CRM CUSTOMERS

QUOTES

Client-specific quotes can be accessed from the Customer Homepage as set out below.

A full list of Quotes (linked to you as a Salesman) can be accessed from the Homepage.

In CRM you have the ability to

- **View**
- **Edit**
- **Print**
- **Accept** and
- **Reject**

Quotes for your Customers.

Once **'Accepted'** a Quote can no longer be edited.

Quotes can be added when

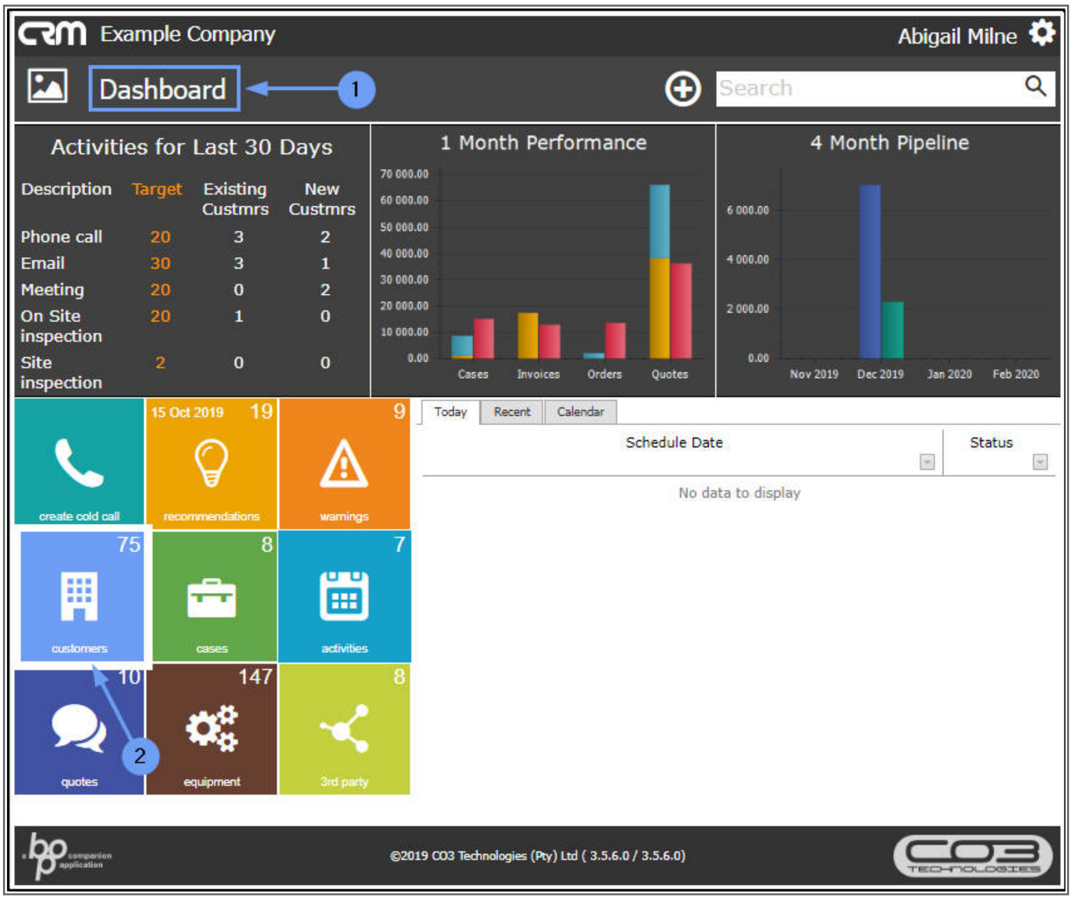
- creating a new Case or
- editing a Case
- adding or editing an Activity
- or from the Case and Activity lists.

Ribbon Access: *Webpage > http://[servername]:[port-no]/BPOCRM/User.aspx*

ACCESS CUSTOMER-SPECIFIC QUOTES FROM THE CUSTOMER HOMEPAGE

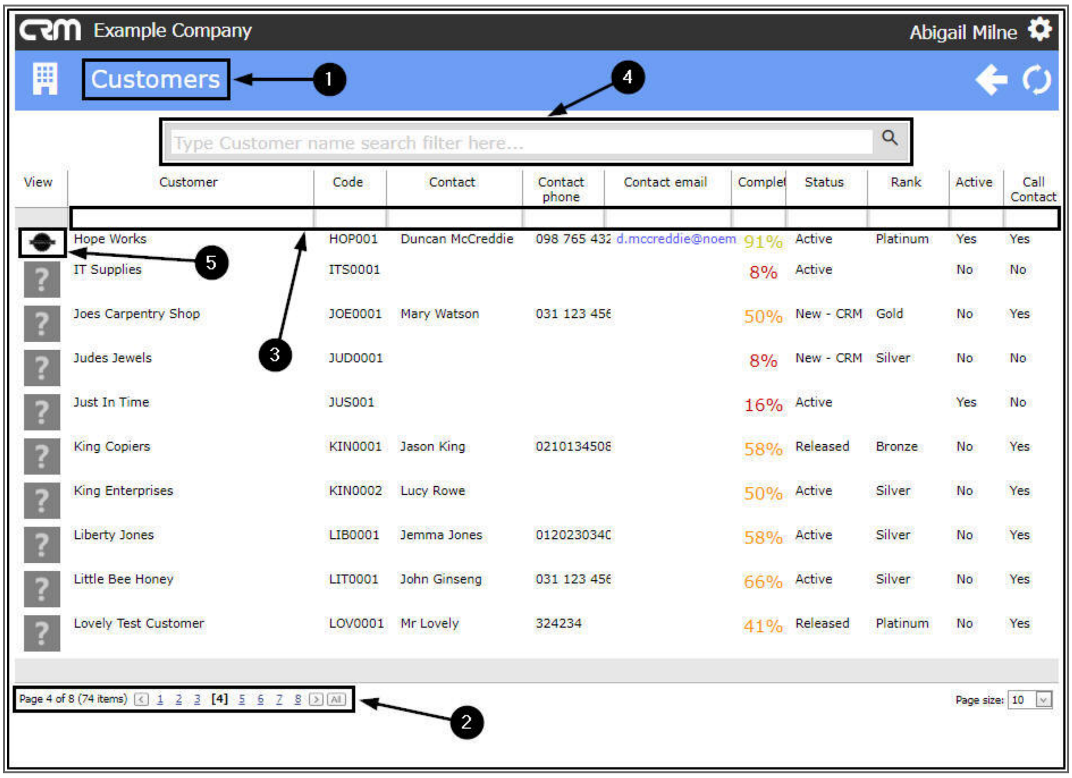
To access your customer-specific quotes, you will first need to navigate to the Customer Homepage.

1. In the ***Homepage***,
2. Click on the ***Customers*** tile.



1. The ***Customers*** listing page will open.
2. You can use the Page Reference field,
3. the Filter Row or

4. the Filter Text Box to ***search*** for your customer.
5. Click on the selected ***Customer icon*** in the ***View*** column.

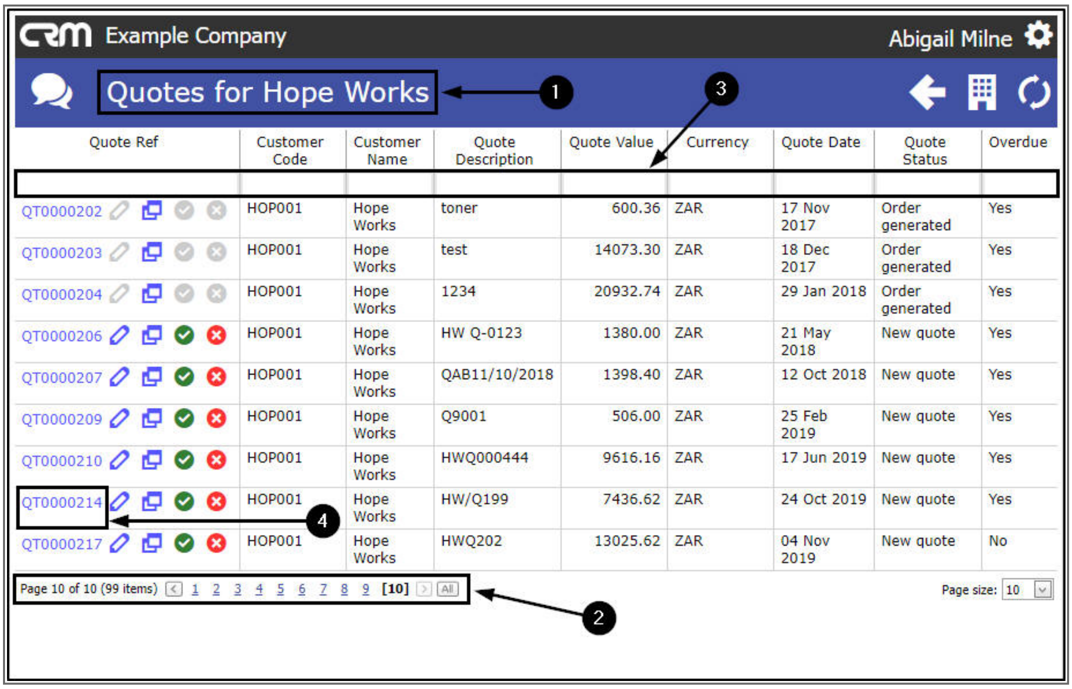


1. The ***Customer Homepage*** will open.
2. Click on the ***Quotes*** tile.

1. The ***Quotes for [selected customer]*** page will open.
    - All of the quotes linked to this customer will be displayed (even ones where you are not the Salesman).
2. You can use the Page Reference field or the
3. Filter Row to search for a particular Quote.

