

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

## CRM BASICS

### CLONE A QUOTE

- Added feature to create a copy of a quote for the same or a different customer. All quote details are copied and all line items from the original quote are included and can be edited or removed and new items can also be added.
  - If the currency of the clone is the same the user is asked whether they want to keep the same prices or update the quote with latest prices.
  - If the currency is different the prices will be automatically updated.
  - Quote copies can be linked to an existing Case.
- A full list of Quotes can be accessed from the **Home Page** , or client specific Quotes from the **Customer Page**.

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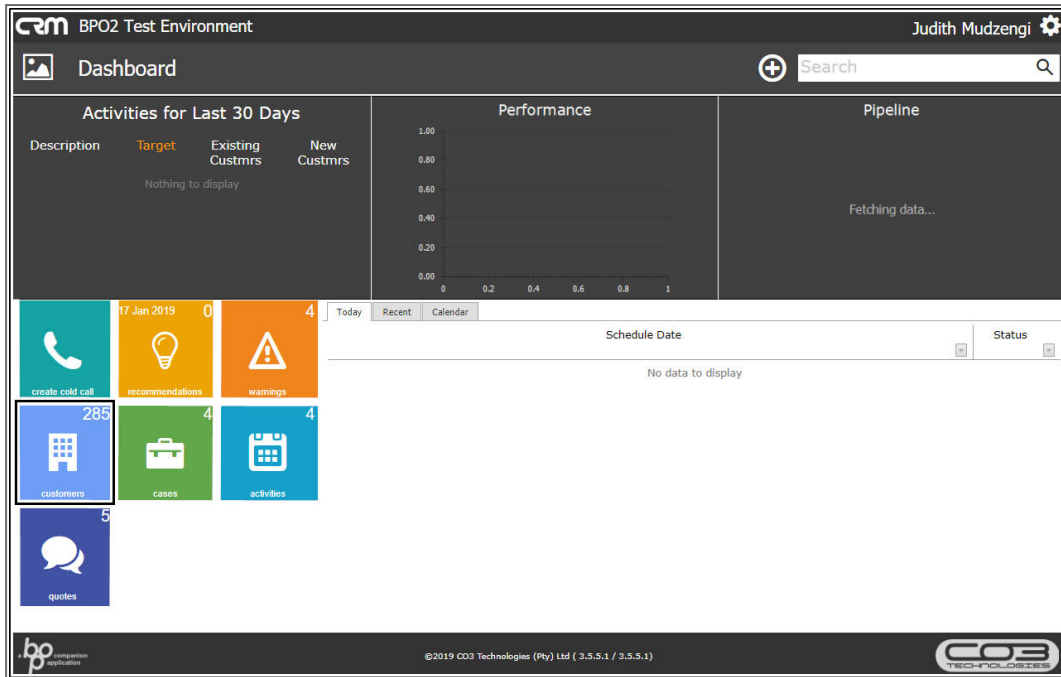
**Ribbon Access:** Webpage > [http://\[servername\]:\[port-no\]/BPOCRM/User.aspx](http://[servername]:[port-no]/BPOCRM/User.aspx)

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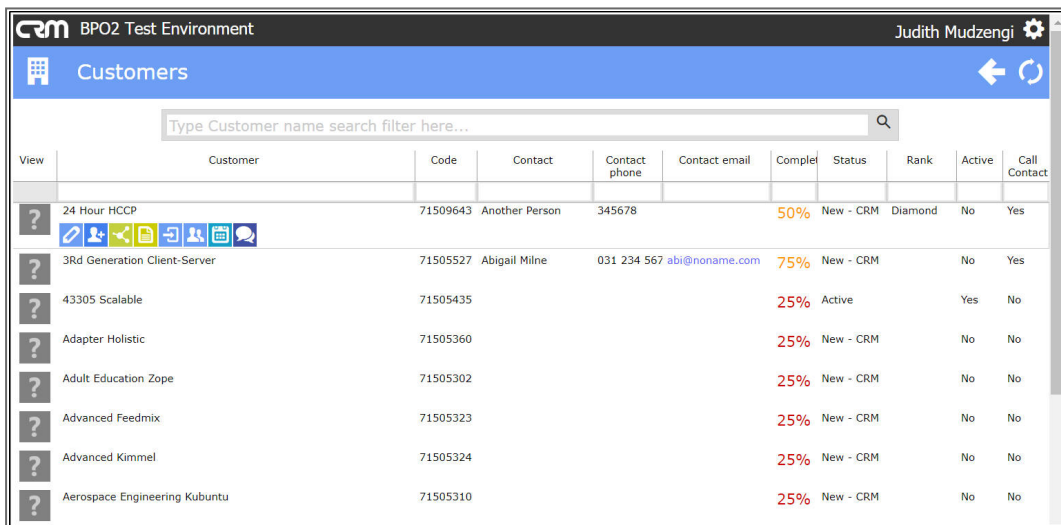
### ACCESS QUOTES FROM CUSTOMER DASHBOARD

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1. Click on the **Customers** tile from the **Dashboard**.

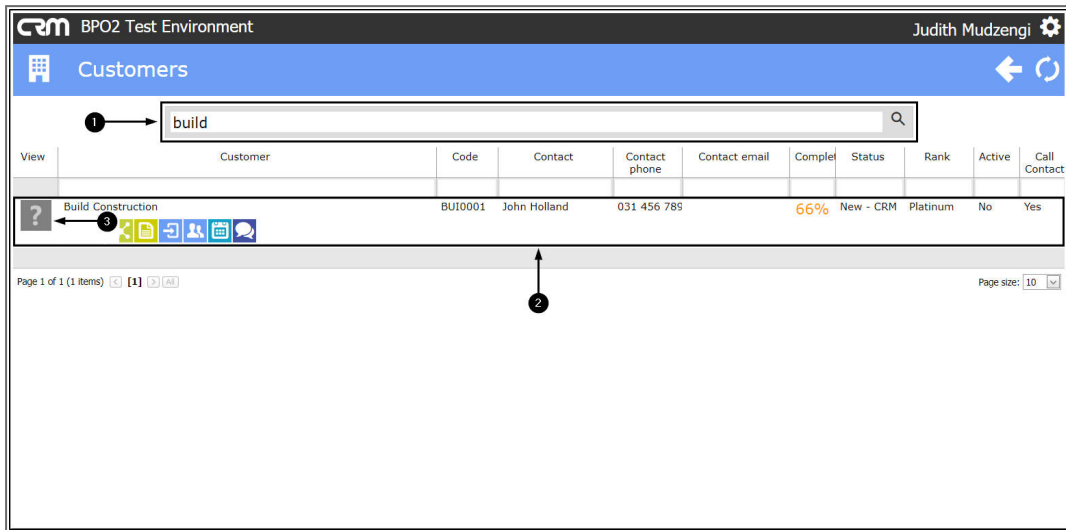


- The **Customers** screen will be displayed.
- A list of customers will be displayed.

