

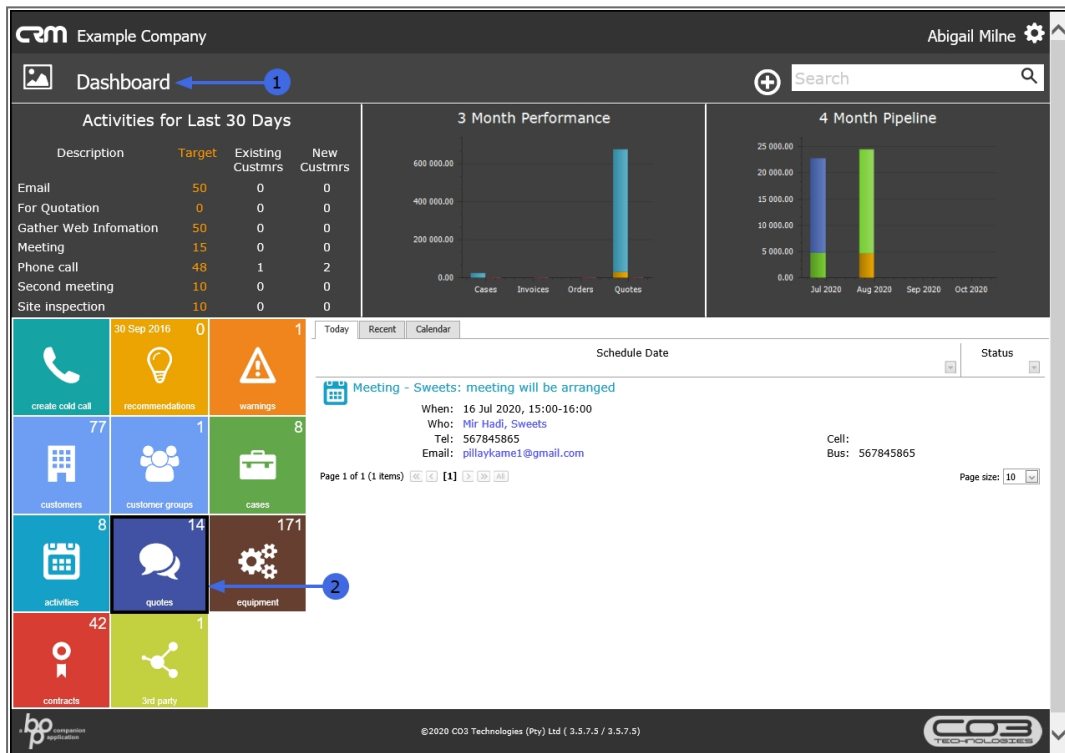
SALES

QUOTES – VIEW QUOTE IN CRM

Sales Quotes that have been created or edited in BPO2 will automatically pull through to **CRM**.

Ribbon Access:

1. From your web browser, navigate to the CRM **Homepage**.
2. Click on the **Quotes** tile.



The screenshot shows the CRM Dashboard for 'Example Company' with user 'Abigail Milne'. The dashboard includes a 'Dashboard' tab, a search bar, and several widgets. The 'Activities for Last 30 Days' table is as follows:

Description	Target	Existing Custmrs	New Custmrs
Email	50	0	0
For Quotation	0	0	0
Gather Web Information	50	0	0
Meeting	15	0	0
Phone call	48	1	2
Second meeting	10	0	0
Site inspection	10	0	0

The '3 Month Performance' chart shows data for Cases, Invoices, Orders, and Quotes. The '4 Month Pipeline' chart shows data for Jul 2020, Aug 2020, Sep 2020, and Oct 2020. The 'Quotes' tile is highlighted with a blue circle and arrow labeled '2'.

1. The **Quotes** listing page will open.
2. The Quote you have Created, Edited or Cloned in **BPO** is displayed in the Quotes list.

You can use the functionality on this page to:

3. View, Edit or Delete Quote,
4. Create a Copy (Clone) of the quote,
5. Accept Quote the quote or
6. Reject Quote the quote.

CRM Example Company Abigail Milne									
Quotes 1									
Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue	
QT0000292	BIG0001	Big Bargains	AB01_SalesStudio	241500.00	ZAR	27 May 2020	New Quote	Yes	
QT0000301	HOP001	Hope Works (Pty) Ltd	Test Marc	242921.94	ZAR	10 Jul 2020	New Quote	No	
QT0000302	HOP001	Hope Works (Pty) Ltd	Test Marc 02	1104.00	ZAR	10 Jul 2020	New Quote	No	
QT0000303	HOP001	Hope Works (Pty) Ltd	Copy of Test Marc 02	1104.00	ZAR	10 Jul 2020	New Quote	No	
QT0000304	HOP001	Hope Works (Pty) Ltd	Test Marc 03 From BPO	3450.00	ZAR	10 Jul 2020	Customer Accepted Quote	No	
QT0000305	BIG0001	Big Bargains	sales package	484506.50	ZAR	13 Jul 2020	Salesman Released Quote	No	
QT0000306	SWE0001	Sweets	default item	2794.50	ZAR	13 Jul 2020	New Quote	No	
QT0000307	BIG0001	Big Bargains	this is from BPO for CRM	621.00	ZAR	13 Jul 2020	New Quote	No	
QT0000308	HOP001	Hope Works (Pty) Ltd	Test Matt01	2150.50	ZAR	13 Jul 2020	Manager Approved Quote	No	
QT0000309	HOT0001	Hot Pink	Test Matt02	2150.50	ZAR	13 Jul 2020	New Quote	No	
QT0000310	DER001	Derton / Technologies	Test Matt03	299.54	ZAR	13 Jul 2020	New Quote	No	
QT0000311	KIN0001	King Copiers	KC001	12075.00	ZAR	14 Jul 2020	New Quote	No	
QT0000312	BIG0001	Big Bargains	BB001	6077.89	ZAR	14 Jul 2020	New Quote	No	
QT0000313	BIT001	Bits and Bytes	CloneQuote-AB02	17677.10	ZAR	15 Jul 2020	New Quote	No	

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