VIEW / DOWNLOAD / PRINT CUSTOMER QUOTE

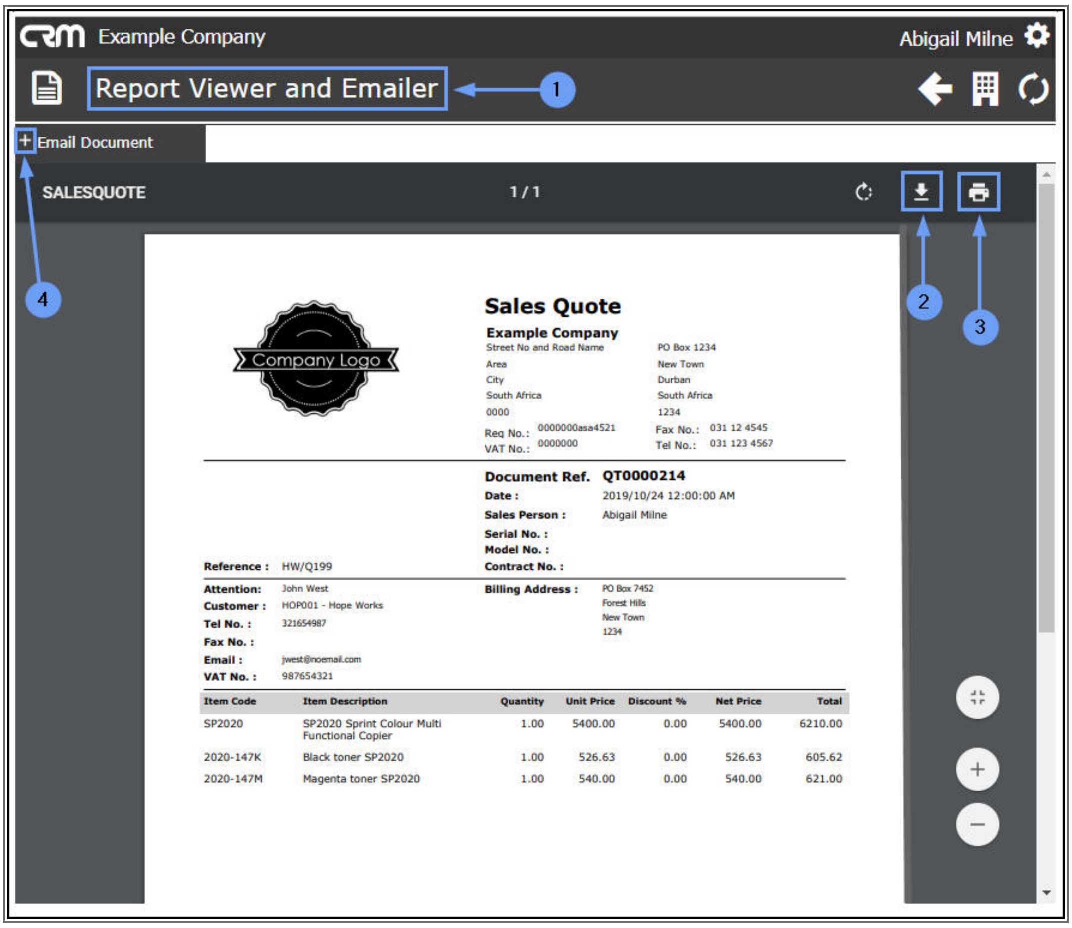
4. In the Quote Reference column, click on the blue ***number*** of the Quote that you wish to ***View***, ***Print***, ***Download*** or ***Email*** .



1. The ***Report Viewer and Emailer*** page will open.
   - The selected Quote will be displayed.
2. Here you can ***download*** the Quote and/or
3. ***Print*** the Quote.

EMAIL QUOTE

4. Click on the [**+**] sign on the ***Email Document*** tab.



1. The ***Email Document*** frame will be expanded.

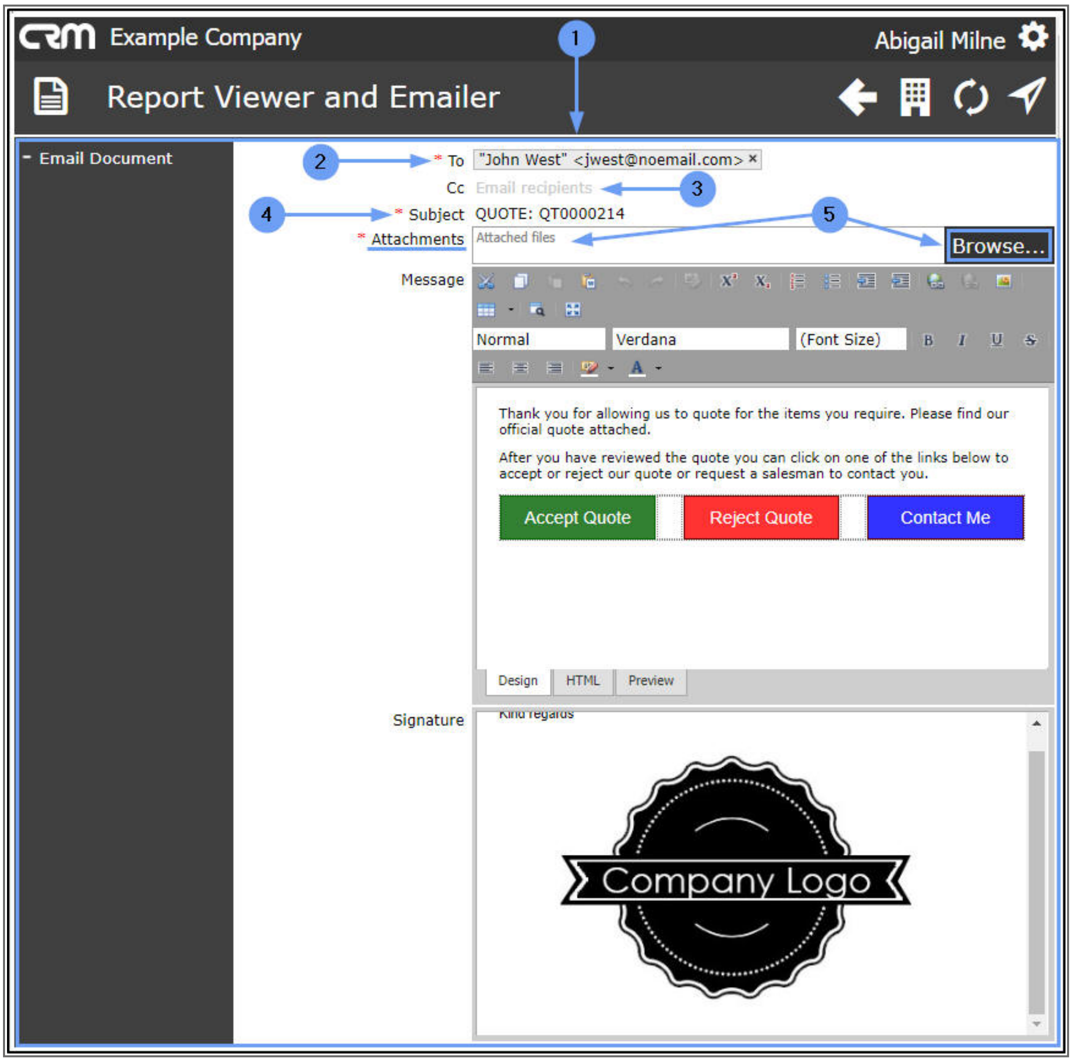
   Check and/or add the following details, as necessary:

2. **To:** This will auto populate with the CRM contact for the Quote (case) but you can change this, if required.
3. **Cc:** Here, you can add other email recipients, if applicable.
   - Either click in the field and select customer contacts from the list, or type in additional addresses as noted above (separated by a semi-colon and a space).
4. **Subject:** This field will auto populate with the selected Quote number but you can edit this, if required.