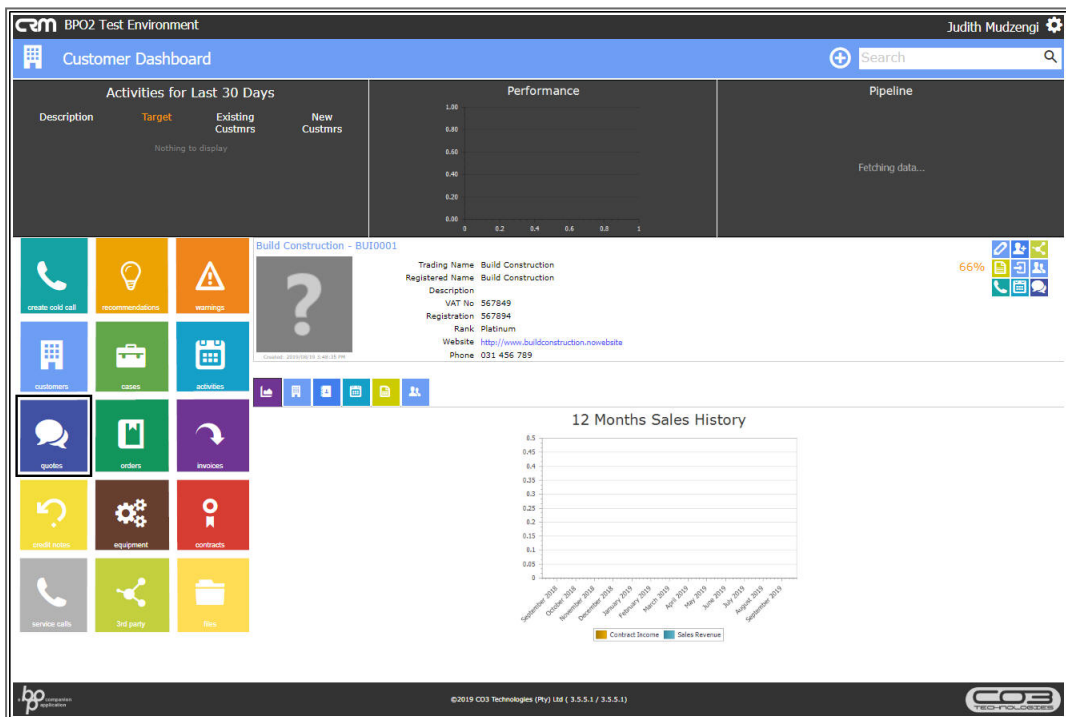


1. Type in the customer name you wish to access quotes for in the **Search** bar.

2. The customer will be displayed.
3. Click on the **View** icon.



- The **Customer Dashboard** screen will be displayed.
- Click on the **Quotes** tile.



- The **Quotes for [ ]** screen will be displayed.
- The selected customer's quotes will be displayed.

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0010363	BUI0001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	Customer Rejected Quote	No
QT0010364	BUI0001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	New Quote	No

## ACCESS QUOTES FROM THE DASHBOARD

1. Click on the **Quotes** tile from the **Dashboard**.
2. This shows the number of quotes.

- The **Quotes** screen will be displayed.
- A list of quotes for your customers will be displayed.

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0010358	HOP0001	Hope Works		1222.33	ZAR	15 Aug 2019	New Quote	No
QT0010257	71500016	Adaptive Directional	Test 1	1422.21	ZAR	17 Nov 2018	Invoiced Quote	Yes
QT0010360	HOP0001	Hope Works		1001.99	ZAR	19 Aug 2019	New Quote	No
QT0010362	BU10001	Build Construction	Quote	1534.36	ZAR	27 Aug 2019	New Quote	No
QT0010363	BU10001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	New Quote	No
QT0010364	BU10001	Build Construction	Quote	21366.51	ZAR	27 Aug 2019	New Quote	No

## CLONE A QUOTE FROM QUOTE LISTING SCREEN

- Click on the **Create Copy of Quote icon** on the quote you wish to clone.

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0010358	HOP0001	Hope Works		1222.33	ZAR	15 Aug 2019	New Quote	Yes
QT0010257	71500016	Adaptive Directional	Test 1	1422.21	ZAR	17 Nov 2018	Invoiced Quote	Yes
QT0010360	HOP0001	Hope Works		1001.99	ZAR	19 Aug 2019	Customer Accepted Quote	Yes
QT0010363	BU10001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	Customer Rejected Quote	No
QT0010364	BU10001	Build Construction	Quote	21366.51	ZAR	27 Aug 2019	New Quote	No

- The **Create Copy Quote of [ ]** screen will be displayed.

Customer	* Customer for New Quote Hope Works
Quote Financials	Keep Prices <input type="checkbox"/> Keep the prices from the original quote.
Case	Related Case Not linked to a case

[Create Copy](#)

- **Customer:**
  1. will be populated with the same customer from the original quote. This can be left as is, or
  2. changed to another customer by clicking on the **drop-down arrow** and selecting an alternative customer.

Customer	* Customer for New Quote <input type="text" value="Hope Works"/> ← 1
Quote Financials	Keep Prices <input type="checkbox"/> Keep the prices from the original quote.
Case	Related Case Not linked to a case

[Create Copy](#)

- **Quote Financials:** Select whether to keep the prices from the original quote, or apply the client's specific commercial pricing. For more information, refer to [How The Keep Prices Option Works](#).

- **Case:**
  1. Leave unlinked or
  2. link the new quote to a case by clicking on the **drop-down arrow** and selecting the relevant case.

1. Click on either the **Create Copy** button or
2. **Create Copy** icon.

- The **Save Quote** screen will be displayed.
- Edit the quote as required. You can also **edit line items**, **add new line items** or **remove line items**.

