

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

# **SALES STUDIO QUOTES**

## **CONVERT QUOTE TO ORDER**

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 below to **Convert a Quote to an Order** 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

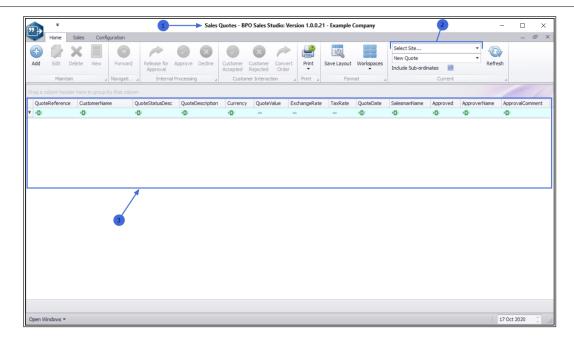


#### **SELECT THE SITE AND STATUS**

- 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.



### Convert Quote to Order



- 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 **Convert to an Order**.

**Note**: Only quotes in Status: ' ... ' can be Converted to an Order.

#### **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



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#### 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.

MNU.168.017