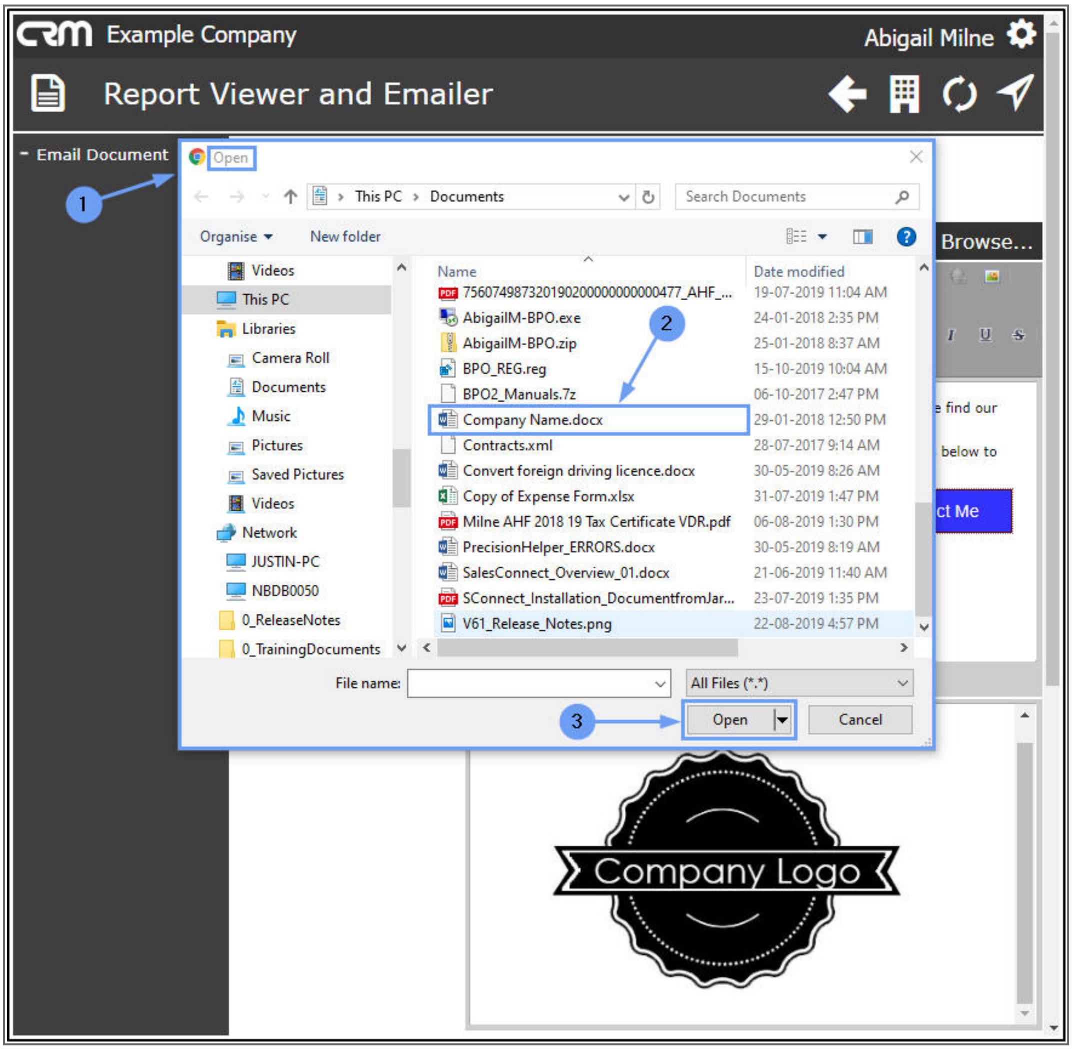
ADD AN ATTACHMENT

You can add other documents, as attachments, if required.

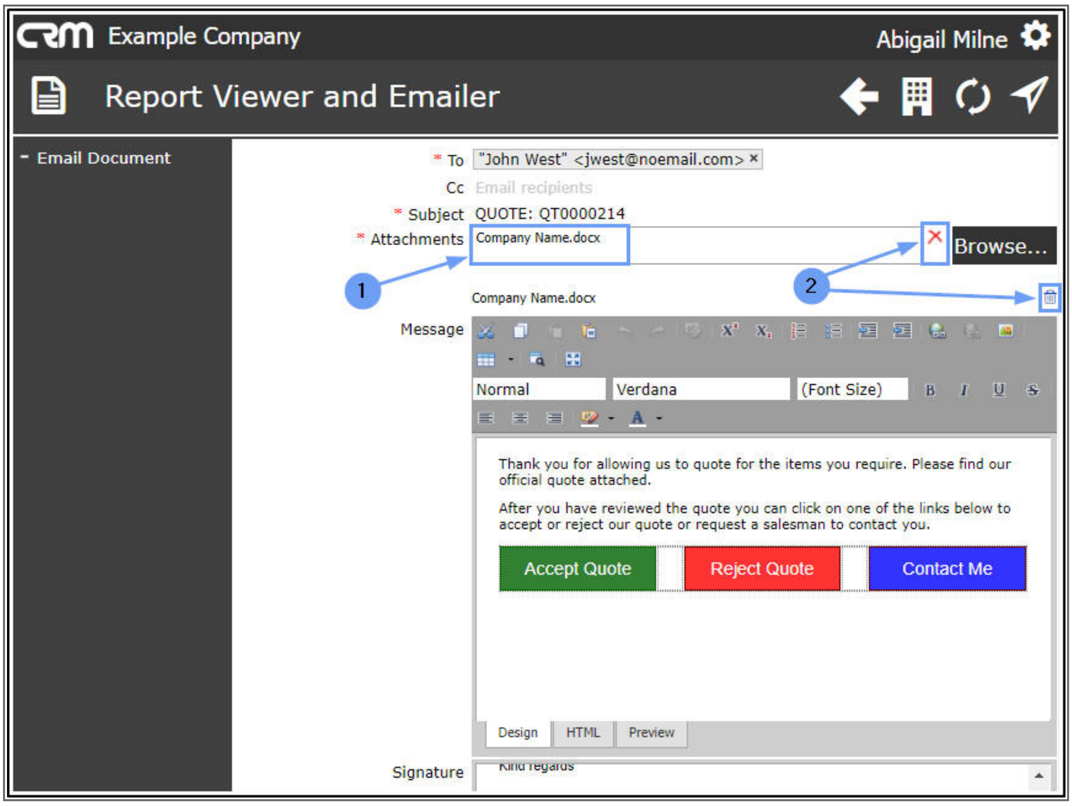
5. **Attachments:** Click on ***Browse***.



1. The ***Open*** screen will pop up.
2. Search for and select the file you wish to link.
3. Click on ***Open*** .



1. The file will now be attached to the email.
2. You can delete the attachment if required by clicking on either of the ***Delete*** icons.



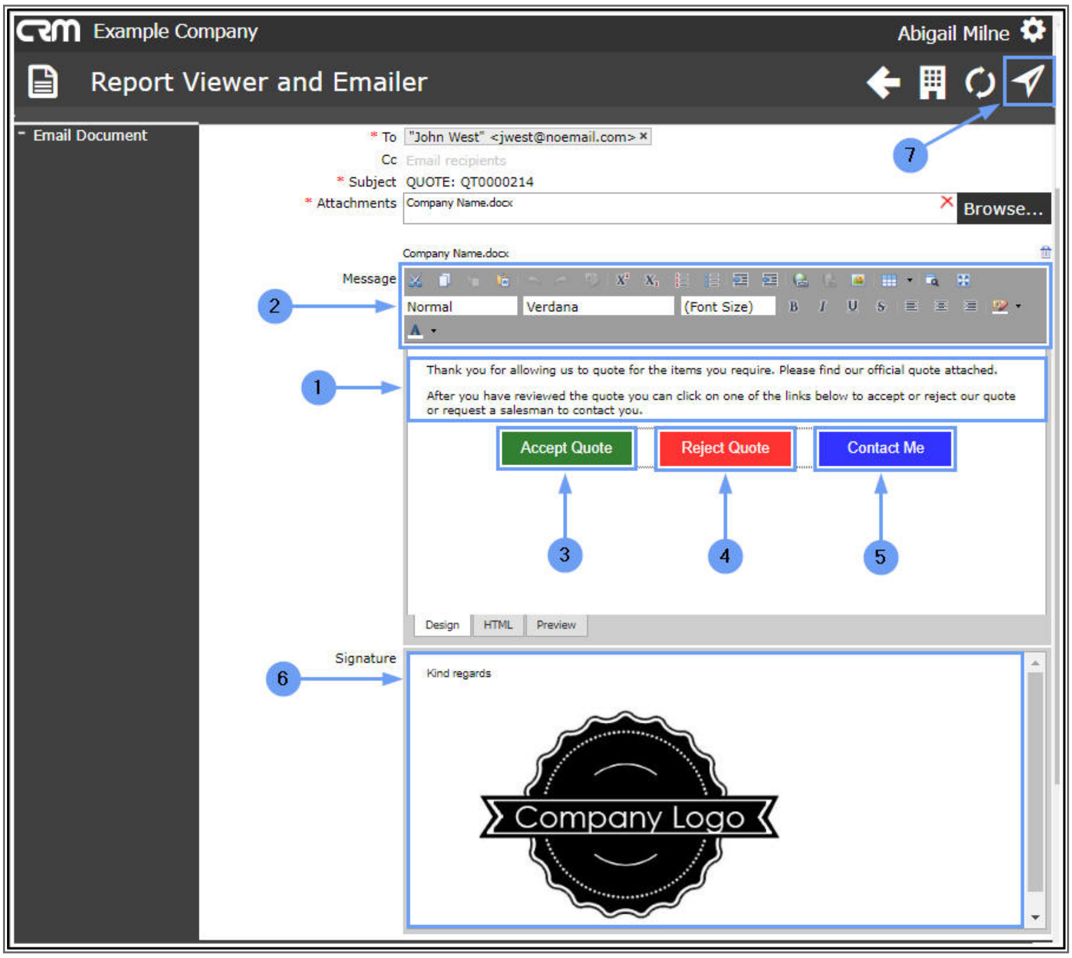
1. A default message will populate the ***Message body*** but this can be edited, if required.
    - Type in the relevant details in the message body.
2. The ***Message tool bar*** can be used to customise your email message.