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
669	INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	197.80	197.80	197.80		227.47	
670	INVN	2HS08190	SPRING ACTUATOR	1.00	0.00	0.00	0.00	865.09	865.09	865.09		994.85	
				2.00	0.00	0.00	0.00	1062.89	1062.89	1062.89		1222.33	

1. Click on either the **Save** button or
2. **Save** icon.



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**Save Quote**

Case: Subject Meeting

Quote:
 

- \* A quote will only be created if you add quote line items.
- \* Customer: Hope Works
- \* Quote Contact: John Smith
- Quote Reference: REF00000
- Reference: Quote
- Comments: Quote
- Date: 4 Sep 2019
- \* Site: London
- \* Print Layout: SALESQUOTE\_Marius

Quote Financials:
 

- \* Currency: South African Rand
- Tax Rate: 15.000
- \* Exchange Rate: 1.0000
- Quote Terms: Cash on Delivery
- Commercial: Default

Quote Items:

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
669	INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	197.80	197.80	197.80		227.47	
670	INVN	2HS08190	SPRING ACTUATOR	1.00	0.00	0.00	0.00	865.09	865.09	865.09		994.85	
				2.00	0.00	0.00	0.00	1062.89	1062.89	1062.89		1222.33	

**Save**

- A message will pop up telling you;
  - **Quote saved successfully.**

Quote saved successfully.

**Save Quote**

Case: Subject Meeting

Quote:
 

- \* A quote will only be created if you add quote line items.
- \* Customer: Hope Works
- \* Quote Contact: John Smith
- Quote Reference: QT0010368
- Reference: Quote
- Comments: Quote
- Date: 4 Sep 2019
- \* Site: London
- \* Print Layout: SALESQUOTE\_Marius

Quote Financials:
 

- \* Currency: South African Rand
- Tax Rate: 15.00000
- \* Exchange Rate: 1.00000
- Quote Terms: Cash on Delivery
- Commercial: Default

Quote Items:

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
687	INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	197.80	197.80	197.80		227.47	
688	INVN	2HS08190	SPRING ACTUATOR	1.00	0.00	0.00	0.00	865.09	865.09	865.09		994.85	
				2.00	0.00	0.00	0.00	1062.89	1062.89	1062.89		1222.33	

**Delete** **View** **Save** **Copy**

- To view the newly created quote, go to the **Quotes screen**.
- The new quote will be displayed in the quotes list.

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Quotes

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0010365	HOP0001	Hope Works		1116.99	ZAR	03 Sep 2019	Customer Accepted Quote	No
QT0010366	HOP0001	Hope Works		1001.99	ZAR	03 Sep 2019	Customer Rejected Quote	No
QT0010368	HOP0001	Hope Works	Quote	1222.33	ZAR	04 Sep 2019	New Quote	No
QT0010358	HOP0001	Hope Works		1222.33	ZAR	15 Aug 2019	New Quote	Yes
QT0010257	71500016	Adaptive Directional	Test 1	1422.21	ZAR	17 Nov 2018	Invoiced Quote	Yes
QT0010360	HOP0001	Hope Works		1001.99	ZAR	19 Aug 2019	Customer Accepted Quote	Yes
QT0010363	BUJ0001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	Customer Rejected Quote	No
QT0010364	BUJ0001	Build Construction	Quote	34500.00	ZAR	27 Aug 2019	New Quote	No

Page 1 of 1 (8 items) Page size: 10

## CLONE A QUOTE FROM QUOTE MAINTAIN SCREEN

- Either click on the **Edit Quote icon** of the quote you wish to clone.

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Quotes

QT0010365	HOP0001	Hope Works		1116.99	ZAR	03 Sep 2019	Customer Accepted Quote	No
QT0010366	HOP0001	Hope Works		1001.99	ZAR	03 Sep 2019	Customer Rejected Quote	No
QT0010368	HOP0001	Hope Works	Quote	1222.33	ZAR	04 Sep 2019	New Quote	No
QT0010358	HOP0001	Hope Works		1222.33	ZAR	15 Aug 2019	New Quote	Yes
QT0010257	71500016	Adaptive Directional	Test 1	1422.21	ZAR	17 Nov 2018	Invoiced Quote	Yes
QT0010360	HOP0001	Hope Works		1001.99	ZAR	19 Aug 2019	Customer Accepted Quote	Yes
QT0010363	BUJ0001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	Customer Rejected Quote	No
QT0010364	BUJ0001	Build Construction	Quote	34500.00	ZAR	27 Aug 2019	New Quote	No

Page 1 of 1 (8 items) Page size: 10

- The **Save Quote** screen will be displayed.
- Click on **Copy**.

CRM BPO2 Test Environment Judith Mudzengi

**Save Quote**

**Case** Subject: New cement products

**Quote**

- \* A quote will only be created if you add quote line items.
- \* Customer: Build Construction
- \* Quote Contact: Clere Zodwa
- Quote Reference: QT0010364
- Reference: Quote
- Comments: Quote
- Date: 27 Aug 2019
- \* Site: London
- \* Print Layout: SALESQUOTE

**Quote Financials**

- \* Currency: South African Rand
- Tax Rate: 15.00000
- \* Exchange Rate: 10.0000
- Quote Terms: Cash on Delivery
- Commercial: Default

**Quote Items**

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
681	INVN	ZHS08110	ACTUATOR MPF	1.00	0.00	0.00	0.00	2000.00	2000.00	2000.00		2300.00	
682	INVN	FS-1018MFP	FS 1018MFP	1.00	0.00	0.00	0.00	1000.00	1000.00	1000.00		1150.00	
				2.00	0.00	0.00	0.00	3000.00	3000.00	3000.00		3450.00	

Buttons: Delete, View, Save, Copy

- Or after saving a new quote, click on **Copy**.

Quote saved successfully.

