

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

SALES STUDIO QUOTES

PRINT SALES PROPOSAL

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 **Print a Sales Proposal** from 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

| m | Ŧ | BPO Sales Studio: Version 1.0.0.21 - Example Company | - | × |
|-----------------|-------|--|---|---|
| | Sales | Configuration | | |
| Quotes Sales | | | | |
| Sales | 4 | | | |

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.



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| | Home | Sales | Configu | ration | Ť | | | | | | | | | | | | - | . 8 × |
| Add | Edit | X | View | Forward | Release for | Approve 1 | Decline | Customer | Customer | Convert | Print | Save Layout | Workspaces | Select Site New Quote | | • • R | (C) Lefresh | |
| | | | | | Approval | | | Accepted | Rejected | Order | • | | • | Include Sub-ord | | | | |
| | Maint | tain | A | Navigati 🦼 | Interna | Processing | A | Custon | ner Interactio | n 4 | Print 🖌 | Form | nat 🦼 | | Current | | | |
| Drag a co | lumn hea | ader here t | to group by | that column | | | | | | | | | | | | | | / |
| | Referen | | omerName | | oteStatusDesc | - | escription | Currency | QuoteVa | lue Ex | changeRate | TaxRate | QuoteDate | SalesmanName | Approved | ApproverNar | | Comment |
| 9 R O C | | 8 0 0 | | -0 | | REC | | REC | - | - | | = | ROC | REC | R D C | ×∎c | * 🖬 c | |
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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 **Print the Proposal** of.

Note: Sales Proposals can be printed in <u>any</u> Status from the Sales Quotes listing screen. If you wish to print a quote from the Quote Maintain screen, then the quote is required to be **saved** first.

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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