EMAIL ACTION BUTTONS

The message body contains 3 **Action** buttons that allow the recipient to:

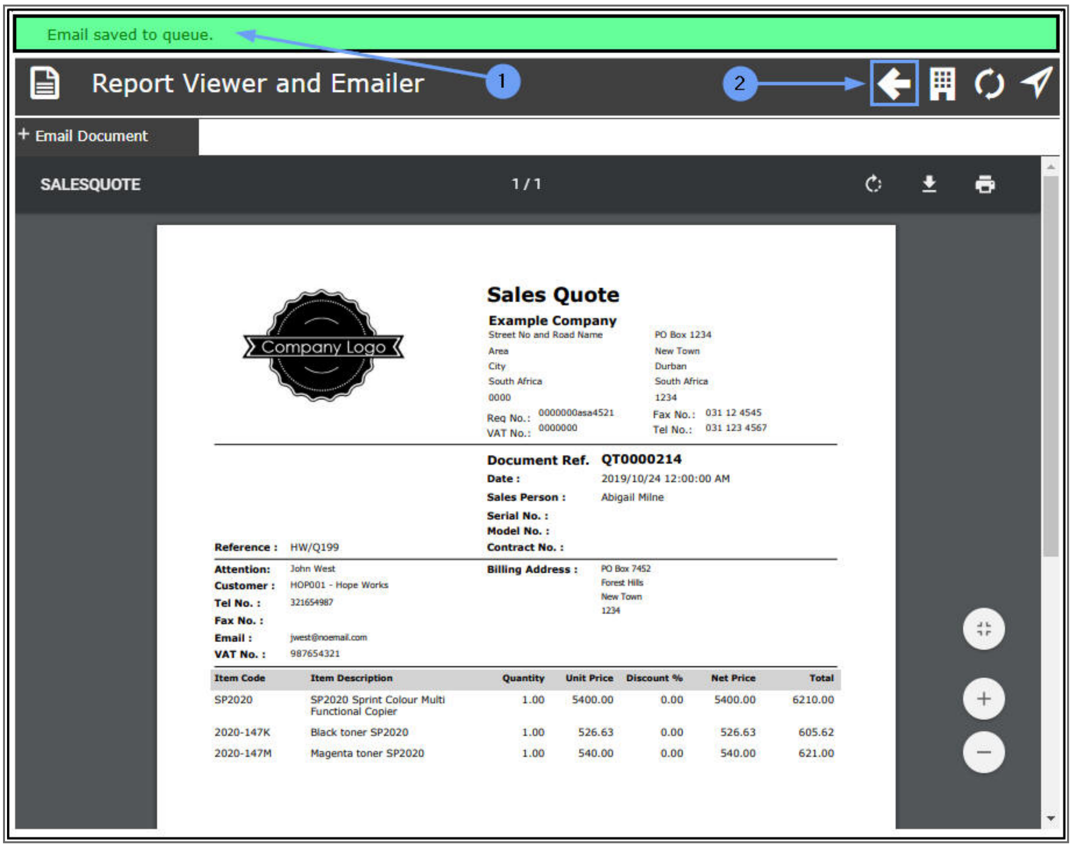
3. **Accept Quote**: If the client selects Accept - the Quote Status will be updated and a quote status notification email will be sent to the sales-man (where the Quote Status Notification email flag is set to Yes). The quote will automatically be marked as accepted in the ***Quotes*** / ***Quotes for [ ]*** screen.

4. **Reject Quote**: If the client selects Reject - the Quote Status will be updated and a quote status notification email will be sent to the salesman (where the Quote Status Notification email flag is set to Yes). The quote will automatically be marked as rejected in the ***Quotes*** / ***Quotes for [ ]*** screen.
5. **Contact Me**: If the client selects to be contacted - the Quote Status will remain unchanged. An email will be sent to the salesman requesting that they follow up with the client.
6. **Signature**: If you have a Signature configured in CRM - your Signature will pull through here, otherwise the Company default CRM mail signature will pull through.
7. Click on the ***Send*** icon.



1. A message box will pop up informing you of the status of the sent email.

2. Click on ***Back*** .



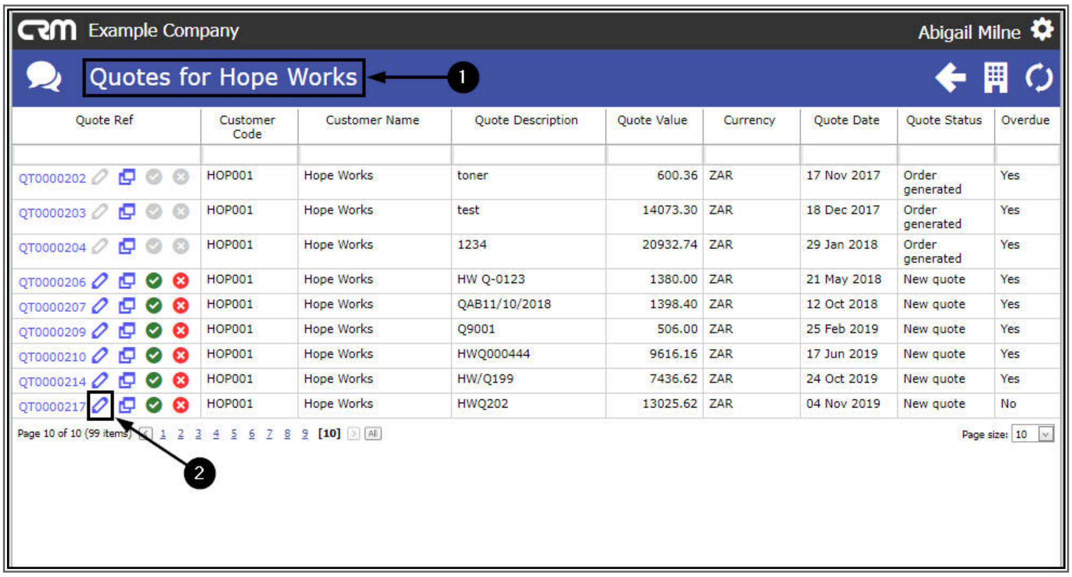
1. You will return to the ***Quotes*** listing page.

VIEW/ EDIT / DELETE QUOTE

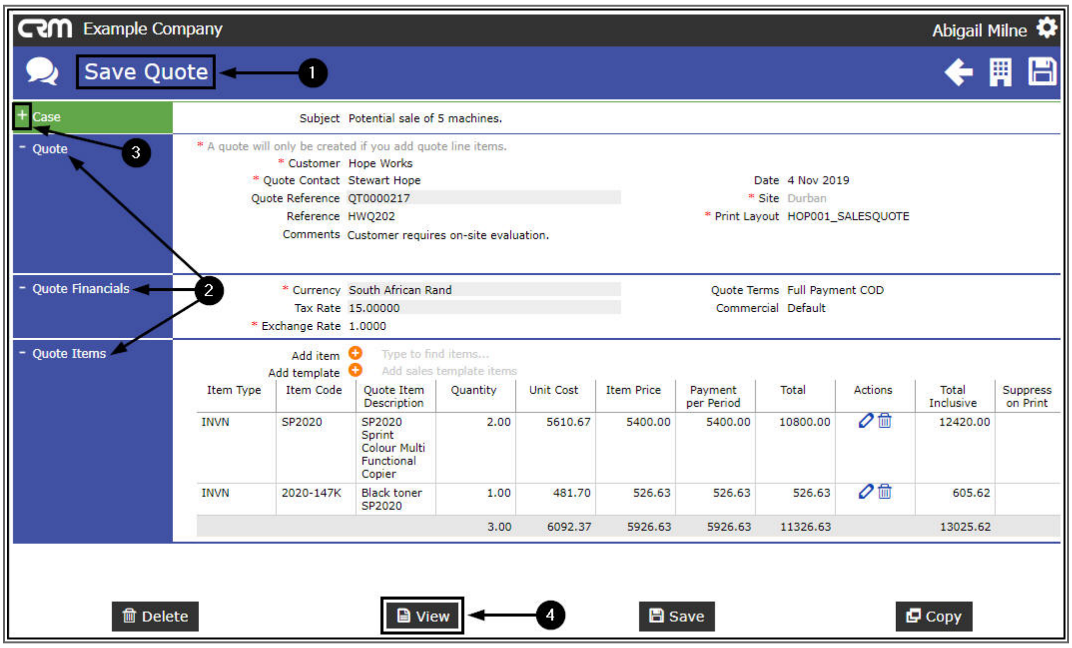
Clicking on the ***Edit*** icon takes you to the ***Save Quote*** screen, where you can; ***View***, ***Edit***, ***Delete*** or ***Copy*** the Quote.

VIEW QUOTE

2. Click on the ***Edit icon*** of the Quote that you wish to ***view***.



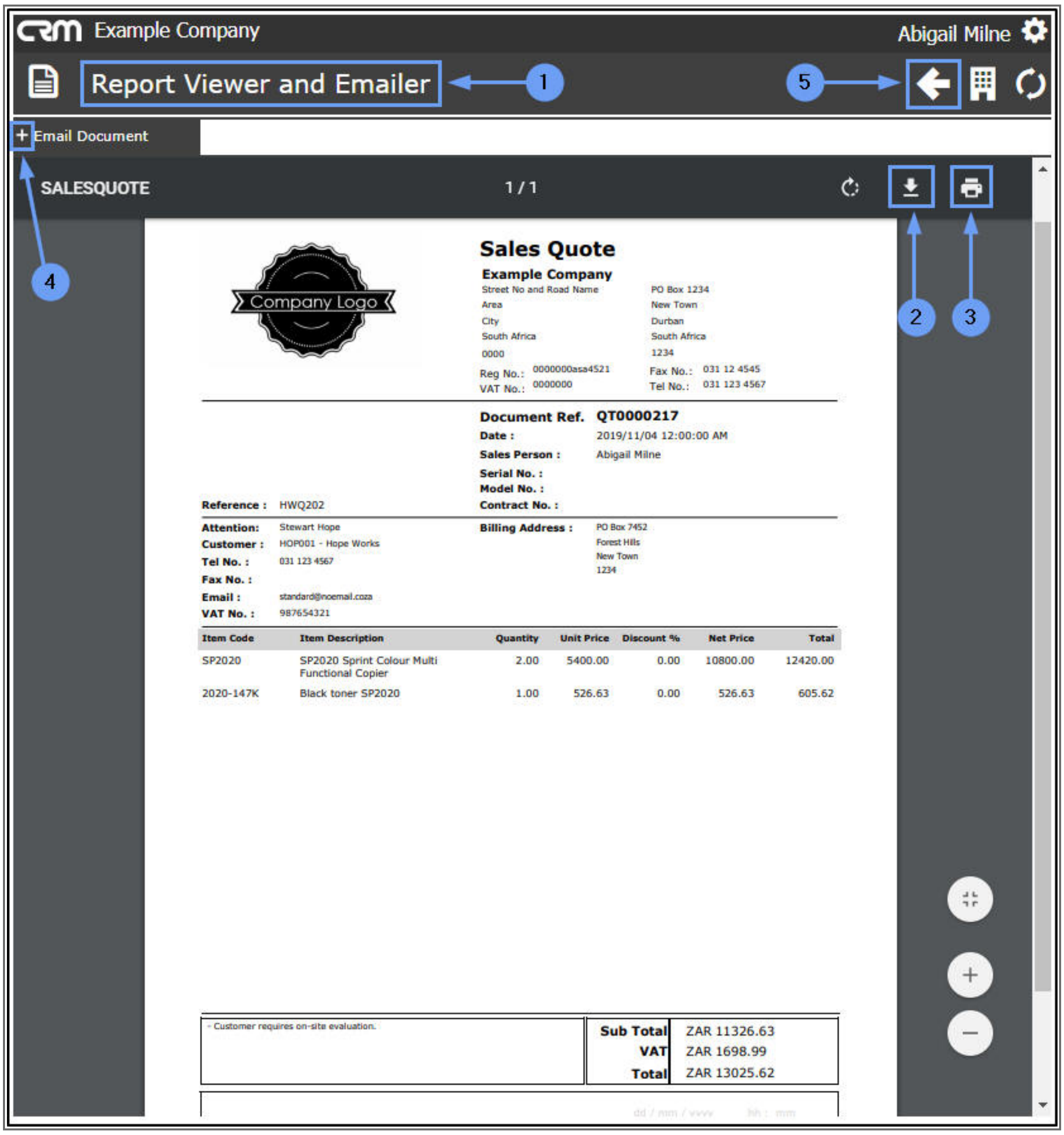
1. The ***Save Quote*** page will open.
2. The ***Quote***, ***Quote Financials*** and ***Quote Items*** frames will be auto expanded.
3. Click on the ***expand*** icon in the ***Case*** frame if you wish to view more case information.
4. Click on ***View***.