**Save Quote**

**Case** Subject: Meeting

**Quote**

- \* A quote will only be created if you add quote line items.
- \* Customer: Hope Works
- \* Quote Contact: John Smith
- Quote Reference: QT0010368
- Reference: Quote
- Comments: Quote
- Date: 4 Sep 2019
- \* Site: London
- \* Print Layout: SALESQUOTE\_Marius

**Quote Financials**

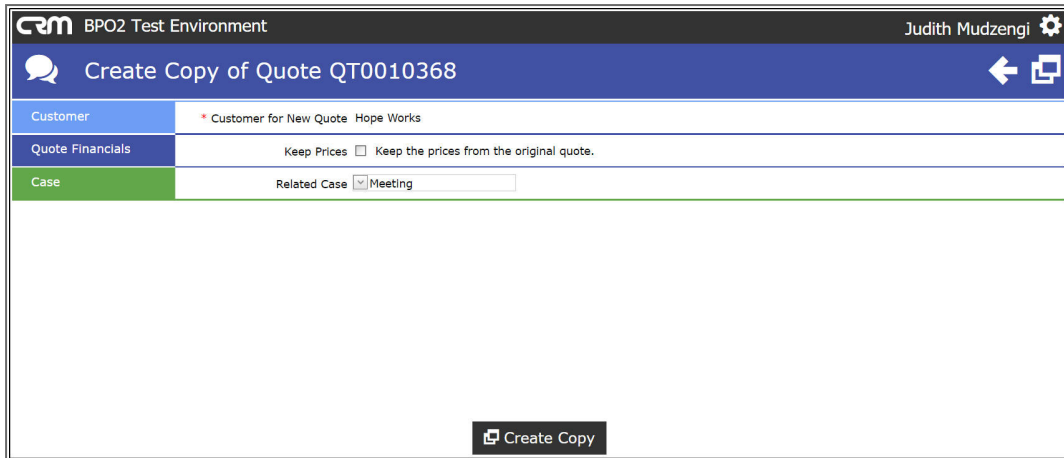
- \* Currency: South African Rand
- Tax Rate: 15.00000
- \* Exchange Rate: 1.00000
- Quote Terms: Cash on Delivery
- Commercial: Default

**Quote Items**

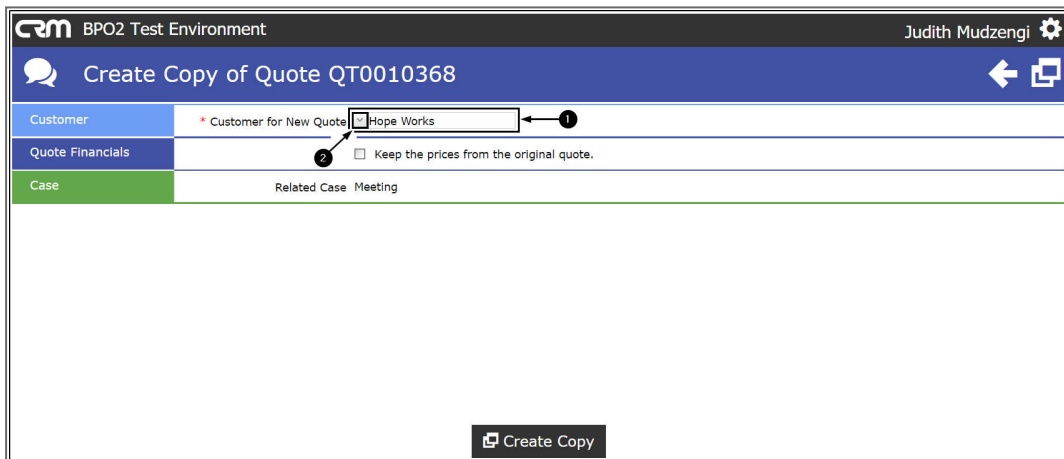
Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
687	INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	197.80	197.80	197.80		227.47	
688	INVN	ZHS08190	SPRING ACTUATOR	1.00	0.00	0.00	0.00	865.09	865.09	865.09		994.85	
				2.00	0.00	0.00	0.00	1062.89	1062.89	1062.89		1222.33	

Buttons: Delete, View, Save, Copy

- The **Create Copy Quote of [ ]** screen will be displayed.



- **Customer:**
  1. will be populated with the same customer from the original quote. This can be left as is, or
  2. changed to another customer by clicking on the **drop-down arrow** and selecting an alternative customer.

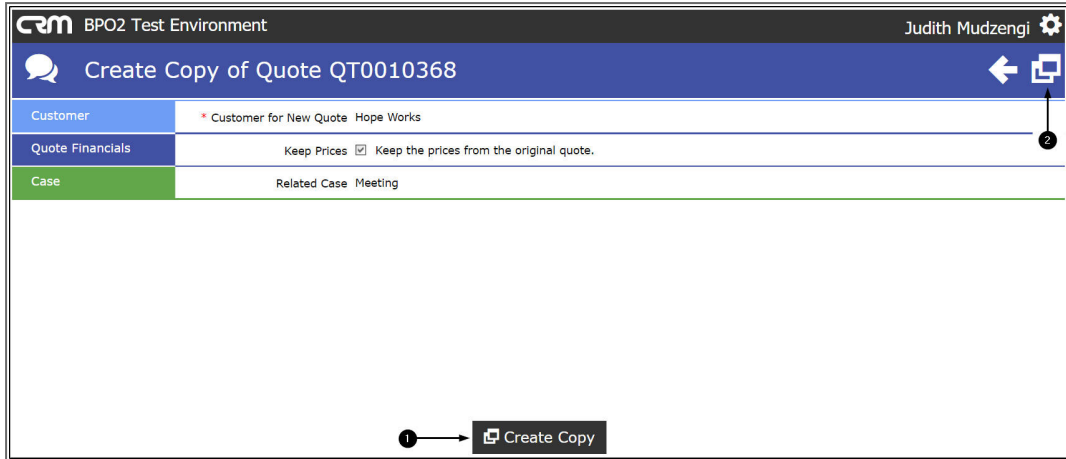


- **Quote Financials:** Select whether to keep the prices from the original quote, or apply the client's specific commercial pricing. For more information, refer to [How The Keep Prices Option Works](#).

