

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

CRM BASICS

QUOTE PRODUCT CONFIGURATION

You need to configure Quote **products** in order to be able to select them as single line items on a Quote.

Product **images** can be linked to the items - which can pull through on customised Quote templates.

Ribbon Access: Webpage > `http://[servername]:[port-no]/BPOCRM/User.aspx`

NAVIGATE TO QUOTE PRODUCTS

1. In the **Dashboard** (Home page),
2. Hover over the **User Name** or **Settings** icon.

CRM Example Company

Abigail Milne

Dashboard

Search

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Phone call	20	3	2
Email	30	3	1
Meeting	20	0	2
On Site inspection	20	1	0
Site inspection	2	0	0

1 Month Performance

Bar chart showing performance for Cases, Invoices, Orders, and Quotes from Nov 2019 to Feb 2020.

4 Month Pipeline

Bar chart showing pipeline values for Nov 2019, Dec 2019, Jan 2020, and Feb 2020.

Today | Recent | Calendar

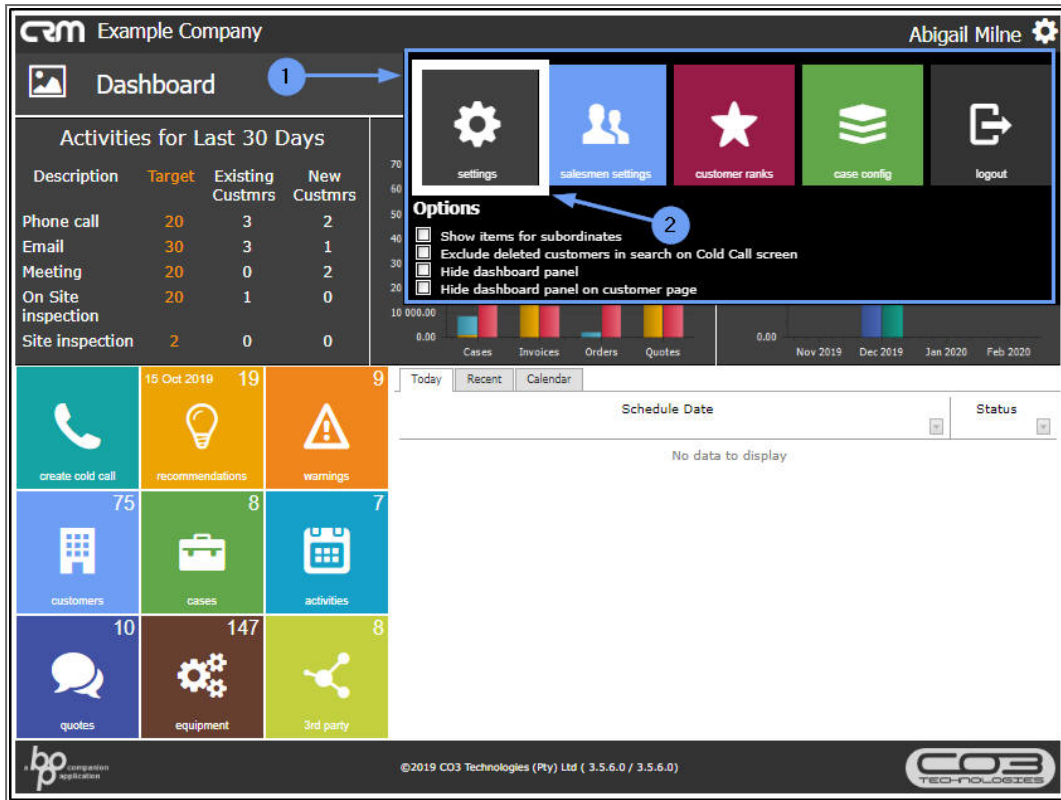
Schedule Date: [] Status: []