1. The ***Report Viewer and Emailer*** page will open.

   Here you can;

2. ***Download*** the Sales Quote.
3. ***Print*** the Sales Quote.
4. Email the Sales Quote.
5. Click on ***Back*** to return to the previous page.



EDIT QUOTE

You can edit some of the details in this ***Save Quote*** page.

EDIT THE CASE FRAME

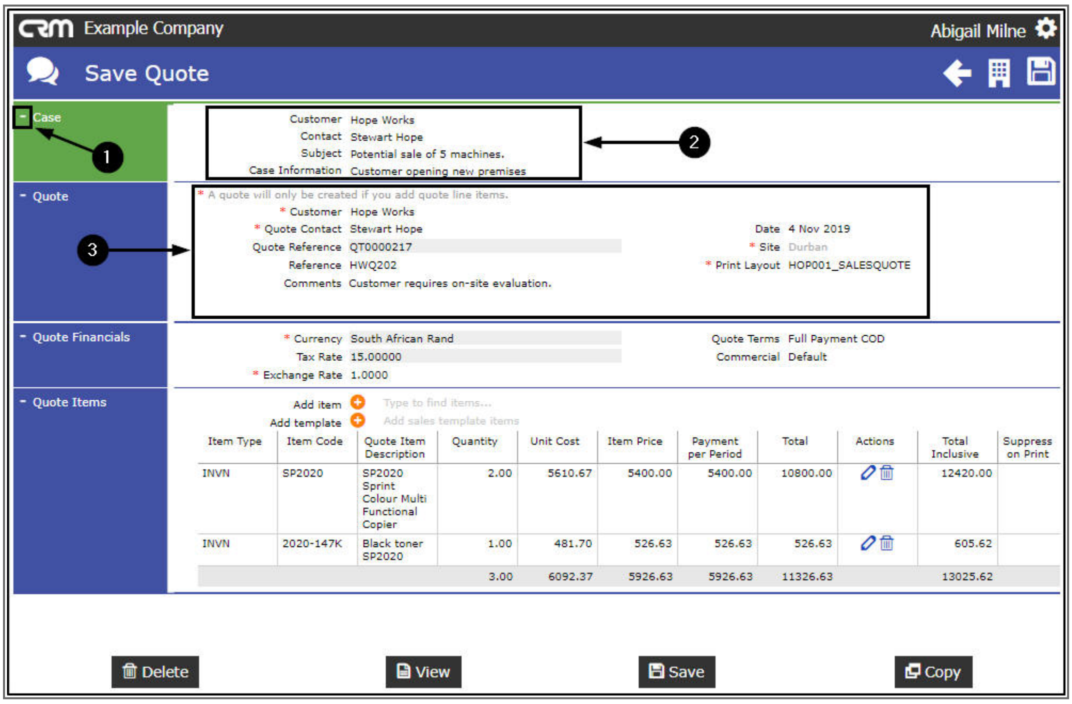
1. ***Expand*** the Case frame to view all the information.
2. None of the details in this frame can be edited.

EDIT THE QUOTE FRAME

3. Some of the details in the ***Quotes*** frame can be edited:

- **Customer**: This will auto populate. This field cannot be edited.
- **Quote Contact**: This will auto populate.
  - You can click on the **drop-down arrow** and select from the list, an alternative contact, if required.
- **Quote Reference**: This will auto populate with the quote number. This field cannot be edited.
- **Reference**: This will auto populate but you can edit this, if required.
- **Comments**: This will auto populate but you can add to or edit the text, if required.
- **Date**: This will auto populate.
  - You can click on the ***drop-down arrow*** and select from the list, an alternative date, if required.
- **Site**: This will auto populate. This field cannot be edited.
- **Print Layout**: This will auto populate.

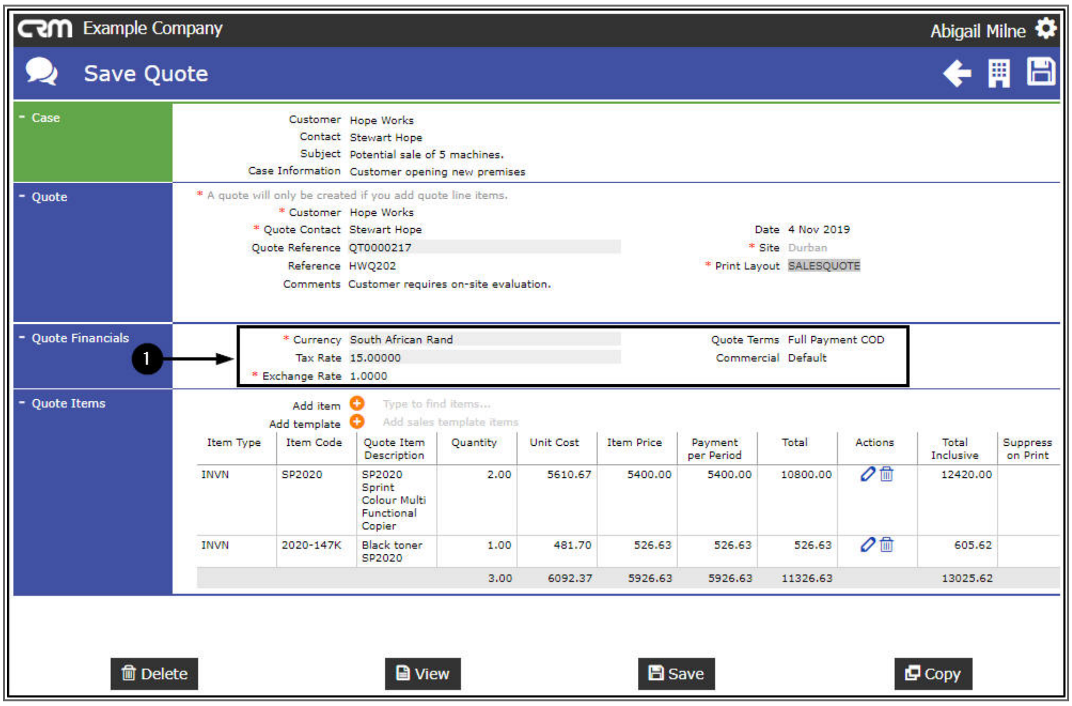
- You can click on the ***drop-down arrow*** and select from the list, an alternative lay-out, if required and if there are alternatives set up on your CRM.



EDIT THE QUOTE FINANCIALS FRAME

1. Some of the details in the ***Quote Financials*** frame can be edited:
   - **Currency:** This will auto populate. This field cannot be edited.
   - **Tax Rate:** This will auto populate. This field cannot be edited.
   - **Exchange Rate:** This will auto populate.
     - You can delete the current exchange rate and type in the new exchange rate, if required.

