

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

CRM BASICS

ADDING / EDITING / DELETING QUOTES

Adding Quotes in CRM, will also create the **quote in BPO** as a **New Quote**.

This new quote will need to be **emailed to the client**. This email include links to either:

- **Accept** or
- **Reject** the Quote

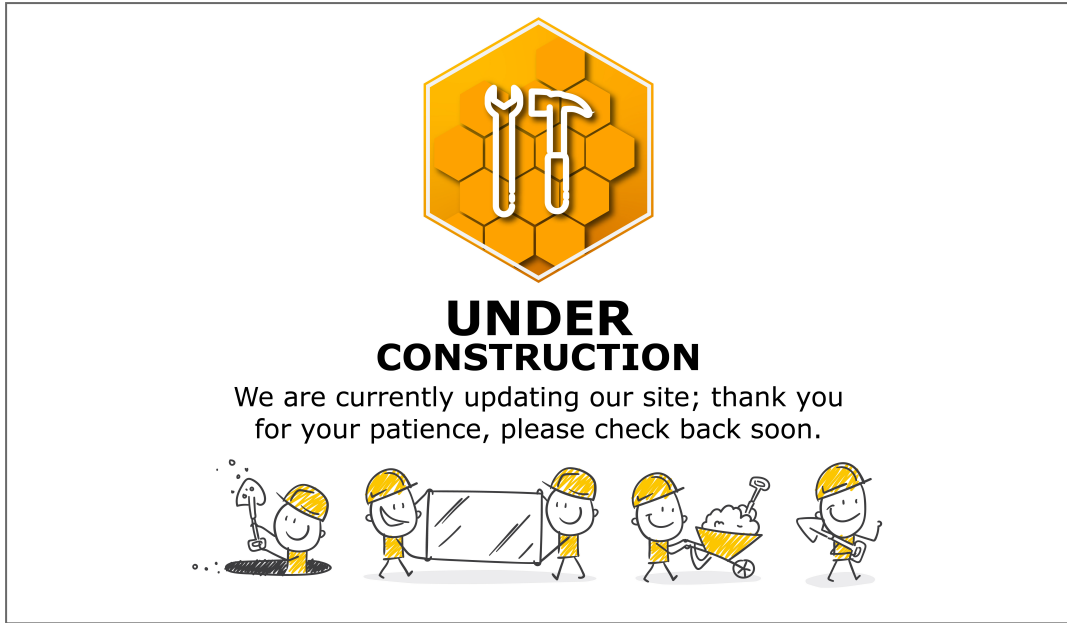
or to have the salesman:

- **Contact Me**

regarding the Quote.

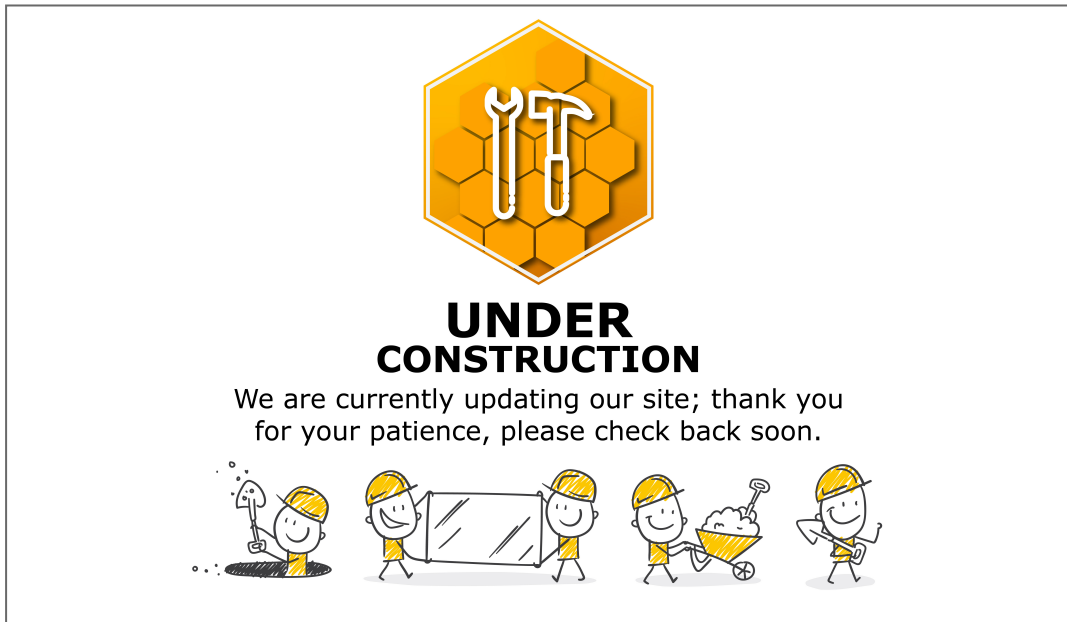
Once Accepted (or Rejected), a quote can no longer be edited.

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Quotes can be added when: **creating a new case or editing a case** , **adding or editing an activity**, or from the **Customer-specific Cases** listing page and the **Customer-specific Activities** listing page.

ADD A NEW QUOTE WHEN CREATING A CASE...??



