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

SALES STUDIO QUOTES

INCLUDE SUBORDINATES

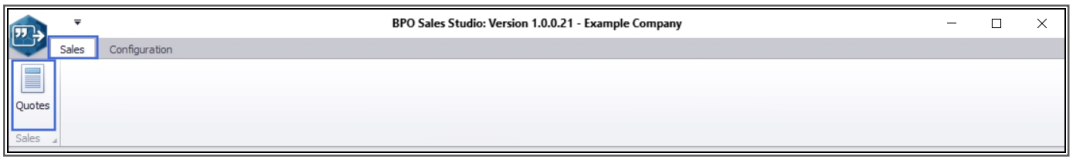
All quotes created in Sales Studio can be found in the **Sales Quotes** listing screen after selecting the applicable **Site** and **Status**.

The **include subordinates** flag allows a Sales Manager to view their own quotes along with the quotes raised by their subordinates (where this employee is set at the subordinates manager in the employee module).

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.

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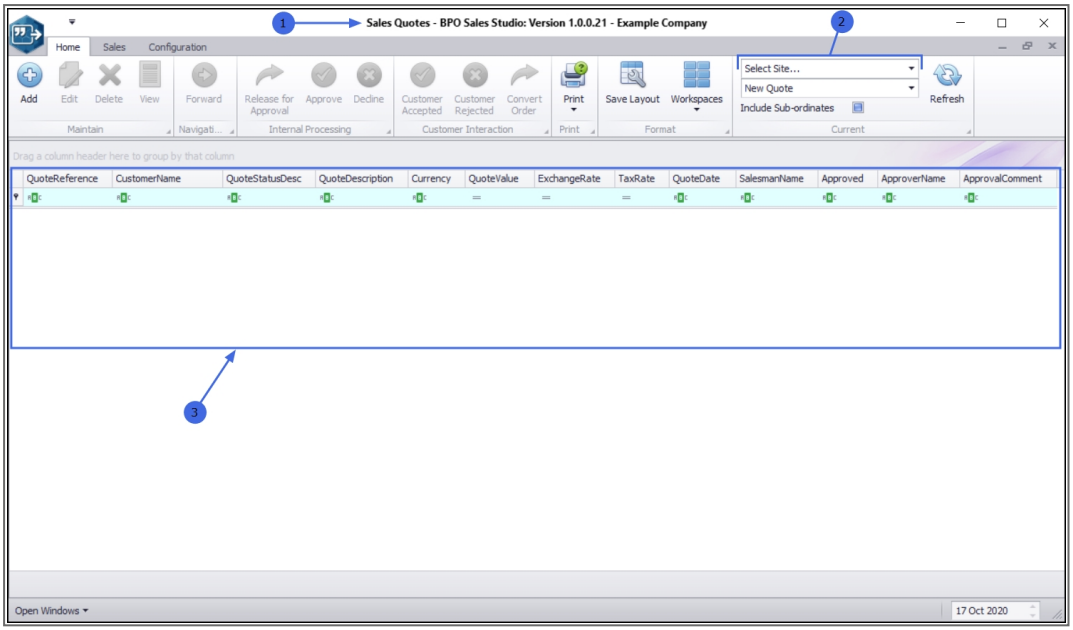

1. Click on the drop-down arrow in the **Site** field to display the **Site Name** menu.
2. If you are creating a new quote then you can continue without selecting the Status.
3. Select the **Include a Subordinate** flag to view own quotes and sub-ordinates' quotes.

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**:

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- Open Windows

4. **Data Grids**:
    - Refer to Using BPO Data Grids and Data Grid Filtering for further information regarding data grid functionality that can be utilised here.

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