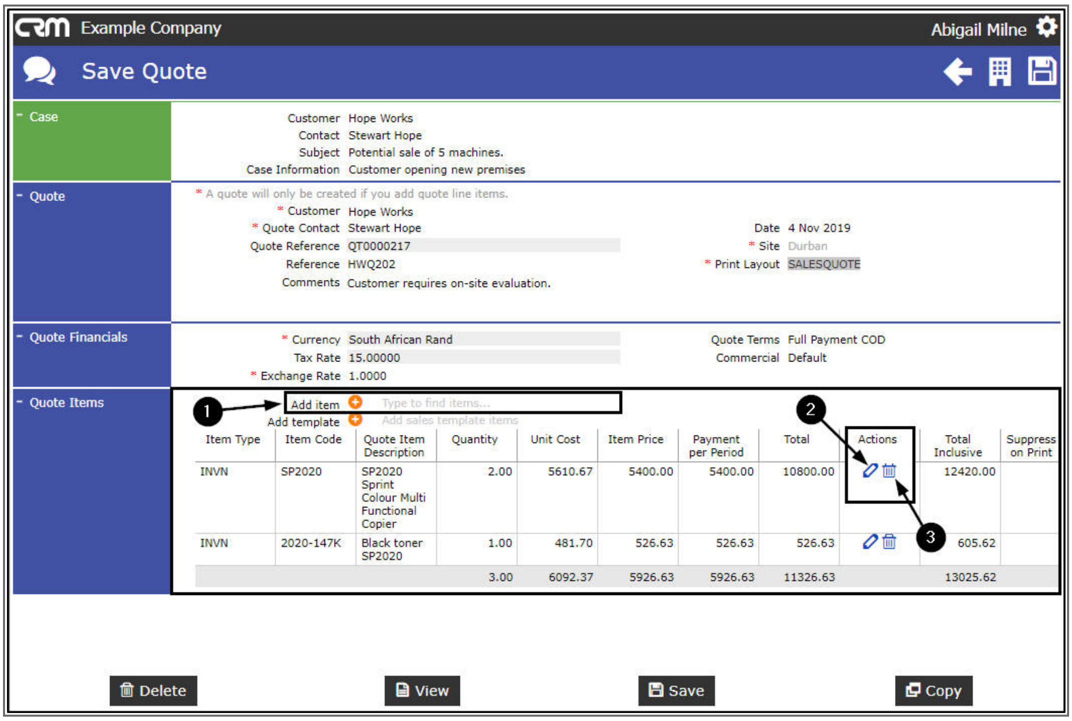
- **Quote Terms:** This will auto populate.
  - You can click on the **drop-down arrow** and select alternative payment terms, if required.
- **Commercial:** This will auto populate.
  - You can click on the **drop-down arrow** and select an alternative commercial, required.



EDIT THE QUOTE ITEMS FRAME

Some of the details in the ***Quote Financials*** frame can be edited:

1. You can add more Quote items, if required.
2. You can edit the existing Quote items, if required.
3. You can delete the existing Quote items, if required.



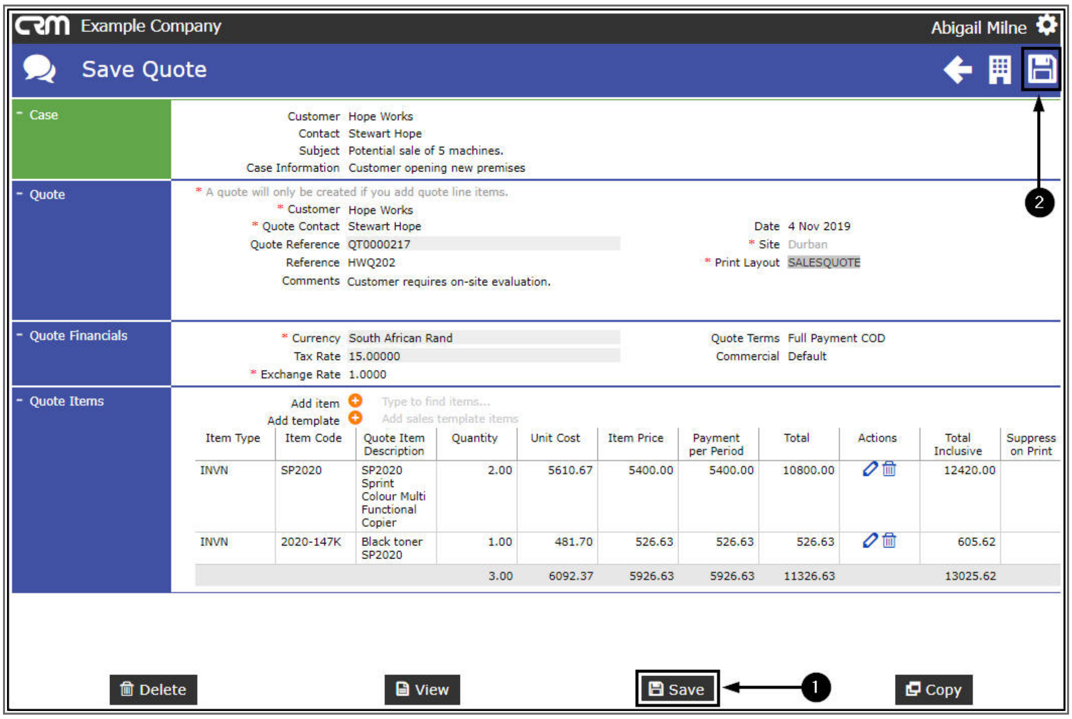
SAVE QUOTE CHANGES

When you have finished editing the Quote details, either click on the

1. ***Save*** button

   Or the

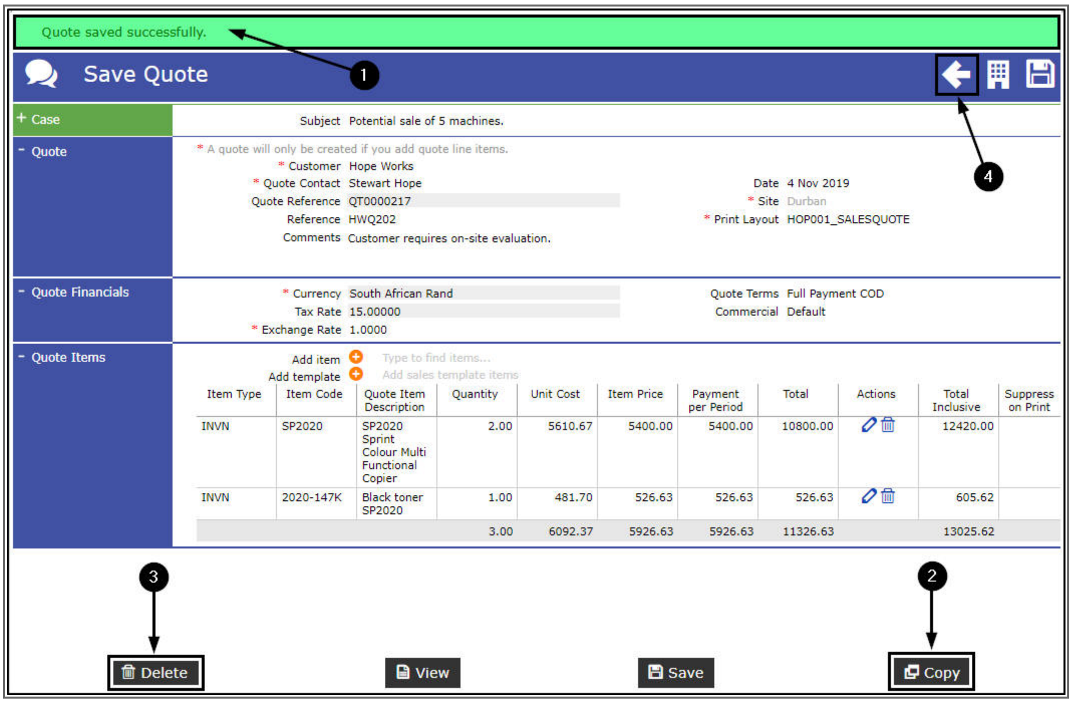
2. ***Save*** icon to keep your changes.



1. A message will pop up informing you that;
    - ***Quote saved successfully.***

In this ***Save Quote*** page, you can also select to

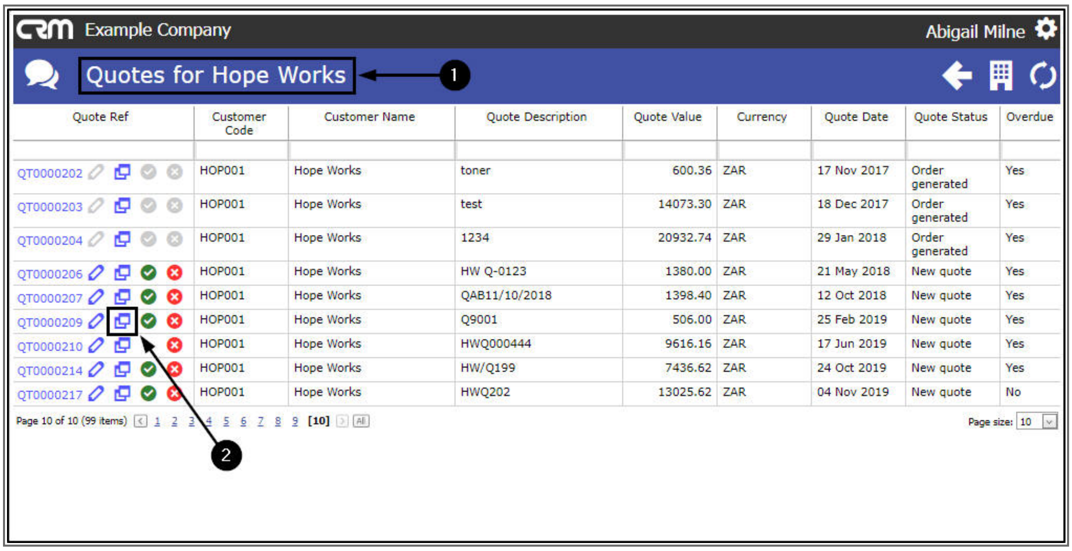
2. Copy (Clone) this Quote or
3. Delete this Quote.
4. Click on ***Back*** to return to the previous page.