ADD A NEW QUOTE WHEN EDITING A CASE

1. In the Dashboard,
2. Click on the Cases tile.

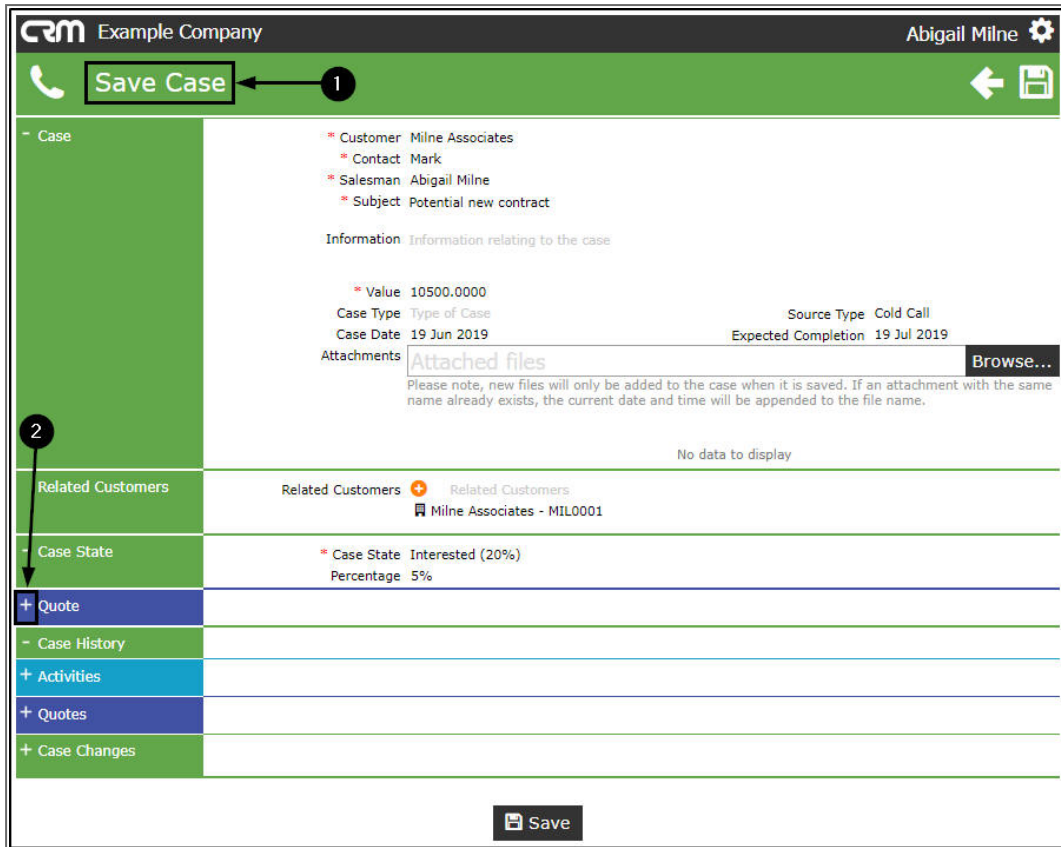


1. The **My Cases** page will open.
2. Hover over a selected case to reveal the **Action buttons**.
3. Click on either the **View Case Info and History** button or the **View/Edit this Case** button.
 - (Either of these buttons will direct you to the Save Case page where you can add a new quote.)

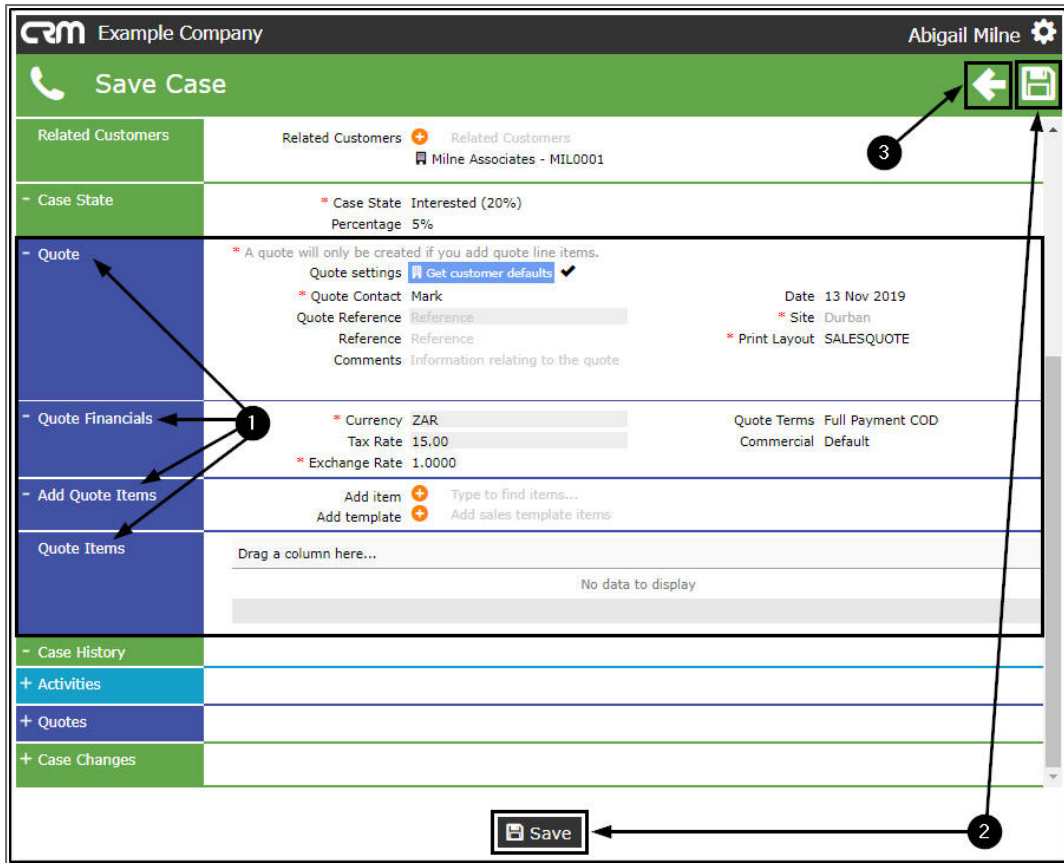
The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The 'My Cases' tab is highlighted with callout 1. Below the header is a table with columns: Subject, Contact Name, Customer Name, Case State Description, and Is Pipeline Case. The first row is expanded, showing details for 'Potential new contract' with callout 2 pointing to the expanded area. Callout 3 points to the action icons in the top right of the expanded row. The table lists several cases with their respective customer names and pipeline statuses.

Subject	Contact Name	Customer Name	Case State Description	Is Pipeline Case
Potential new contract	Mark , Milne Associates		Interested	No
Potential New Deal	Jemma Jones , Liberty Jones			No
	Paul Young , Young Designs			No
Possible New Deal Rental - 3 machines	Jason King , King Copiers			No
New product range	John West , Hope Works			No
Mr Lovely from Lovely Test Customer, which is a Platinum customer, has a rank call due today, 15 Oct 2019.	Mr Lovely , Lovely Test Customer			No
Client upgrading machines	Josh Meyers , Bits and Bytes			No
Potential sale of 5 machines.	Stewart Hope , Hope Works			Yes