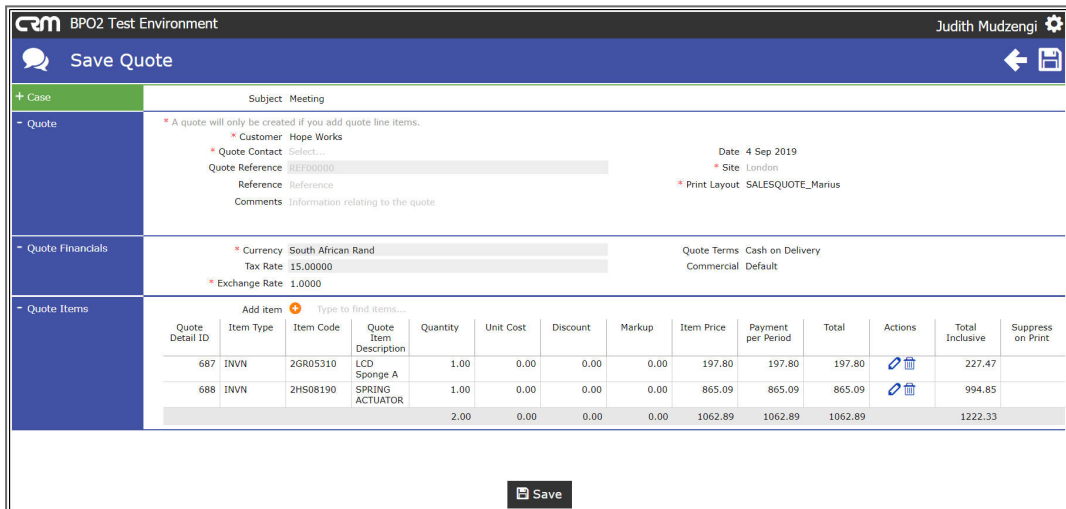
- **Case:**

1. will be populated with the same case from the original quote. This can be left as is, or
2. can be linked to another case by clicking on the **drop-down arrow** and selecting an alternative case or
2. can be unlinked from the case by clicking on the **drop-down arrow** and selecting **Not linked to a case** option.

1. Click on either the **Create Copy** button or
2. **Create Copy** icon.



- The **Save Quote** screen will be displayed.
- Edit the quote as required. You can also **edit line items**, **add new line items** or **remove line items**.



1. Click on either the **Save** button or
2. **Save** icon.

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**Save Quote**

**Case** Subject Meeting

**Quote**

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

\* Customer Hope Works

\* Quote Contact John Smith

Quote Reference BFT000001

Reference Quote for requested products

Comments Quote for requested products

Date 4 Sep 2019

\* Site London

\* Print Layout SALESQUOTE\_Marius

**Quote Financials**

\* Currency South African Rand

Tax Rate 15.00000

\* Exchange Rate 1.00000

Quote Terms Cash on Delivery

Commercial Default

**Quote Items**

Add item Type to find items...

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
687	INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	197.80	197.80	197.80		227.47	
688	INVN	2HS08190	SPRING ACTUATOR	1.00	0.00	0.00	0.00	865.09	865.09	865.09		994.85	
				2.00	0.00	0.00	0.00	1062.89	1062.89	1062.89		1222.33	

Save

- A message will pop up telling you;
  - **Quote saved successfully.**

Quote saved successfully.

**Save Quote**

**Case** Subject Meeting

**Quote**

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

\* Customer Hope Works

\* Quote Contact John Smith

Quote Reference QT0010369

Reference Quote for requested products

Comments Quote for requested products

Date 4 Sep 2019

\* Site London

\* Print Layout SALESQUOTE\_Marius

**Quote Financials**

\* Currency South African Rand

Tax Rate 15.00000

\* Exchange Rate 1.00000

Quote Terms Cash on Delivery

Commercial Default

**Quote Items**

Add item Type to find items...

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
689	INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	197.80	197.80	197.80		227.47	
690	INVN	2HS08190	SPRING ACTUATOR	1.00	0.00	0.00	0.00	865.09	865.09	865.09		994.85	
				2.00	0.00	0.00	0.00	1062.89	1062.89	1062.89		1222.33	

Delete View Save Copy

- To view the newly created quote, go to the **Quotes screen**.
- The new quote will be displayed in the quotes list.

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0010365	HOP0001	Hope Works		1116.99	ZAR	03 Sep 2019	Customer Accepted Quote	No
QT0010366	HOP0001	Hope Works		1001.99	ZAR	03 Sep 2019	Customer Rejected Quote	No
QT0010368	HOP0001	Hope Works	Quote	1222.33	ZAR	04 Sep 2019	New Quote	No
QT0010369	HOP0001	Hope Works	Quote for requested products	1222.33	ZAR	04 Sep 2019	New Quote	No
QT0010358	HOP0001	Hope Works		1222.33	ZAR	15 Aug 2019	New Quote	Yes
QT0010257	71500016	Adaptive Directional	Test 1	1422.21	ZAR	17 Nov 2018	Invoiced Quote	Yes
QT0010360	HOP0001	Hope Works		1001.99	ZAR	19 Aug 2019	Customer Accepted Quote	Yes
QT0010363	BUJ0001	Build Construction	Quote	2136.65	ZAR	27 Aug 2019	Customer Rejected Quote	No
QT0010364	BUJ0001	Build Construction	Quote	34500.00	ZAR	27 Aug 2019	New Quote	No

## KEEP PRICES OPTION

This section only covers different scenarios of how the **Keep Prices** option works. For the full process on how to clone a quote, refer to [Clone A Quote From The Quote Listing Screen](#) and or [Clone A Quote From The Quote Maintain Screen](#).

## COPY A QUOTE: DIFFERENT COMMERCIAL FROM ORIGINAL QUOTE

- In the examples below,
  1. the quote that will be cloned is for **Hope Works**,
  2. has **Default** commercial and
  3. the line items prices are **197.80** and **865.09** respectively.



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**Save Quote**

**Case** Subject: Meeting

**Quote**

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

\* Customer: Hope Works

\* Quote Contact: John Smith

Quote Reference: QT0010369

Reference: Quote for requested products

Comments: Quote for requested products

Date: 4 Sep 2019

\* Site: London

\* Print Layout: SALESQUOTE\_Marius

**Quote Financials**

\* Currency: South African Rand

Tax Rate: 15.00000

\* Exchange Rate: 1.0000

Quote Terms: Cash on Delivery

Commercial: Default

**Quote Items**

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
689	INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	197.80	197.80	197.80		227.47	
690	INVN	2HS08190	SPRING ACTUATOR	1.00	0.00	0.00	0.00	865.09	865.09	865.09		994.85	
				2.00	0.00	0.00	0.00	1062.89	1062.89	1062.89		1222.33	

Buttons: Delete, View, Save, Copy

- Click on **Copy**.