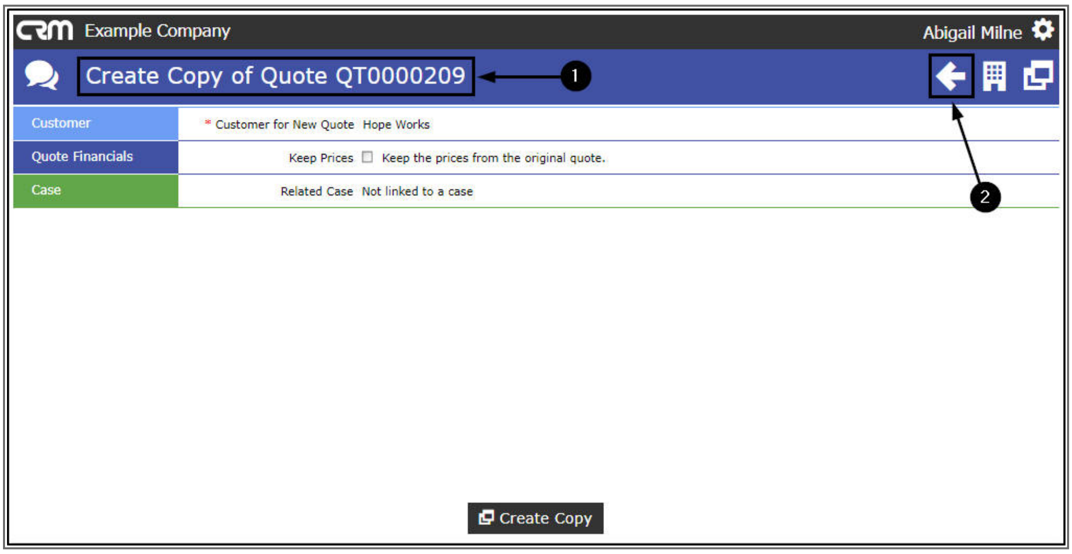
CREATE COPY (CLONE) OF QUOTE

(from the ***Quotes for** [selected customer]* page)

1. In the ***Quotes for** [selected customer]* page,
2. Click on the ***Create Copy of Quote*** icon next to the Quote that is to be copied.

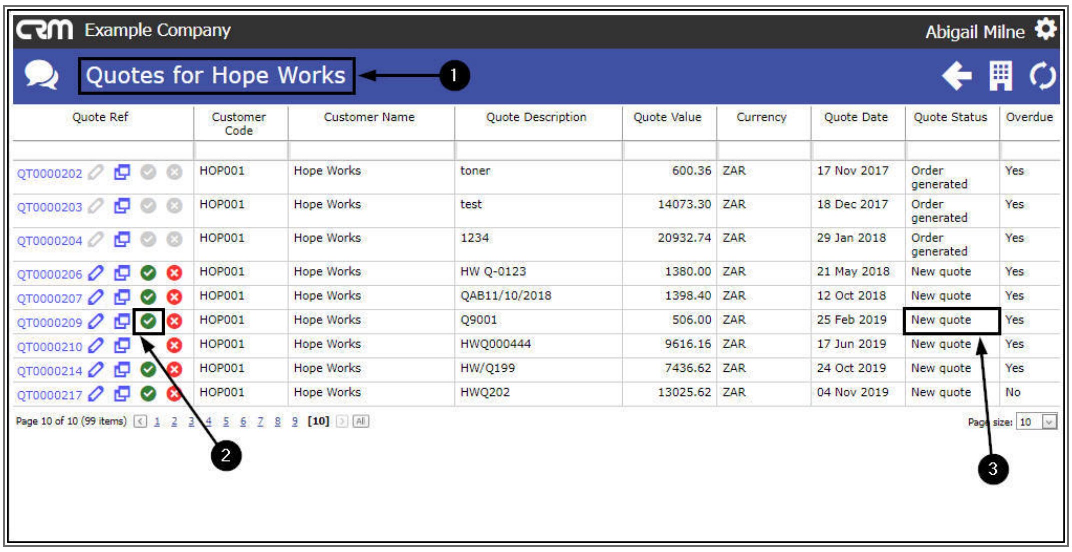


1. The ***Create Copy of Quote** [selected quote number]* page will open.
   - Follow the process to copy (clone) this quote, if required.
2. Or click on ***Back*** to return to the ***Quotes for** [selected customer]* page.



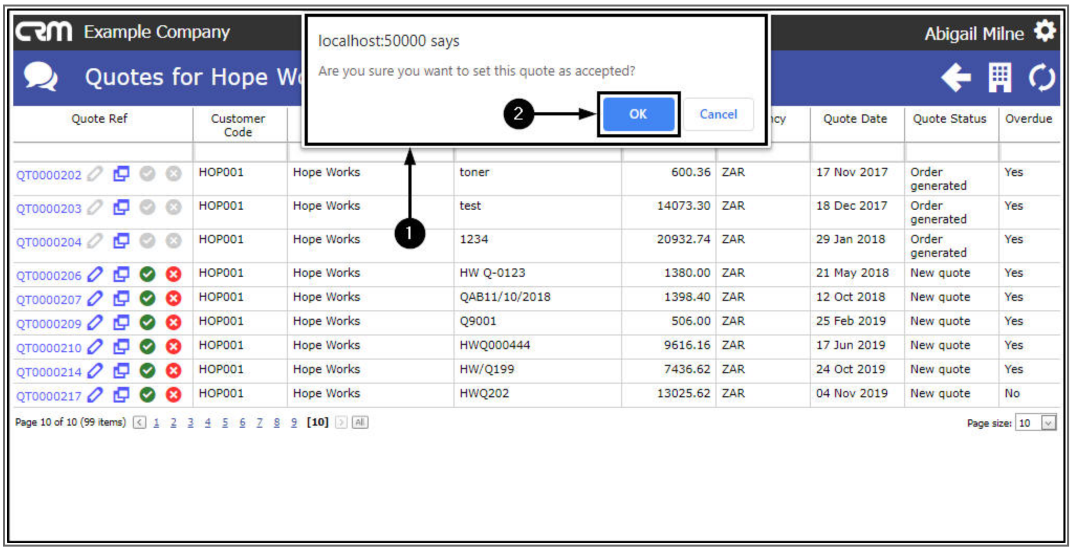
MARK QUOTE AS ACCEPTED

1. In the ***Quotes for [****selected customer****]*** page,
2. Click on the ***Mark as Accepted*** icon next to the Quote that is to be accepted.
3. You will note that the ***Quote Status*** is currently ' ***New Quote***'.

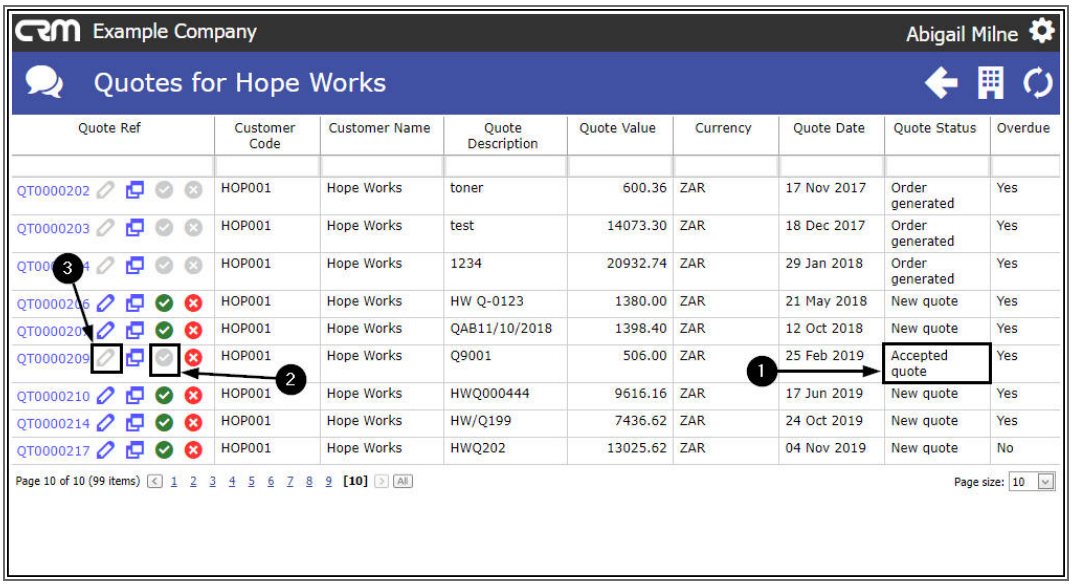


Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000202	HOP001	Hope Works	toner	600.36	ZAR	17 Nov 2017	Order generated	Yes
QT0000203	HOP001	Hope Works	test	14073.30	ZAR	18 Dec 2017	Order generated	Yes
QT0000204	HOP001	Hope Works	1234	20932.74	ZAR	29 Jan 2018	Order generated	Yes
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	New quote	Yes
QT0000210	HOP001	Hope Works	HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000214	HOP001	Hope Works	HW/Q199	7436.62	ZAR	24 Oct 2019	New quote	Yes
QT0000217	HOP001	Hope Works	HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

1. A message box will pop up asking;
   - ***Are you sure you want to set this quote as accepted?***
2. Click on ***Ok*** .