1. The **Save Case** page will open.
2. Expand the **Quote** frame.

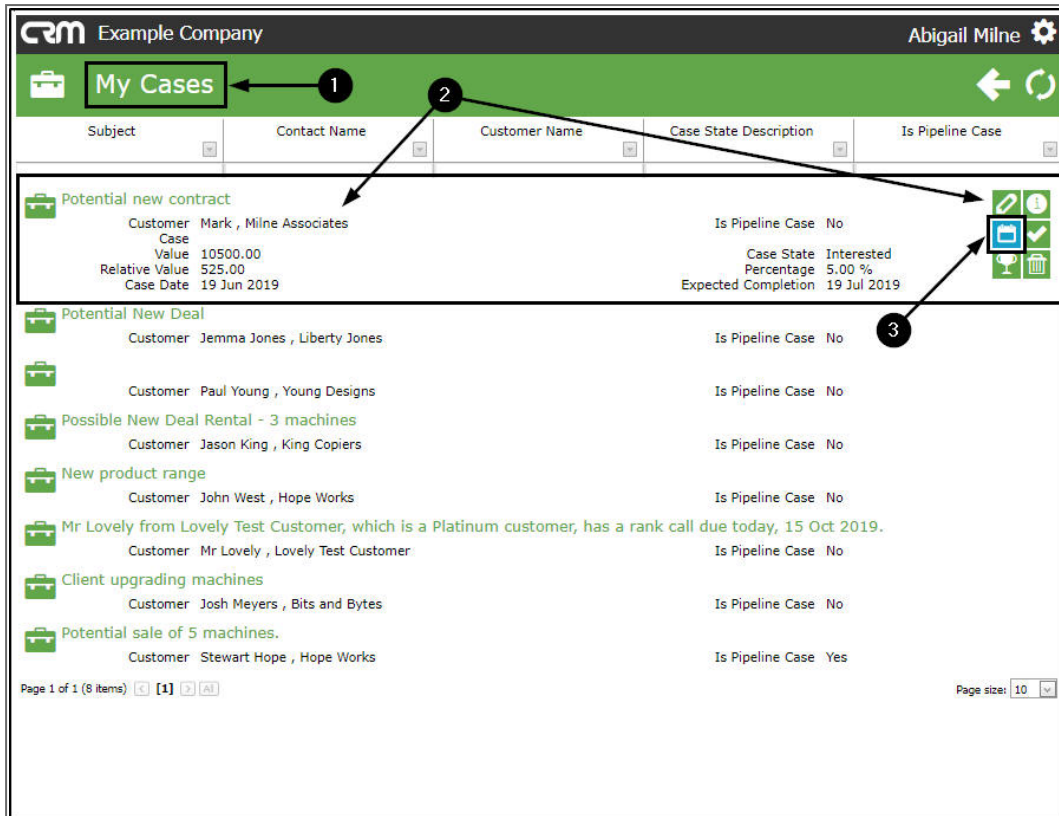


1. The Quote, **Quote Financials**, **Add Quote Items** and **Quote Items** frames will be expanded.
 - Ensure that you have filled in any mandatory fields [*] and then follow the **Link Quote Process** to create the new quote.
2. Either click on **Save** to keep the changes or
3. Click on **Back** to return to the My Cases Screen.

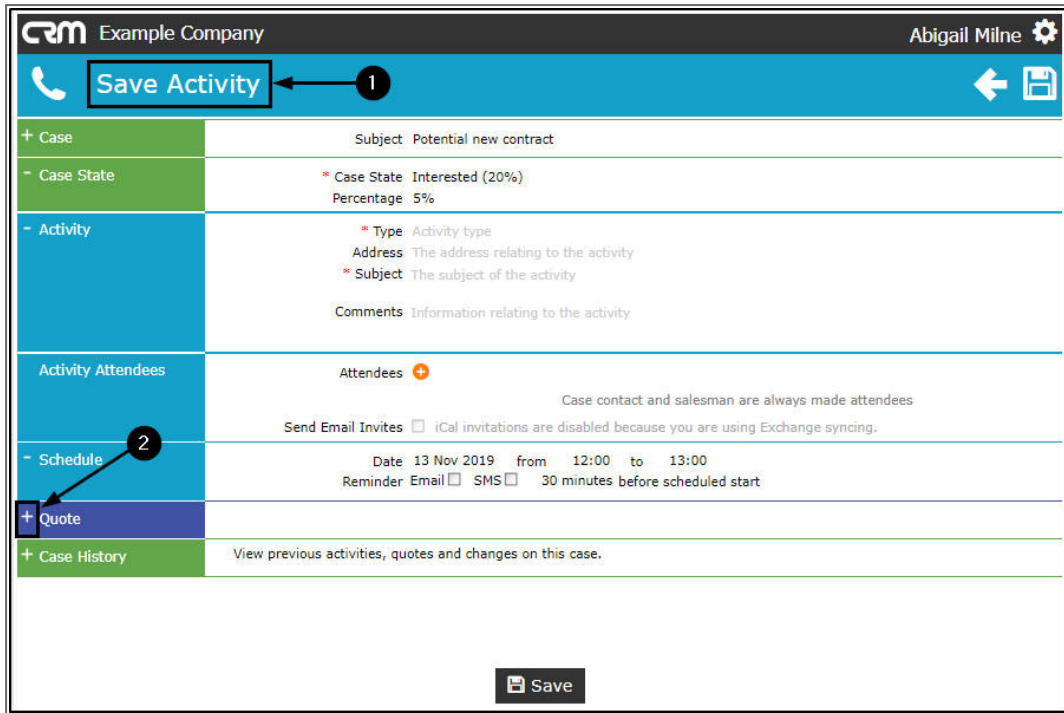


LINK A QUOTE TO AN ACTIVITY IN A CASE

1. In the **My Cases** page,
2. Hover over a selected case to reveal the **Action buttons**.
3. Click on the **New Activity** button.



