

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

SALES STUDIO QUOTES

PRINT GROSS PROFIT ANALYSIS

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 Gross Profit Analysis** 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.



	Ŧ			1-	> Sale	s Quotes - BP	O Sales Studio:	Version 1.0.0.2	1 - Example	Company		2		>	×
~	Home S	ales Confi	guration									Γ		- 8	×
Ð	2 >	۲ 🔳	<	A			8	Image: A state of the state	2		Select Site			3	
Add	Edit Del	ete View	Forward	Release for Approval	Approve Decline	Customer Accepted	Customer Com Rejected Ord	vert Print		Workspaces	New Quote Include Sub-ord	inates 🔳	Refi		
	Maintain		Navigati "		Processing		er Interaction	A Print A	Form	nat "		Current			
-	Reference	CustomerNam		oteStatusDesc			QuoteValue	ExchangeRate	TaxRate	QuoteDate	SalesmanName		ApproverName		:
P REC		R C	-0	c	явс	R C	-	-	-	REC	R C	R 🖬 C	A C	# E C	
			3												
			•												

- 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 Gross Profit Analysis** of.

Note: Gross Profit Analysis can be printed in ' ... ' Status.

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.

MNU.168.019