edit**, **Delete** or **View** a Sales Quote.
2. Note that the **Forward** button is greyed out in the **New Quote** Status and can be accessed when the Status is set to **Quote Invoiced**. This gives you the ability to navigate to the invoice created at the end of this sales process.

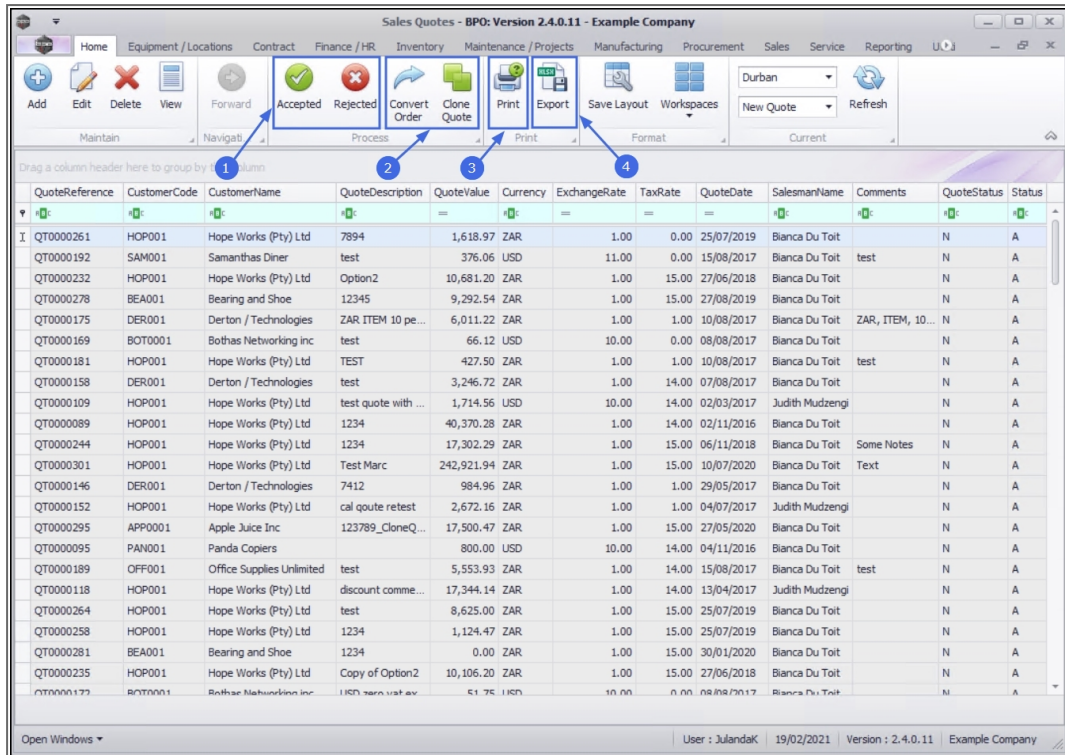


QUOTES PROCESS BUTTONS

1. On the Process ribbon section you can have Quote [Accepted](#) or [Rejected](#) buttons.
2. You can also [Convert Order](#) and [Clone Quote](#).

PRINT SALES QUOTE

3. From the Print ribbon section you can [Print](#) a Sales Quote and or
4. **Export** will allow you to export the Sales Quote listing screen in the current Status, to a Microsoft Excel spreadsheet.