1. The **Save Activity** page will open.
2. Expand the **Quote** frame.

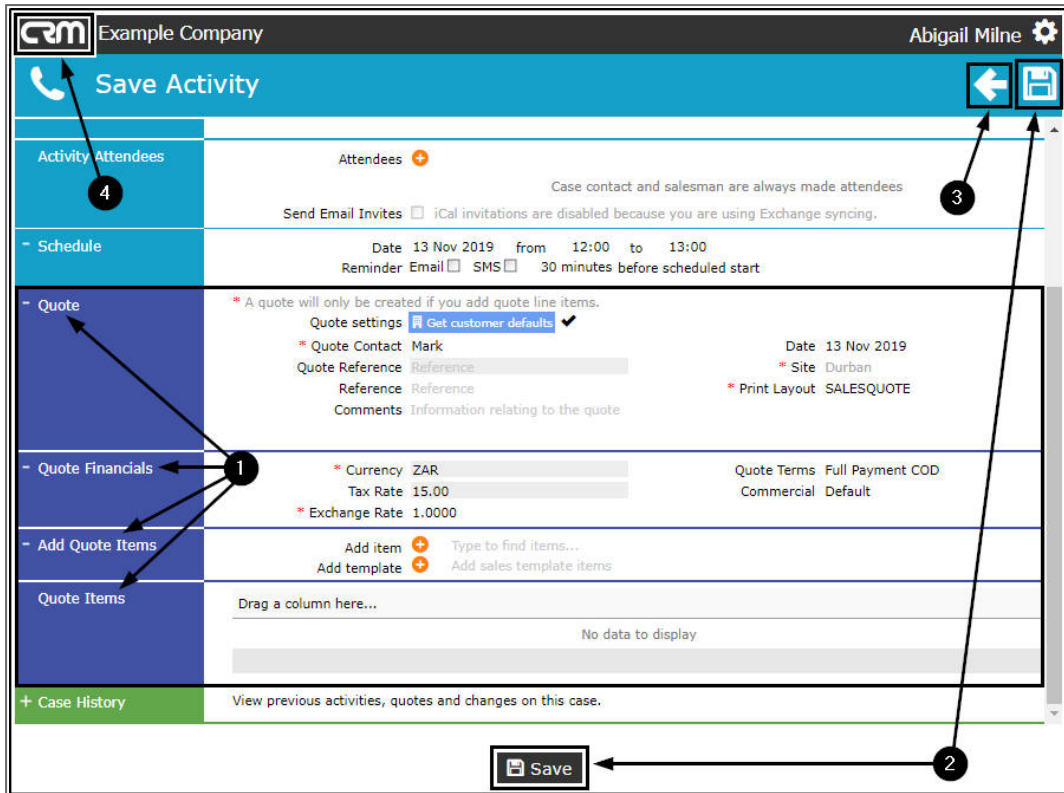


The screenshot shows a CRM interface for 'Example Company' with the user 'Abigail Milne'. The form is titled 'Save Activity' and contains the following sections:

- Case:** Subject: Potential new contract
- Case State:** Case State: Interested (20%), Percentage: 5%
- Activity:** Type: Activity type, Address: The address relating to the activity, Subject: The subject of the activity, Comments: Information relating to the activity
- Activity Attendees:** Attendees: +, Case contact and salesman are always made attendees, Send Email Invites: iCal invitations are disabled because you are using Exchange syncing.
- Schedule:** Date: 13 Nov 2019, from: 12:00 to 13:00, Reminder: Email SMS 30 minutes before scheduled start
- Quote:** + (highlighted with a blue box and a '2' in a circle)
- Case History:** View previous activities, quotes and changes on this case.

A 'Save' button is located at the bottom center of the form.

1. The Quote, **Quote Financials**, **Add Quote Items** and **Quote Items** frames will be expanded.
 - Ensure that you have filled in any mandatory fields [*] and then follow the **Link Quote Process** to create the new quote.
2. Either click on **Save** to keep the changes or
3. Click on **Back** to return to the My Cases Screen.
4. For the purpose of this manual, click on the **CRM** logo to return to the Dashboard (Home page).

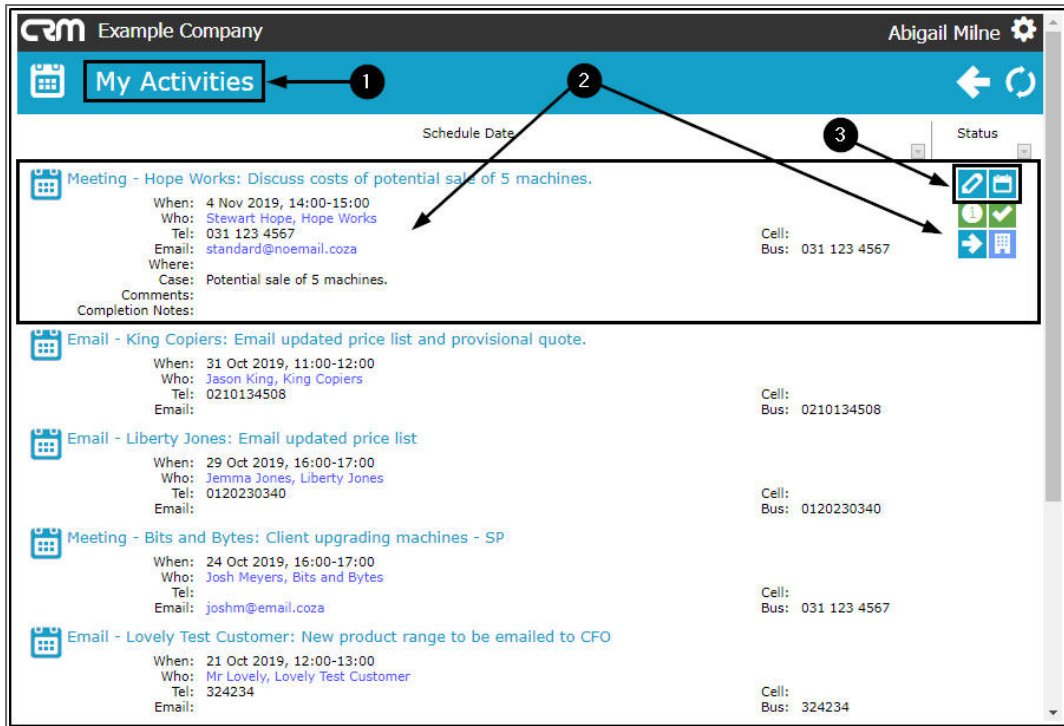


LINK A QUOTE WHEN EDITING AN ACTIVITY

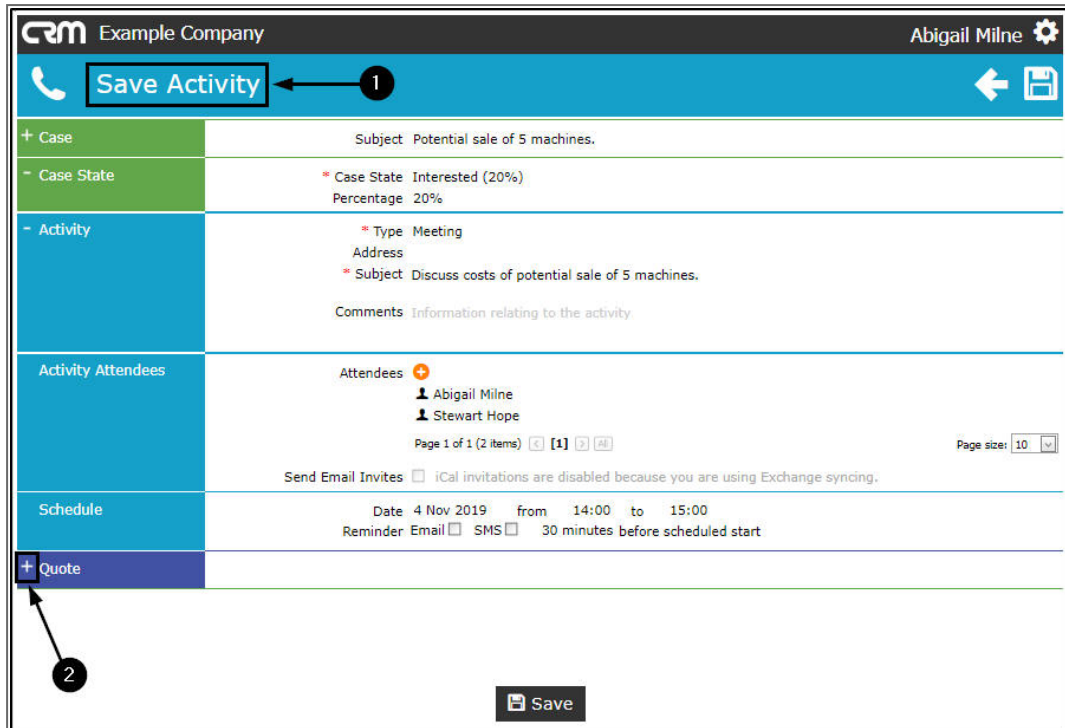
1. In the **Dashboard**,
2. Click on the **Activities** tile.



