CRM BASICS

VIEW / PRINT / EMAIL A QUOTE

A full list of Quotes can be accessed from the Dashboard (Home page), or customer-specific Quotes can be accessed from the Customer Dashboard (Customer Home page).

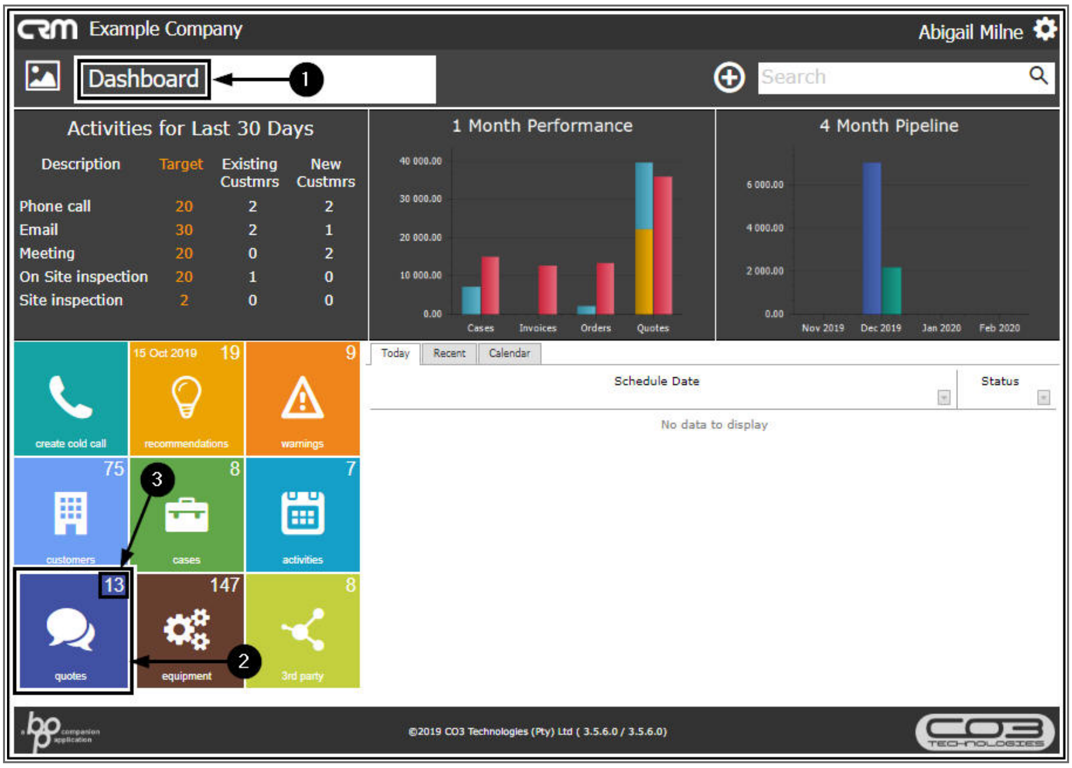
Quotes in either of these pages can be: Viewed, Downloaded, Printed and Emailed.

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

LIST OF ALL QUOTES

(linked to you as the Salesman) from the Dashboard

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

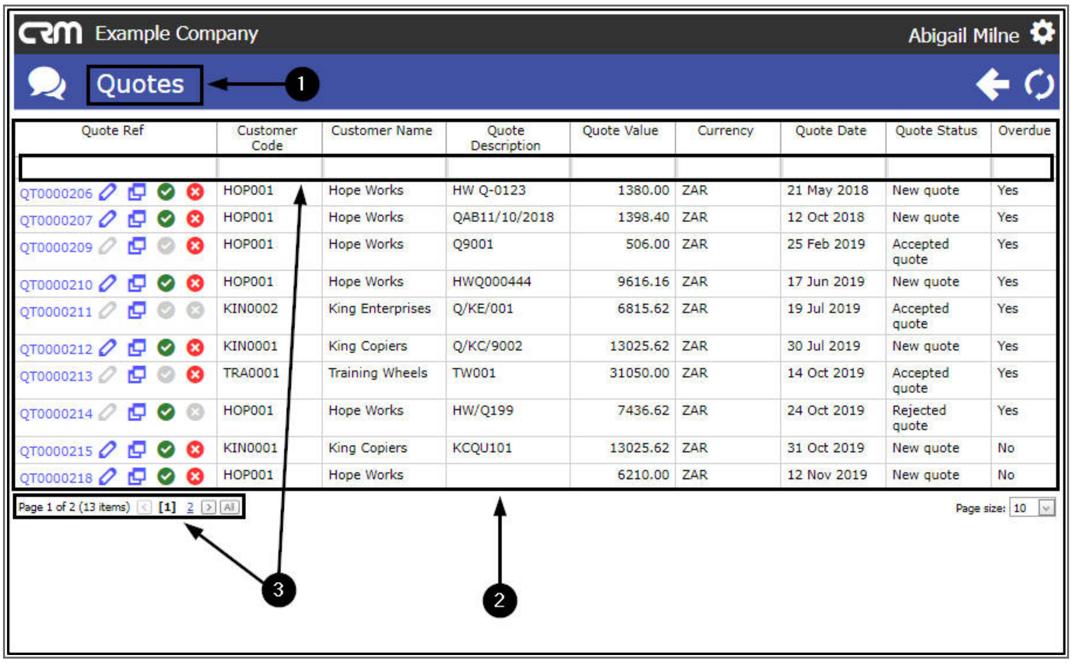


1. The ***Quotes*** listing page will open.
2. A list of ***New*** , ***Accepted*** and ***Rejected*** quotes for all customers on the system, where you are the Salesman, will be displayed.
3. Use the Page Reference field, or the Filter Row to search for a particular quote.