CRM BPO2 Test Environment Judith Mudzengi

**Save Quote**

**Case** Subject: Meeting

**Quote**

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

\* Customer: Hope Works

\* Quote Contact: John Smith

Quote Reference: QT0010369

Reference: Quote for requested products

Comments: Quote for requested products

Date: 4 Sep 2019

\* Site: London

\* Print Layout: SALESQUOTE\_Marius

**Quote Financials**

\* Currency: South African Rand

Tax Rate: 15.00000

\* Exchange Rate: 1.0000

Quote Terms: Cash on Delivery

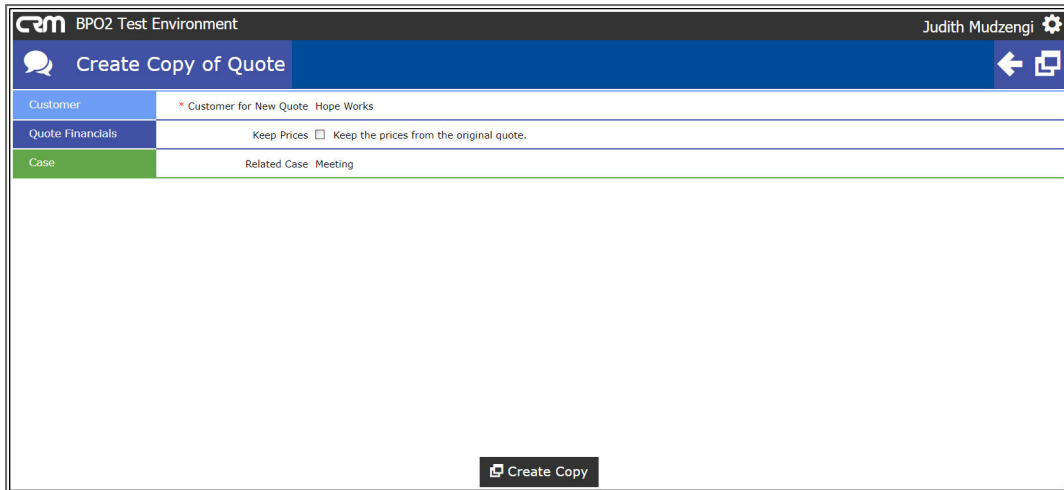
Commercial: Default

**Quote Items**

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
689	INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	197.80	197.80	197.80		227.47	
690	INVN	2HS08190	SPRING ACTUATOR	1.00	0.00	0.00	0.00	865.09	865.09	865.09		994.85	
				2.00	0.00	0.00	0.00	1062.89	1062.89	1062.89		1222.33	

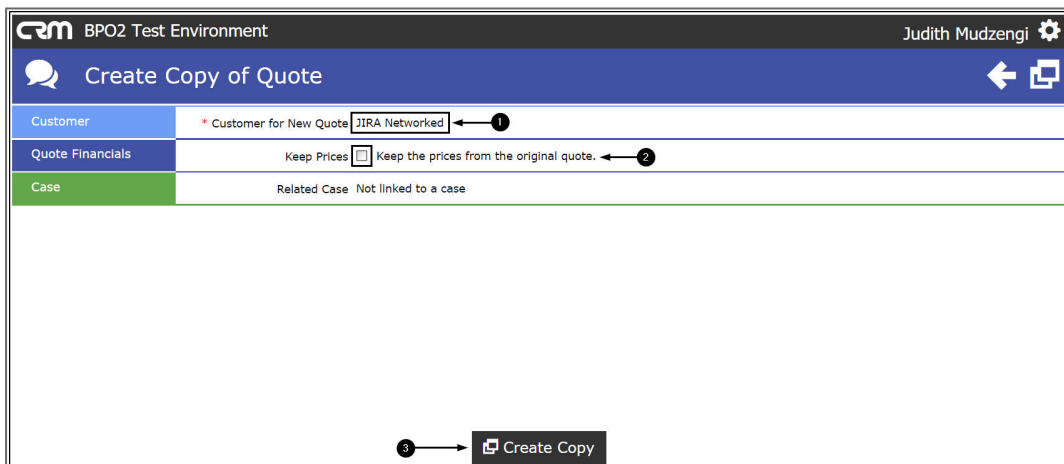
Buttons: Delete, View, Save, Copy

- The **Create Copy of Quote [ ]** screen will be displayed.



## DO NOT KEEP PRICES FIXED OPTION

1. A different customer has been selected and
2. the **Keep Prices** check box has not been ticked.
  - This means the prices from the original quote will not be maintained unless the selected customer has the same commercial and or same item prices as the original customer.
3. Click on **Create Copy**.



- The **Save Quote** screen will be displayed.
  1. The customer on the new quote is different from the original customer (whose quote was cloned) and has
  2. a different commercial ( **AbigailM** ) from the original customer (whose quote was cloned)
  3. therefore the line items prices have changed to those of **AbigailM** commercial since the option to keep prices of the original quote was not selected.
    - The prices are now **148.35** and **648.82** respectively.

The screenshot shows the 'Save Quote' interface in a CRM system. The top bar indicates 'BPO2 Test Environment' and the user 'Judith Mudzengi'. The main form is divided into sections: Case, Quote, Quote Financials, and Quote Items.

**Quote Section:**

- \* A quote will only be created if you add quote line items.
- \* Customer: **IRA Networked** (marked with 1)
- \* Quote Contact: Select...
- Quote Reference: REF00000
- Reference: Reference
- Comments: Information relating to the quote
- Date: 4 Sep 2019
- \* Site: London
- \* Print Layout: SALESQUOTE\_Marius

**Quote Financials Section:**

- \* Currency: South African Rand
- Tax Rate: 15.00000
- \* Exchange Rate: 1.0000
- Quote Terms: Cash on Delivery
- Commercial: **AbigailM** (marked with 2)