1. The **My Activities** page will open.
2. Hover over a selected Activity to reveal the **Action buttons**.
3. Click on either the **View/Edit this Activity** button or the **Reschedule this Activity** button.
 - (Either of these buttons will direct you to the Save Activity page where you can add a new quote.)



1. The **Save Activity page** will open.
2. Expand the **Quote** frame.

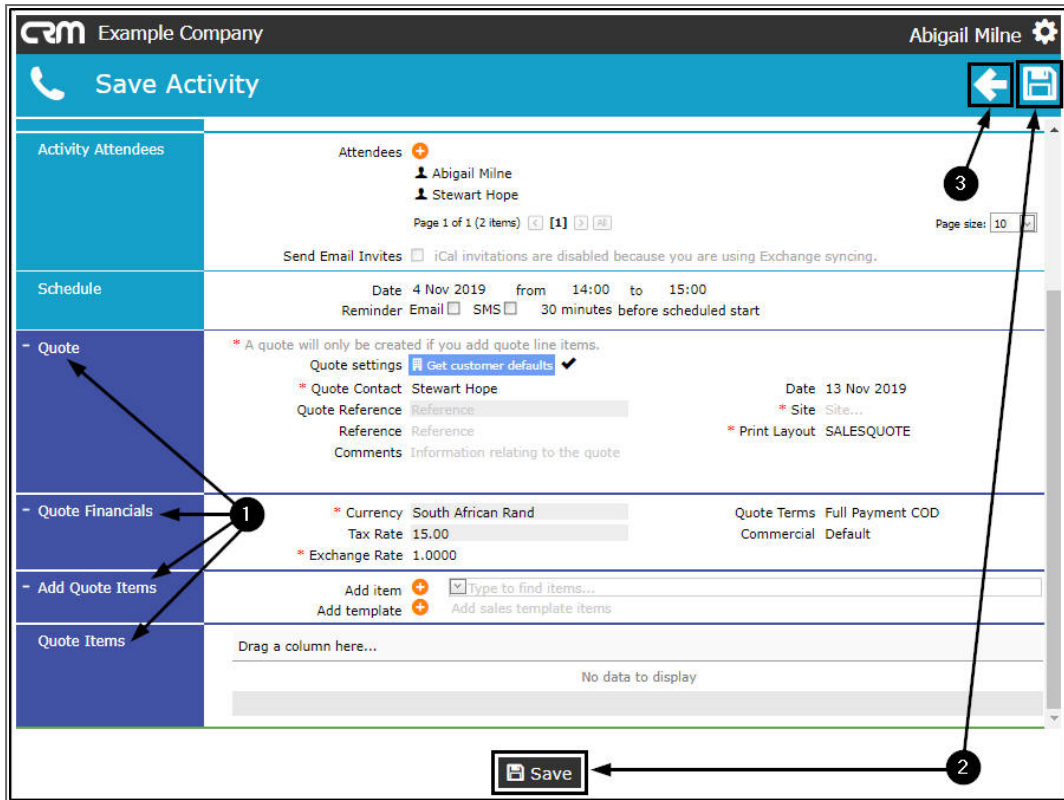


The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The form is titled 'Save Activity' and contains the following sections:

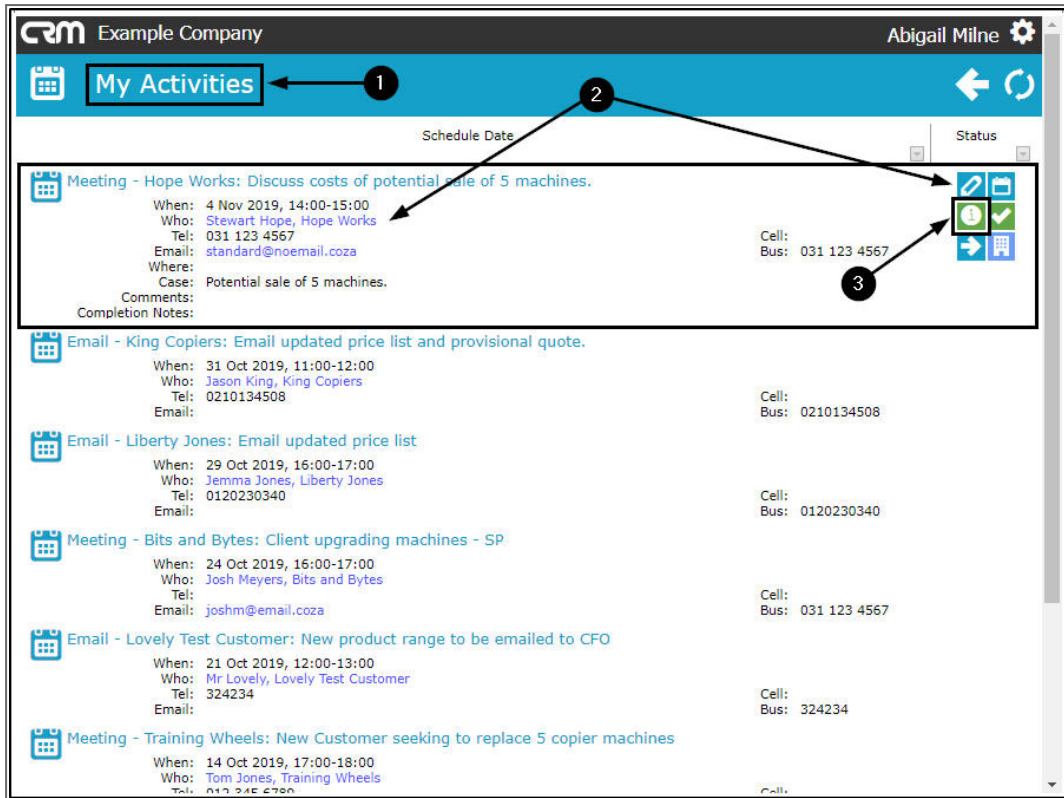
- Case:** Subject: Potential sale of 5 machines.
- Case State:** * Case State: Interested (20%), Percentage: 20%
- Activity:** * Type: Meeting, Address, * Subject: Discuss costs of potential sale of 5 machines. Comments: Information relating to the activity.
- Activity Attendees:** Attendees: Abigail Milne, Stewart Hope. Page 1 of 1 (2 items). Page size: 10.
- Schedule:** Date: 4 Nov 2019, from 14:00 to 15:00. Reminder: Email, SMS, 30 minutes before scheduled start.