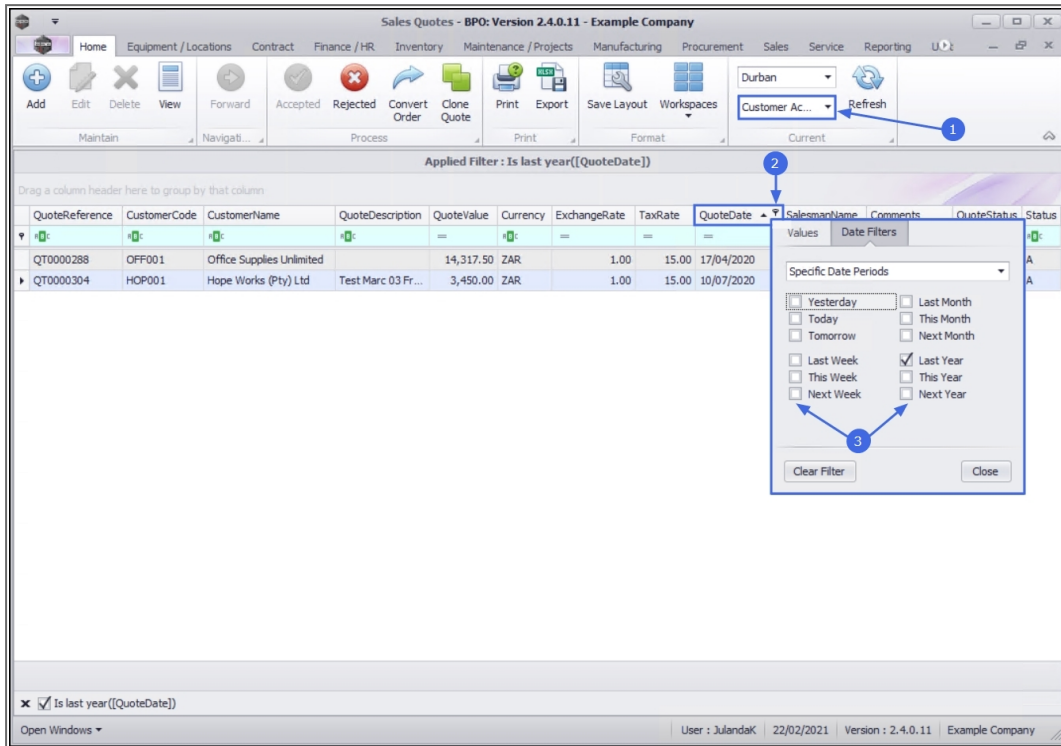
SALES QUOTE LISTING SCREEN

USING FILTERS

For the purpose of this example, the list of Customer Accepted Sales Quotes has been filtered using the Quote Date.

1. Change the **Status** to **Customer Accepted Quote**.
 - The Sales Listing screen will display only Sales Quotes with a QuoteStatus [A].
2. Click on the filter next to **QuoteDate** to display the **Date Filters** selection box.
3. Click in the tick box(es) to choose the date(s) you wish to list.
 - The example has 'Last Year' selected.
 - Note that the Sales listing screen updated with the Sales Quotes from Last Year only.

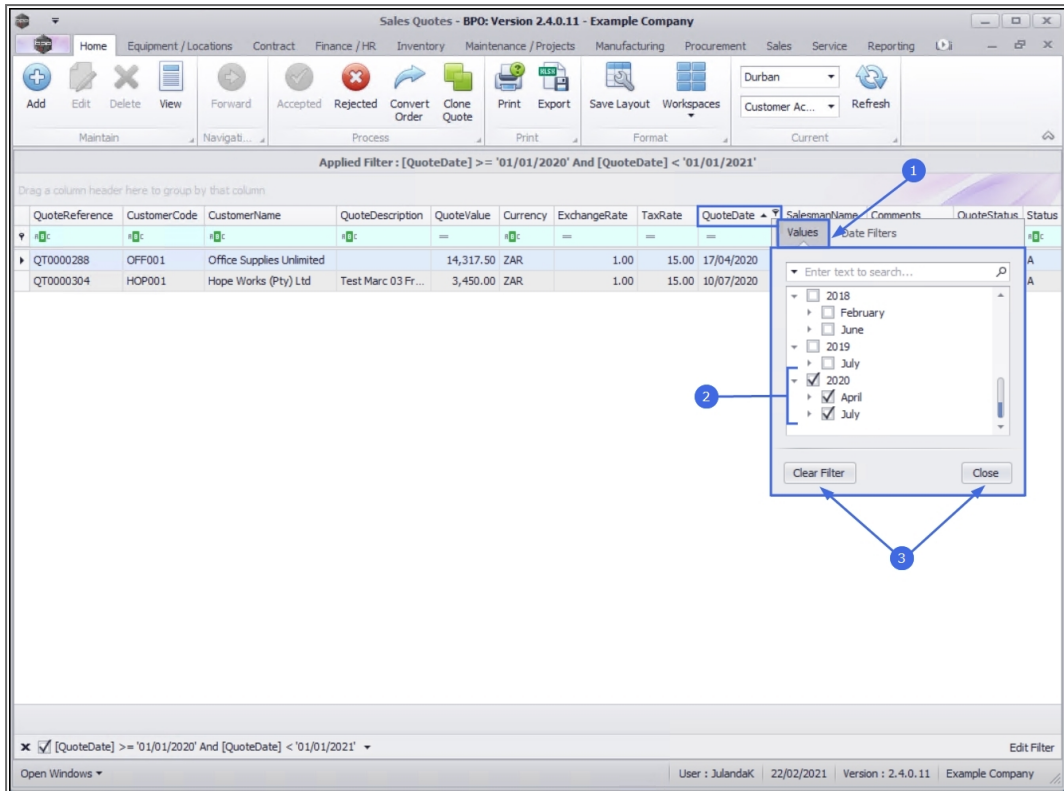
- Click **Clear Filter** to reset the Listing Screen or click **Close** to continue to the Sales Quotes listing screen with the current filter setting.



- Click on the **Values** Tab on the Date Filter screen to display a date summary of the Sales Quotes that have been Accepted by Year and Month.
- Click in the tick box(es) next to the Year and Month(s) you would like to list.
 - The example has the year, **2020**, and the months of **April and July** selected.
- Click on **Clear Filter** to reset the listing screen or **Close** to continue with the current filter setting.



Note that the listing screen has updated with your date selection.



Related Topics

- [Add, Edit, Delete and View Quotes](#)
- [Accept and Reject a Quote](#)
- [Forward Navigation](#)
- [Print and Export a Sales Quote](#)
- [Generate a Sales Order](#)
- [CRM Basics - Quotes](#)
- [Clone a Quote](#)
- [Creating a Quote from a Call](#)
- [Creating a Quote from a Project](#)
- [Link Quote Items to a Work Order](#)
- [Add new Quote in Sales Studio](#)

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