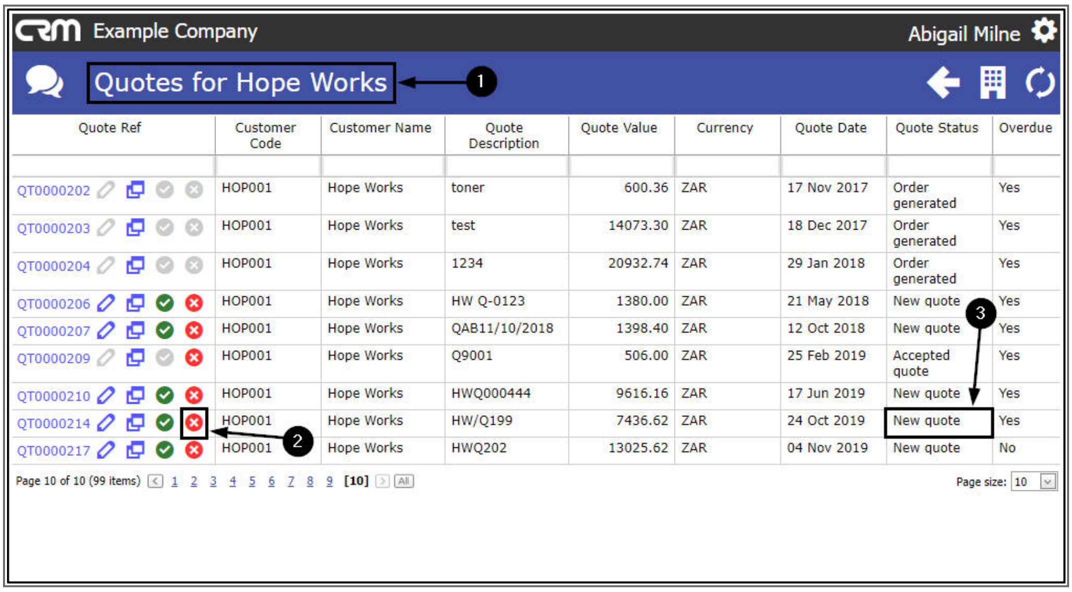


1. The ***Quote Status*** will change to '***Accepted Quote***'.
2. The ***Mark as Accepted*** icon will become inactive (greyed out).
3. The ***Edit*** icon will become inactive (greyed out) as 'Accepted' quotes <u>cannot</u> be edited.

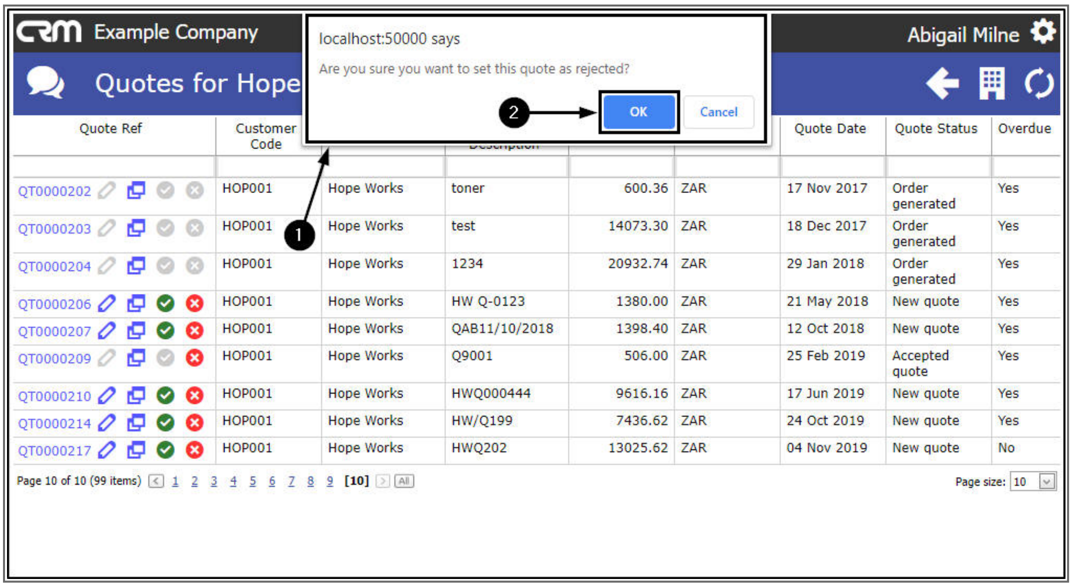


MARK QUOTE AS REJECTED

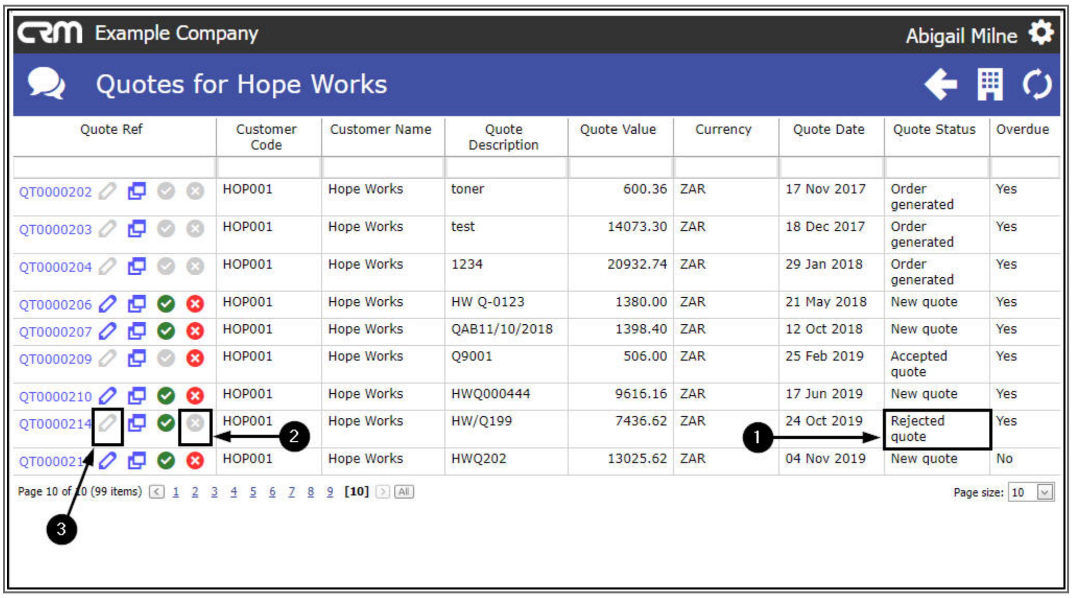
1. In the ***Quotes for [****selected customer****]*** page,
2. Click on the ***Mark as Rejected*** icon next to the Quote that is to be rejected.
3. You will note that the ***Quote Status*** is currently ' ***New Quote***'.



1. A message box will pop up asking;
    - ***Are you sure you want to set this quote as rejected?***
2. Click on ***Ok*** .



1. The ***Quote Status*** will change to '***Rejected Quote***'.
2. The ***Mark as Rejected*** icon will become inactive (greyed out).
3. The ***Edit*** icon will become inactive (greyed out) as 'Rejected' quotes can-not be edited.

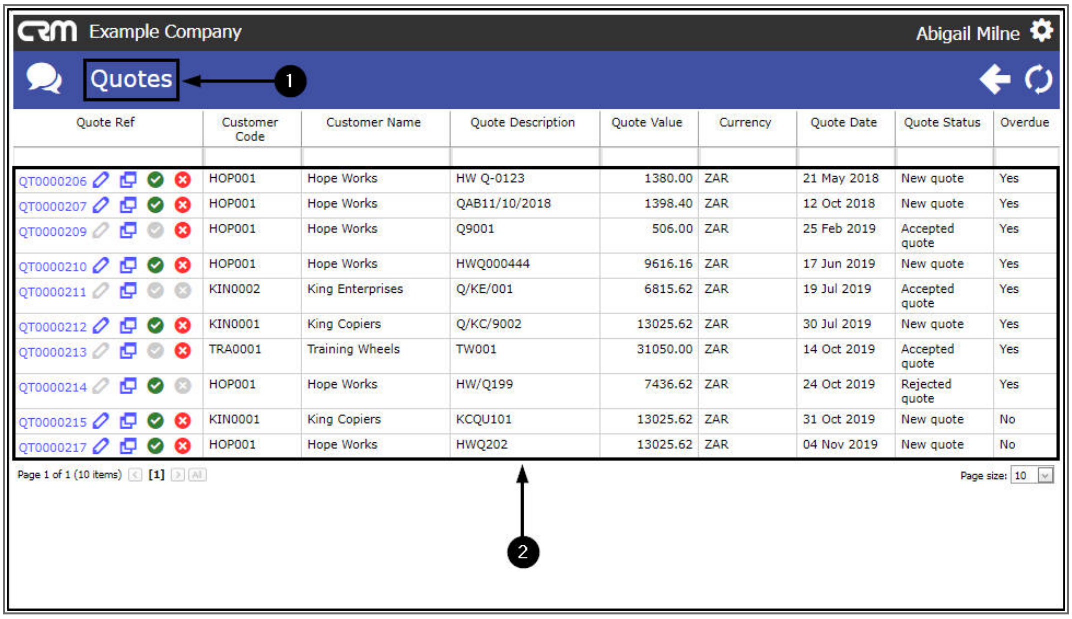


ACCESS THE FULL LIST OF QUOTES FROM THE DASHBOARD (HOME PAGE)

To access the full list of all the quotes linked to you as a Salesman, you must navigate from the Dashboard.

1. In the ***Dashboard*** (Home page),
2. Click on the ***Quotes*** tile.
3. The number in the top right of this tile shows the ***total*** number of New, Accepted or Rejected Quotes (for all customers) that are linked to you as the Salesman.

- The ***Quotes*** listing page will open.
- A list of New, Accepted or Rejected Quotes for all customers on the system, where you are the Salesman, will be displayed.
- For more information refer to CRM Basics: Quotes.



Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	Accepted quote	Yes
QT0000210	HOP001	Hope Works	HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000211	KIN0002	King Enterprises	Q/KE/001	6815.62	ZAR	19 Jul 2019	Accepted quote	Yes
QT0000212	KIN0001	King Copiers	Q/KC/9002	13025.62	ZAR	30 Jul 2019	New quote	Yes
QT0000213	TRA0001	Training Wheels	TW001	31050.00	ZAR	14 Oct 2019	Accepted quote	Yes
QT0000214	HOP001	Hope Works	HW/Q199	7436.62	ZAR	24 Oct 2019	Rejected quote	Yes
QT0000215	KIN0001	King Copiers	KCQU101	13025.62	ZAR	31 Oct 2019	New quote	No
QT0000217	HOP001	Hope Works	HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

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