Annotations in the image include a circled '1' pointing to the 'Save Activity' button and a circled '2' pointing to the '+ Quote' button. A 'Save' button is located at the bottom right of the form.

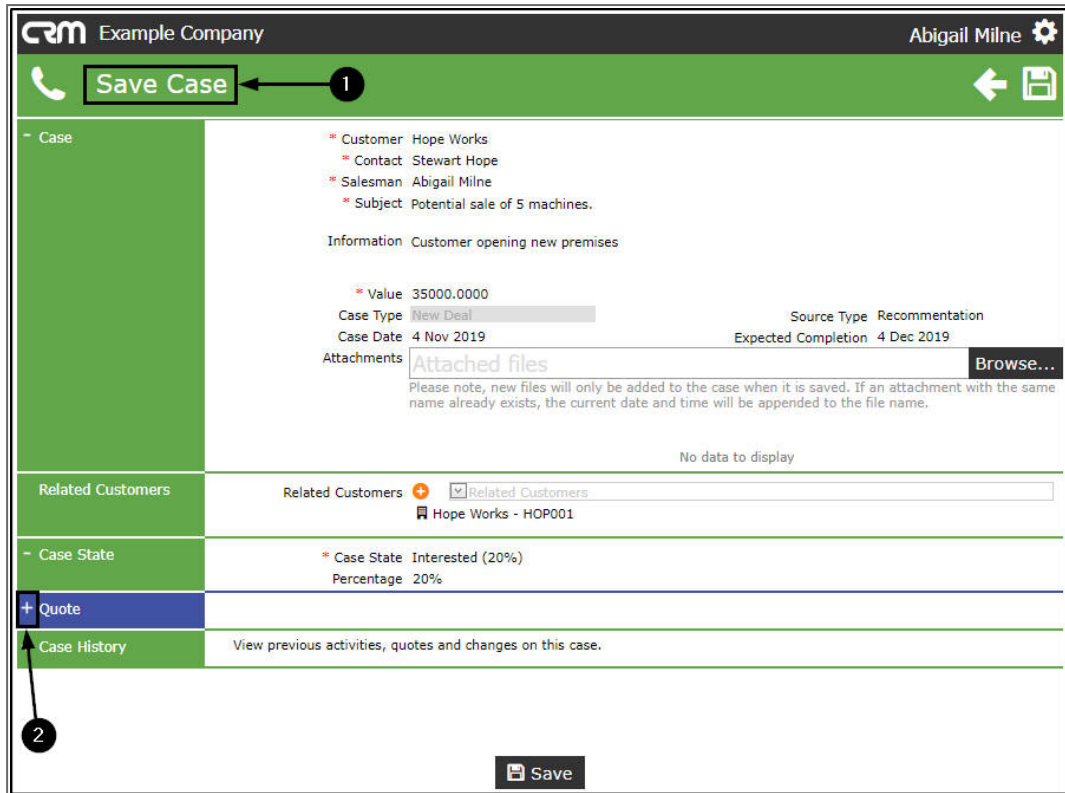
1. The Quote, **Quote Financials**, **Add Quote Items** and **Quote Items** frames will be expanded.
 - Ensure that you have filled in any mandatory fields [*] and then follow the **Link Quote Process** to create the new quote.
2. Either click on **Save** to keep the changes or
3. Click on **Back** to return to the My Activities Screen.



1. In the **My Activities** page,
2. Hover over a selected Activity to reveal the **Action buttons**.
3. Click on the **View Case Info and History** button.



1. The **Save Case** page will open.
2. Expand the **Quote** frame.



1. The Quote, **Quote Financials**, **Add Quote Items** and **Quote Items** frames will be expanded.
 - Ensure that you have filled in any mandatory fields [*] and then follow the **Link Quote Process** to create the new quote.
2. Either click on **Save** to keep the changes or
3. Click on **Back** to return to the My Cases Screen.
4. For the purpose of this manual, click on the **CRM** logo to return to the Dashboard (Home page).

The screenshot shows the 'Save Case' interface in a CRM system. The header includes the CRM logo, 'Example Company', and the user name 'Abigail Milne'. The main content area is divided into several sections:

- Save Case:** A green header bar with a back arrow and a save icon (annotated with 3).
- Related Customers:** A section showing 'Related Customers' with a sub-section for 'Hope Works - HOP001' (annotated with 4).
- Case State:** A section showing 'Case State Interested (20%)' and 'Percentage 20%'.
- Quote:** A section with a blue background containing details for a quote, including 'Quote Contact: Stewart Hope', 'Date: 13 Nov 2019', and 'Quote Reference: Reference' (annotated with 1).
- Quote Financials:** A section showing 'Currency: South African Rand', 'Tax Rate: 15.00', and 'Exchange Rate: 1.0000' (annotated with 2).
- Quote Items:** A section with a blue background and a table header 'Quote Items' (annotated with 3).
- Case History:** A section at the bottom for viewing previous activities.

A 'Save' button is located at the bottom center of the interface (annotated with 4).

LINK A QUOTE FROM CUSTOMER DASHBOARD WHEN EDITING A CASE

The screenshot shows a web browser window with the title 'Save Quote'. The address bar contains the URL: localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info. The browser's navigation bar includes icons for home, back, and forward. The application header features a 'Save Quote' title and a save icon.

The main content area is divided into several sections:

- + Case**: Subject: New machine - test case
- Quote**:
 - * A quote will only be created if you add quote line items.
 - * Customer: Hope Works
 - * Quote Contact: Jane Alrich
 - Quote Reference: Reference
 - Reference: OR589
 - Comments: Information relating to the quote
 - Date: 18 Apr 2016
 - * Print Layout: SALESQUOTE
- + Quote Financials**: (Empty section)
- Quote Items**:
 - Add item: Add single item (+)
 - Add template: Add sales template items (+)
 - Drag a column here...
 - No data to display

A 'Save' button is located at the bottom center of the page.

- Search for, and select the Quote Contact.
- Type in a reference, e.g. a customer order number.
- Type in comments related to the quote.

Save Quote

localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info

Save Quote

+ Case

Subject New machine - test case

- Quote

* A quote will only be created if you add quote line items.