No data to display

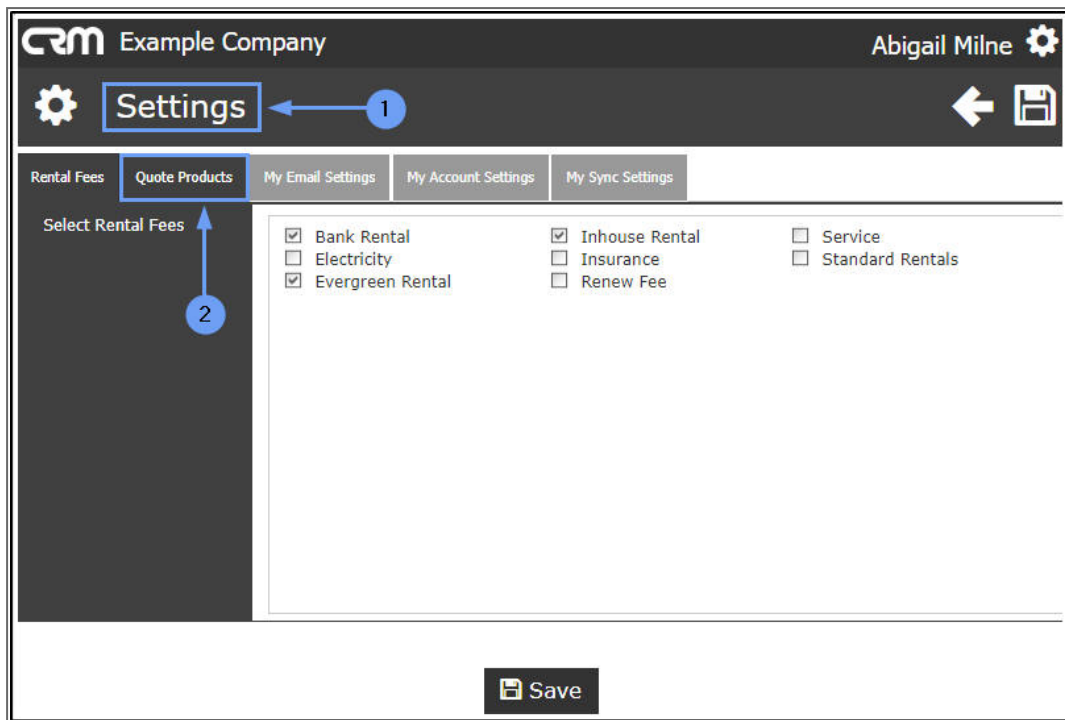
bp comparison

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1. The **Settings Options** frame will be displayed.
2. Click on **Settings**.



1. The **Settings** page will open.
2. Click on the **Quote Products** tab.



QUOTE PRODUCTS LISTING PAGE

1. A full list of **inventory** (part) **definitions** from BPO will be displayed.
2. The **Page Reference** field indicates how many pages of items there are and how many items are listed in total (e.g. Page 1 of 10 (97 items)).
3. The **bold** number indicates which page is currently open. In this example, page **1** (of 10) is open.
4. The **Page size** field indicates how many lines of items are listed on each page (in this example there are currently 10 items listed per page).

The screenshot shows the CRM interface for 'Example Company' with user 'Abigail Milne'. The 'Settings' page is open to the 'Quote Products' tab. A table lists various products with columns for 'Part Image', 'Part Number', 'Part Name', and 'Available for CRM Quotes'. Annotations 1-4 highlight specific UI elements: 1 points to the 'Part Name' column, 2 points to the 'Part Image' column, 3 points to the 'Create Filter' button, and 4 points to the 'Page size' dropdown menu.

Part Image	Part Number	Part Name	Available for CRM Quotes
	SP2020	SP2020 Sprint Colour Multi Functional Copier	<input checked="" type="checkbox"/>
	2020-147K	Black toner SP2020	<input checked="" type="checkbox"/>
	SP1919	SP1919 Sprint Colour MFC	<input checked="" type="checkbox"/>
	SP19-147K	Black Toner SP1919	<input checked="" type="checkbox"/>
	SP19-147C	Cyan Toner - SP1919	<input type="checkbox"/>
	SP19-147Y	Yellow Toner - SP1919	<input checked="" type="checkbox"/>
	SP19-147M	Magenta toner - SP1919	<input checked="" type="checkbox"/>
	2020-147M	Magenta toner SP2020	<input checked="" type="checkbox"/>
	2020-147C	Cyan toner SP2020	<input checked="" type="checkbox"/>
	CL-100-965	Cleaner	<input checked="" type="checkbox"/>

Page 1 of 10 (97 items) [1] 2 3 4 5 6 7 8 9 10 [] Page size: 10

Create Filter Save

SEARCH / FILTER QUOTE PRODUCT ITEM

1. You can use the [Filter Search Row](#), or the
2. [Create Filter](#) functionality to search for a particular item.
3. Click on a **Part Image**.

CRM Example Company Abigail Milne

Settings

Rental Fees Quote Products My Email Settings My Account Settings My Sync Settings

Part Image	Part Number	Part Name	Available for CRM Quotes
	SP2020	SP2020 Sprint Colour Multi Functional Copier	<input checked="" type="checkbox"/>
	2020-147K	Black toner SP2020	<input checked="" type="checkbox"/>
	SP1919	SP1919 Sprint Colour MFC	<input checked="" type="checkbox"/>
	SP19-147K	Black Toner SP1919	<input checked="" type="checkbox"/>
	SP19-147C	Cyan Toner - SP1919	<input type="checkbox"/>
	SP19-147Y	Yellow Toner - SP1919	<input checked="" type="checkbox"/>
	SP19-147M	Magenta toner - SP1919	<input checked="" type="checkbox"/>
	2020-147M	Magenta toner SP2020	<input checked="" type="checkbox"/>
	2020-147C	Cyan toner SP2020	<input checked="" type="checkbox"/>
	CL-100-965	Cleaner	<input checked="" type="checkbox"/>