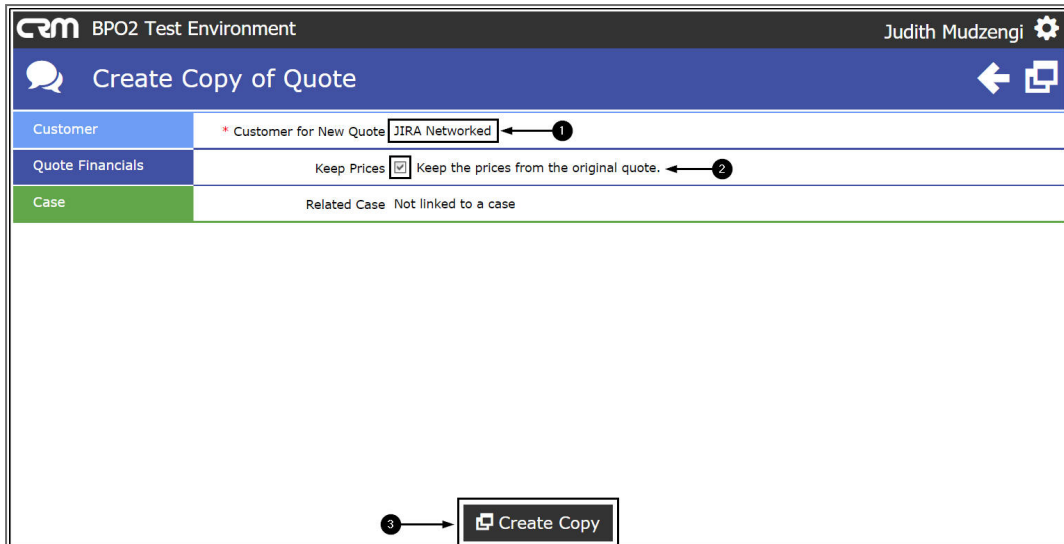
**Quote Items Table:**

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
689	INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	148.35	148.35	148.35		170.61	
690	INVN	2HS08190	SPRING ACTUATOR	1.00	0.00	0.00	0.00	648.82	648.82	648.82		746.14	
				2.00	0.00	0.00	0.00	797.17	797.17	797.17		916.75	

At the bottom of the form, there is a 'Save' button.

## KEEP PRICES FIXED OPTION

1. A different customer has been selected and
2. the **Keep Prices** check box has been ticked.
  - This means the prices of the original quote will be maintained even if the selected customer has a different commercial (prices) from the original customer.
3. Click on **Create Copy**.



CRM BPO2 Test Environment Judith Mudzengi	
Create Copy of Quote	
Customer	* Customer for New Quote <input type="text" value="JIRA Networked"/>
Quote Financials	Keep Prices <input checked="" type="checkbox"/> Keep the prices from the original quote.
Case	Related Case Not linked to a case
<input type="button" value="Create Copy"/>	

1. The customer on the new quote is different from the original customer (whose quote was cloned) and has
2. a different commercial ( **AbigailM** ) from the original customer (whose quote was cloned)
3. but the line items prices are the same as of the original quote although the commercial is different.
  - This is because the option to keep prices from the original quote was selected. The prices are **197.80** and **865.09** respectively.

CRM BPO2 Test Environment
Judith Mudzengi

Save Quote
←

+ Case Subject No case linked

Quote

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

\* Customer: **UBA Networked** ← 1

Quote Reference: **2579029**

Reference: Information relating to the quote

Comments: Information relating to the quote

Date: 6 Sep 2019

Site: London

\* Print Layout: Select layout...

Quote Financials

\* Currency: South African Rand

Tax Rate: 15.00

\* Exchange Rate: 1.0000

Quote Terms: Cash on Delivery

Commercial: **AbigailM** ← 2

Quote Items

Add Item Type to find items...

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
687	INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	197.80	197.80	197.80		227.47	
688	INVN	2HS08190	SPRING ACTUATOR	1.00	0.00	0.00	0.00	865.09	865.09	865.09		994.85	
				2.00	0.00	0.00	0.00	1062.89	1062.89	1062.89		1222.33	

← 3

Save

## COPY A QUOTE: SAME COMMERCIAL AND EDITED LINE ITEM PRICES

- In this image, the quote whose line item prices will be altered is for
  1. **Hope Works**,
  2. the commercial is **Default**,
  3. the line items prices pulling from the **Default** commercial are **197.80** and **865.09** respectively but they will be edited below.

CRM BPO2 Test Environment Judith Mudzengi

**Save Quote**

Case: Subject Meeting

Quote:
 

- \* A quote will only be created if you add quote line items.
- \* Customer: Hope Works
- \* Quote Contact: John Smith
- Quote Reference: QT0010368
- Reference: Quote
- Comments: Quote

 Date: 4 Sep 2019  
 Site: London  
 \* Print Layout: SALESQUOTE\_Marius

Quote Financials:
 

- \* Currency: South African Rand
- Tax Rate: 15.00000
- \* Exchange Rate: 1.0000

 Quote Terms: Cash on Delivery  
 Commercial: Default

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
687	INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	197.80	197.80	197.80		227.47	
688	INVN	2HS08190	SPRING ACTUATOR	1.00	0.00	0.00	0.00	865.09	865.09	865.09		994.85	
				2.00	0.00	0.00	0.00	1062.89	1062.89	1062.89		1222.33	

Buttons: Delete, View, Save, Copy

1. The quote line item prices have been edited to 300 and 1000 respectively.
2. The commercial has not been changed.
3. The changes have been saved.

- **Note:** The edited quote will be referred to as the original quote.

Quote saved successfully.

**Save Quote**

Case: Subject Meeting

Quote:
 

- \* A quote will only be created if you add quote line items.
- \* Customer: Hope Works
- \* Quote Contact: John Smith
- Quote Reference: QT0010368
- Reference: Quote
- Comments: Quote

 Date: 4 Sep 2019  
 Site: London  
 \* Print Layout: SALESQUOTE\_Marius

Quote Financials:
 

- \* Currency: South African Rand
- Tax Rate: 15.00000
- \* Exchange Rate: 1.0000

 Quote Terms: Cash on Delivery  
 Commercial: Default

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
687	INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	300.00	300.00	300.00		345.00	
688	INVN	2HS08190	SPRING ACTUATOR	1.00	0.00	0.00	0.00	1000.00	1000.00	1000.00		1150.00	
				2.00	0.00	0.00	0.00	1300.00	1300.00	1300.00		1495.00	

Buttons: Delete, View, Save, Copy

- Click on **Copy** to clone the edited quote.

Quote saved successfully.