* Customer Hope Works

* Quote Contact Jane Alrich Date 18 Apr 2016

Quote Reference Reference * Print Layout SALESQUOTE

Reference OR589

Comments Information relating to the quote

+ Quote Financials

- Quote Items

Add item Add single item +

Add template Add sales template items +

Drag a column here...

No data to display

Save

- Search for, and select the Quote Contact.
- Type in a reference, e.g. a customer order number.
- Type in comments related to the quote.

Save Quote

localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info

Save Quote

+ Case

Subject New machine - test case

- Quote

* A quote will only be created if you add quote line items.

* Customer Hope Works

* Quote Contact Jane Alrich Date 18 Apr 2016

Quote Reference Reference * Print Layout SALESQUOTE

Reference OR589

Comments Information relating to the quote

+ Quote Financials

- Quote Items

Add item Add single item +

Add template Add sales template items +

Drag a column here...

No data to display

Save

- Search for, and select the Quote Contact.
- Type in a reference, e.g. a customer order number.
- Type in comments related to the quote.

The screenshot shows a web browser window with the title 'Save Quote'. The address bar contains the URL: localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info. The browser's navigation bar includes icons for home, back, and forward. The application header features a 'Save Quote' title and a save icon.

The main content area is divided into several sections:

- + Case**: Subject: New machine - test case
- Quote**:
 - * A quote will only be created if you add quote line items.
 - * Customer: Hope Works
 - * Quote Contact: Jane Alrich
 - Quote Reference: Reference
 - Reference: OR589
 - Comments: Information relating to the quote
 - Date: 18 Apr 2016
 - * Print Layout: SALESQUOTE
- + Quote Financials**: (Empty section)
- Quote Items**:
 - Add item: Add single item (+)
 - Add template: Add sales template items (+)
 - Drag a column here...
 - No data to display

At the bottom center of the page, there is a black button with a white document icon and the text 'Save'.

- Expand the 'Quote Financials' section to view the customer's currency, tax rate and exchange rate.
- This section also includes the ' *Quote Terms* ' - this is the quote repayment factor and should be configured in Static Rights ([Sales Quote Repayment Method](#)).
- Select the terms as required for this quote.

Save Quote
- □ X

← → ↻
localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info...

🗨️ 🏠 📱 ↶
📄

Save Quote

+ Case	Subject New machine - test case
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- Quote	<p><small>* A quote will only be created if you add quote line items.</small></p> <p>* Customer Hope Works</p> <p>* Quote Contact Jane Alrich Date 18 Apr 2016</p> <p>Quote Reference <input type="text" value="Reference"/> * Print Layout SALESQUOTE</p> <p>Reference OR589</p> <p>Comments <i>Information relating to the quote</i></p>
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- Quote Financials	<p>* Currency <input type="text" value="South African Rand"/></p> <p>Tax Rate <input type="text" value="14.00"/></p> <p>* Exchange Rate <input type="text" value="1.0000"/></p>	<p>Quote Terms <input type="text" value="Full Payment COD"/> x</p> <table border="1" style="font-size: small; border-collapse: collapse;"> <thead> <tr> <th>Commercial</th> <th>Payments</th> <th>Payment Period</th> </tr> </thead> <tbody> <tr> <td></td> <td>1</td> <td>Full Payment COD</td> </tr> <tr> <td></td> <td>12</td> <td>12 Months</td> </tr> <tr> <td></td> <td>6</td> <td>6 Months</td> </tr> </tbody> </table>	Commercial	Payments	Payment Period		1	Full Payment COD		12	12 Months		6	6 Months
Commercial	Payments	Payment Period												
	1	Full Payment COD												
	12	12 Months												
	6	6 Months												

- Quote Items	<p style="text-align: center;">Add item <input type="text" value="Add single item"/> +</p> <p style="text-align: center;">Add template <input type="text" value="Add sales template items"/> +</p> <hr/> <p style="text-align: center; color: #ccc;">Drag a column here...</p> <hr/> <p style="text-align: center; color: #ccc;">No data to display</p>
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📄 Save

- You now have the ability to **add single items** to a quote (with or without also using quote templates).
- **Note:** For Part Numbers to pull through to this list - you need to ensure that the [Quote Products are specified](#).

Save Quote

localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info...

Save Quote

+ Case Subject **New machine - test case**

- Quote

* A quote will only be created if you add quote line items.

*** Customer** Hope Works

*** Quote Contact** Jane Alrich **Date** 18 Apr 2016

Quote Reference *** Print Layout** SALESQUOTE

Reference OR589

Comments Information relating to the quote

+ Quote Financials

- Quote Items

+

Add template

Type	Code	Description	#
INN	SP2020	SP2020 Sprint Colour M	1
INN	2020-147K	Black toner SP2020	2
INN	SP19-147Y	Yellow Toner - SP1919	6
INN	SP19-147M	Magenta toner - SP1915	7
INN	2020-147M	Magenta toner SP2020	8
INN	2020-147C	Cyan toner SP2020	9
INN	CL-100-965	Cleaner	11

Drag a column here...

Save

- Type in the text field to filter on the Code and Description lines.
- Click on the item you want to add

Save Quote

Subject: New machine - test case

Quote

- * A quote will only be created if you add quote line items.
- * Customer: Hope Works
- * Quote Contact: Jane Alrich
- Date: 18 Apr 2016
- Quote Reference: * Print Layout: SALESQUOTE
- Reference: OR589
- Comments: Information relating to the quote

Quote Items

Add item:

Type	Code	Description	#
INVN	SP2020	SP2020 Sprint Colour M...	1
INVN	2020-147K	Black toner SP2020	2
INVN	2020-147M	Magenta toner SP2020	8
INVN	2020-147C	Cyan toner SP2020	9
INVN	2020-147L	SP2020 Clear Toner	24
INVN	2020-147Y	Yellow toner SP2020	10
INVN	20-753	SP2020 Fuser Unit	64

Save

- Click on the 'Add Item' button

Save Quote

localhost:50000/bpocm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info...

Save Quote

+ Case Subject New machine - test case

- Quote

- * A quote will only be created if you add quote line items.
- * Customer Hope Works
- * Quote Contact Jane Alrich Date 18 Apr 2016
- Quote Reference Reference * Print Layout SALESQUOTE
- Reference OR589
- Comments Information relating to the quote

+ Quote Financials

- Quote Items

Add item INVN | SP2020 | SP2020 x +

Add template Add sales template items +

Drag a column here...

No data to display

Save

- The item will be added to the Quote Line Items sections

Save Quote

Subject: New machine - test case

* A quote will only be created if you add quote line items.