Page 1 of 10 (97 items) [1] 2 3 4 5 6 7 8 9 10 Page size: 10

Create Filter Save

EDIT / UPDATE QUOTE PRODUCT ITEM

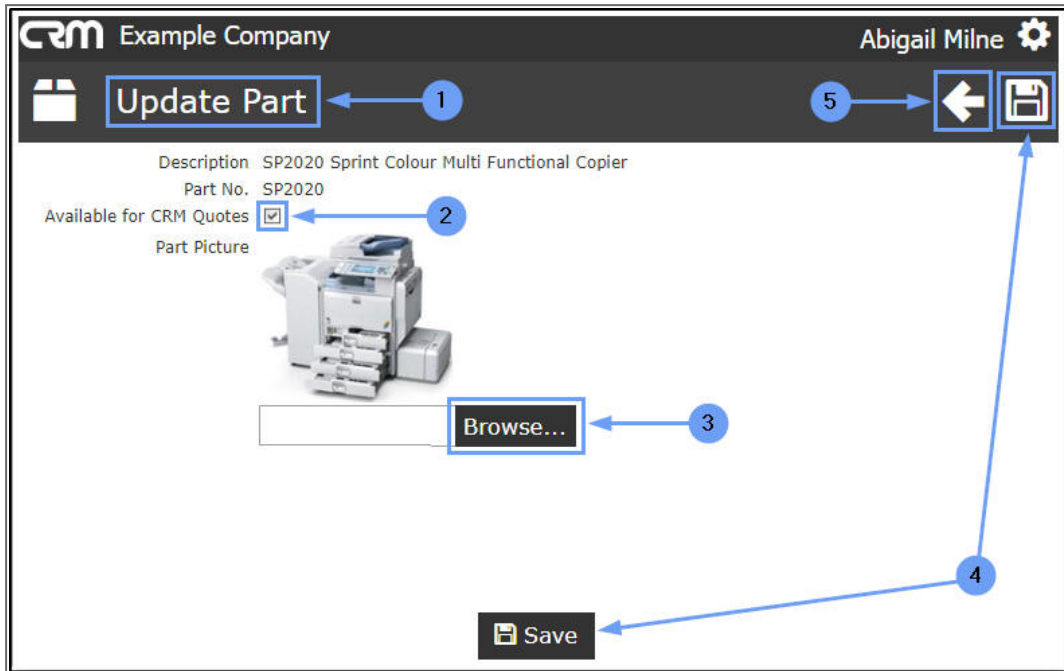
1. The **Update Part** page will open.
2. You can edit the **Available for CRM Quotes** check box.
 - Marking this check box will make this part code available for selection when adding single items to a quote.
3. **Browse** for a product picture, if required.

Either

4. Click on **Save** if you have made any changes and wish to keep them.

Or

5. Click on **Back** to return to the previous page.



MARK PRODUCT ITEM AS AVAILABLE

1. In the **Settings** page,
2. You can also mark whether the item is **Available for CRM Quotes**.
3. This is helpful, if you wish to configure multiple items at a time.

Either

4. Click on **Save** if you have made any changes and wish to keep them.

Or

5. Click on the **Settings** icon or the **CRM** logo to return to the Dashboard (Home page).

The screenshot shows the CRM interface for 'Example Company' with user 'Abigail Milne'. The 'Settings' page is active, specifically the 'Quote Products' tab. A table lists various products with their part numbers and names, and a column for 'Available for CRM Quotes' with checkboxes. A 'Save' button is at the bottom right. Numbered callouts indicate: 1. Settings gear icon, 2. Part Name column, 3. Available for CRM Quotes column, 4. Save button, 5. Part Image column.

Part Image	Part Number	Part Name	Available for CRM Quotes
	SP2020	SP2020 Sprint Colour Multi Functional Copier	<input checked="" type="checkbox"/>
	2020-147K	Black toner SP2020	<input checked="" type="checkbox"/>
	SP1919	SP1919 Sprint Colour MFC	<input checked="" type="checkbox"/>
	SP19-147K	Black Toner SP1919	<input checked="" type="checkbox"/>
	SP19-147C	Cyan Toner - SP1919	<input type="checkbox"/>
	SP19-147Y	Yellow Toner - SP1919	<input checked="" type="checkbox"/>
	SP19-147M	Magenta toner - SP1919	<input checked="" type="checkbox"/>
	2020-147M	Magenta toner SP2020	<input checked="" type="checkbox"/>
	2020-147C	Cyan toner SP2020	<input checked="" type="checkbox"/>
	CL-100-965	Cleaner	<input checked="" type="checkbox"/>

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