

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

# **SALES STUDIO QUOTES**

# **ADD NOTES**

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 set out below to **add Notes** to a quote 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

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## **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.



#### Add Notes

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- 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 link **Notes** to.

Note 1: If you are creating a new quote, you do <u>not</u> need to select the Status. If you are adding Notes to a current quote then you <u>will</u> need to select the Status.

**Note 2**: Only quotes in Status: '**New Quote**' or '**Salesman Released Quote**' can have Notes added to them. However, if you Save a Copy of a quote, then the copy can have Notes added to it.

#### **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 <u>Using BPO Data Grids</u> and <u>Data Grid Filtering</u> for further information regarding data grid functionality that can be utilised here.

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