**Save Quote**

Case: Subject Meeting

Quote:
 

- \* A quote will only be created if you add quote line items.
- \* Customer Hope Works
- Quote Contact John Smith
- Quote Reference QT0010368
- Reference Quote
- Comments Quote

Quote Financials:
 

- \* Currency South African Rand
- Tax Rate 15.00000
- \* Exchange Rate 1.0000
- Quote Terms Cash on Delivery
- Commercial Default

Quote Items:

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
687	INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	300.00	300.00	300.00		345.00	
688	INVN	2HS08190	SPRING ACTUATOR	1.00	0.00	0.00	0.00	1000.00	1000.00	1150.00		1150.00	
				2.00	0.00	0.00	0.00	1300.00	1300.00	1300.00		1495.00	

Buttons: Delete, View, Save, Copy

- The **Create Copy of Quote [ ]** screen is displayed.

CRM BPO2 Test Environment Judith Mudzengi

**Create Copy of Quote**

Customer: \* Customer for New Quote Hope Works

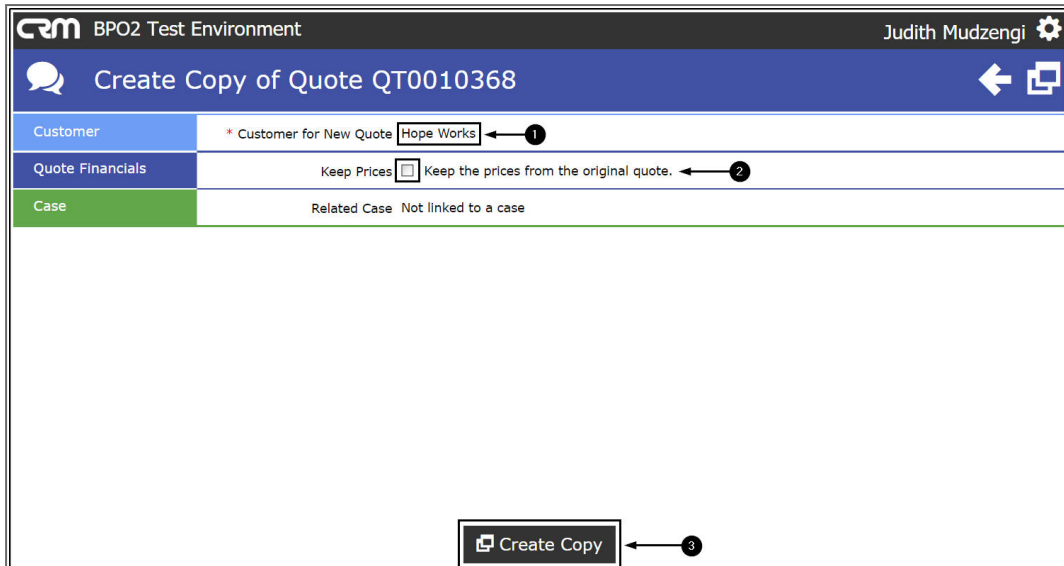
Quote Financials: Keep Prices  Keep the prices from the original quote.

Case: Related Case Meeting

Buttons: Create Copy

## DO NOT KEEP PRICES FIXED OPTION

1. The same customer has been selected and
2. the **Keep Prices** check box has not been ticked.
  - This means the prices from the original quote will not be maintained unless the selected customer has the same commercial and or same item prices as the original customer.
3. Click on **Create Copy**.



CRM BPO2 Test Environment		Judith Mudzengi
Create Copy of Quote QT0010368		
Customer	* Customer for New Quote <span>Hope Works</span>	
Quote Financials	Keep Prices <input type="checkbox"/> Keep the prices from the original quote.	
Case	Related Case Not linked to a case	
<input type="button" value="Create Copy"/>		

1. The customer on the new quote is the same as the customer on the original quote and has
2. the same commercial ( **Default** ) as the original quote.
3. but the line items prices ( **197.80** and **865.09** ) reflected in the new quote are different from the original quote although the commercial and the customer are the same.
  - This is because
    - the line item prices from the original quote were edited and
    - the option to **Keep Prices** of the original quote was not selected.



**Save Quote**

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

\* Customer: Hope Works

\* Quote Contact: [Empty]

Quote Reference: REF00000

Date: 6 Sep 2019

\* Site: London

\* Print Layout: Select layout...

\* Currency: South African Rand

Tax Rate: 15.00

Quote Terms: Cash on Delivery

\* Exchange Rate: 1.0000

Commercial: Default

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
687	INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	197.80	197.80	197.80	[Edit] [Delete]	227.47	
688	INVN	2HS08190	SPRING ACTUATOR	1.00	0.00	0.00	0.00	865.09	865.09	865.09	[Edit] [Delete]	994.85	
				2.00	0.00	0.00	0.00	1062.89	1062.89	1062.89		1222.33	

**Save**

## KEEP PRICES FIXED OPTION

1. The same customer has been selected and
2. the **Keep Prices** check box has been ticked.
  - This means the prices of the original quote will be maintained.
3. Click on **Create Copy**.

**Create Copy of Quote QT0010368**

\* Customer for New Quote: Hope Works

Keep Prices  Keep the prices from the original quote.

Related Case: Not linked to a case

**Create Copy**

1. The customer on the new quote is the same as the customer on the original quote and has

2. the same commercial ( **Default** ) as the original quote.
3. and the line items prices are the same ( **300** and **1000** ) as of the original quote although they are not the prices set on the customer commercial ( **Default** ).
  - This is because
    - the line item prices of the original quote were edited
    - and **Keep Prices** of the original quote option was selected.

**CRM BPO2 Test Environment** Judith Mudzengi

**Save Quote**

Case: Subject No case linked

Quote:
 

- \* A quote will only be created if you add quote line items.
- \* Customer: Hope Works
- \* Quote Contact: Subject...
- Quote Reference: REF00000
- Reference: Reference
- Comments: Information relating to the quote
- Date: 6 Sep 2019
- \* Site: London
- \* Print Layout: SALESQUOTE\_Marius

Quote Financials:
 

- \* Currency: South African Rand
- Tax Rate: 15.00000
- \* Exchange Rate: 1.0000
- Quote Terms: Cash on Delivery
- Commercial: Default

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
687	INVN	2GR05310	LCD Sponge A	1.00	0.00	0.00	0.00	300.00	300.00	300.00		345.00	
688	INVN	2HS08190	SPRING ACTUATOR	1.00	0.00	0.00	0.00	1000.00	1000.00	1000.00		1150.00	
				2.00	0.00	0.00	0.00	1300.00	1300.00	1300.00		1495.00	

**Save**

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