- * Customer: Hope Works
- * Quote Contact: Jane Alrich
- Quote Reference:
- Reference: OR589
- Comments: Information relating to the quote

Date: 18 Apr 2016

* Print Layout: SALESQUOTE

Quote Items

Add item: [INVN | SP2020 | SP2020 Sp](#) +

Add template: [Add sales template items](#) +

Actions	Item Type	Item Code	Quantity	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
	INVN	SP2020	1	12250.00	9500.00		9500.00	10830.00
				12250.00	9500.00	0.00	9500.00	10830.00

Save

- To add Sales Templates: click on the 'Add Quote Template Items' dropdown
- You could also type into the text box to filter for the template you need
- Click on the template required.
- Link the templates items by clicking on the 'Add Items' button

Save Quote
- □ X

localhost:5000/bpocrm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info

Save Quote
📄

+ Case

Subject New machine - test case

- Quote

* A quote will only be created if you add quote line items.

Customer Hope Works

Quote Contact Jane Alrich Date 18 Apr 2016

Quote Reference * Print Layout SALESQUOTE

Reference OR589

Comments Information relating to the quote

+ Quote Financials

- Quote Items

Add Item
INVN | SP2020 | SP2020 Sp

Add template
📄






Actions	Item Type	Item Name	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
🗑️	INVN	SP1020 Standard Package	12250.00	9500.00		9500.00	10830.00
			12250.00	9500.00	0.00	9500.00	10830.00

📄 Save

- You can *edit a line* item, by clicking on the 'Edit' button on that line.

The screenshot shows a web browser window titled 'Save Quote' with the following details:

- Case:** Subject New machine - test case
- Quote:**
 - Customer: Hope Works
 - Quote Contact: Jane Alrich
 - Date: 18 Apr 2016
 - Quote Reference: Reference
 - Reference: OR589
 - Comments: Information relating to the quote
 - Print Layout: SALESQUOTE
- Quote Items:**
 - Add item: INVN | SP2020 | SP2020 Sp
 - Add template: SP1020 Standard Package

Actions	Item Type	Item Code	Quantity	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
	INVN	SP2020	1	12250.00	9500.00		9500.00	10830.
	INVN	SP1020	1	7500.00	8625.00	8625.00	8625.00	9832.
	INVN	1020-478	1	0.00	0.00	0.00	0.00	0.
	INVN	1020-147K	1	350.00	402.50	402.50	402.50	458.
	INVN	1020-147C	1	0.00	0.00	0.00	0.00	0.

A 'Save' button is located at the bottom center of the interface.

- The quote item edit section will come up.
- Make the changes required.
- Click on 'Update' to view the changes in the quote.
- Click on 'Done' when you have completed all the changes.

Case
Subject: New machine - test case

Quote
 * A quote will only be created if you add quote line items.
 * Customer: Hope Works
 * Quote Contact: Jane Alrich
 Date: 18 Apr 2016
 Quote Reference: Reference
 * Print Layout: SALESQUOTE
 Reference: OR589
 Comments: Information relating to the quote

Quote Financials

Quote Items
 Add Item: INVN | SP2020 | SP2020 Sp
 Add template: SP1020 Standard Package

Actions	Item Type	Item Code	Quantity	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
	INVN	SP2020	1	12250.00	9500.00		9500.00	10830.00

Quote Item Description: SP2020 Sprint Quantity: 1 Unit Cost: 12250.000000 Item Price: 9500.00
[Update Done](#)

Save

- Click on the 'delete' button to remove line items from the quote.

Save Quote
X +

localhost:50000/bpocrm/MaintainQuote.aspx?CaseID=5&case_info=1&case_info_state=2&case_info

Save Quote
📄

Case

Subject New machine - test case

Quote

* A quote will only be created if you add quote line items.

* Customer Hope Works

* Quote Contact Jane Alrich Date 18 Apr 2016

Quote Reference * Print Layout SALESQUOTE

Reference OR589

Comments Information relating to the quote

Quote Financials

Quote Items

Add item INVN | SP2020 | SP2020 Sp +

Add template SP1020 Standard Package +

Actions	Item Type	Item Code	Quantity	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
	INVN	SP2020	1	12250.00	9500.00		9500.00	10830.00
	INVN	SP1020	1	7500.00	8625.00	8625.00	8625.00	9832.50
	INVN	1020-478	1	0.00	0.00	0.00	0.00	0.00
	INVN	1020-147K	1	350.00	402.50	402.50	402.50	458.85
	INVN	1020-147C	1	0.00	0.00	0.00	0.00	0.00

Save

- *Note: A new Quote Terms method can be selected, which will reapply the 'Repayment Amount per Period'*

Case
Subject: New machine - test case

Quote
 * A quote will only be created if you add quote line items.
 * Customer: Hope Works
 * Quote Contact: Jane Alrich
 Date: 18 Apr 2016
 Quote Reference: Reference
 * Print Layout: SALESQUOTE
 Reference: OR589
 Comments: Information relating to the quote

Quote Financials
 * Currency: South African Rand
 Quote Terms: 12 Months
 Tax Rate: 14.00
 Commercial: Default
 * Exchange Rate: 1.0000

Quote Items
 Add Item: INVN | SP2020 | SP2020 Sp
 Add template: SP1020 Standard Package

Actions	Item Type	Item Code	Quantity	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
	INVN	SP2020	1	12250.00	9500.00	1235.00	9500.00	10830.00
	INVN	SP1020	1	7500.00	8625.00	1121.25	8625.00	9832.50
	INVN	1020-478	1	0.00	0.00	0.00	0.00	0.00
	INVN	1020-147K	1	350.00	402.50	52.33	402.50	458.85

Save

- Make sure you 'Save' once you are done.

Save Quote

Case Subject New machine - test case

Quote

- * A quote will only be created if you add quote line items.
- * Customer Hope Works
- * Quote Contact Jane Alrich Date 18 Apr 2016
- Quote Reference Reference * Print Layout SALESQUOTE
- Reference OR589
- Comments Information relating to the quote

Quote Financials

- * Currency South African Rand Quote Terms 12 Months
- Tax Rate 14.00 Commercial Default
- * Exchange Rate 1.0000

Quote Items

Add item INVN | SP2020 | SP2020 Sp +

Add template SP1020 Standard Package +

Actions	Item Type	Item Code	Quantity	Unit Cost	Item Price	Payment per Period	Total	Total Inclusive
	INVN	SP2020	1	12250.00	9500.00	1235.00	9500.00	10830.00
	INVN	SP1020	1	7500.00	8625.00	1121.25	8625.00	9832.50
	INVN	1020-478	1	0.00	0.00	0.00	0.00	0.00
	INVN	1020-147K	1	350.00	402.50	52.33	402.50	458.85

Save

See Also:

- [View / Print / Email the Quote](#)

CRM.015.001