Follow the process to

- View,
- Download,
- Print or
- Email

the selected Quote, as required.

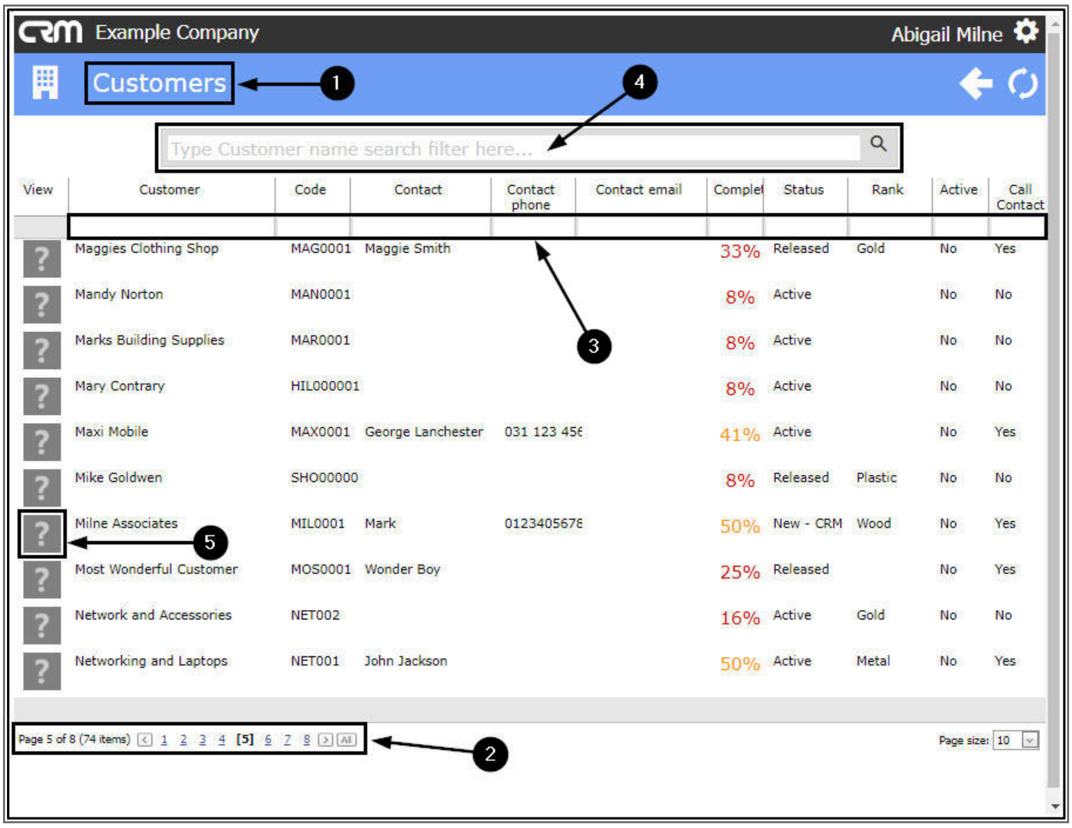


Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	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
QT0000218	HOP001	Hope Works		6210.00	ZAR	12 Nov 2019	New quote	No

CUSTOMER SPECIFIC QUOTES

1. In the ***Dashboard,***
2. Click on the ***Customers*** tile.
3. The number in the top right of this tile shows the total number of ***Customers***, on the System.

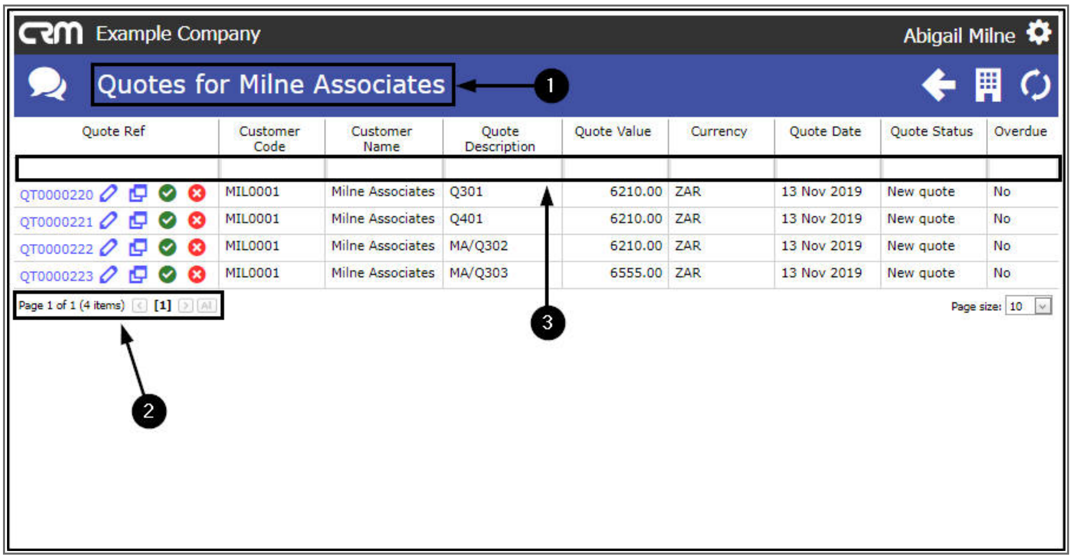
1. The ***Customers*** listing page will open.
2. You can use the Page Reference field,
3. the Filter Row or
4. the Filter Text Box to ***search*** for your customer.
5. Click on the selected ***Customer icon*** in the ***View*** column.



1. The ***Customer Dashboard*** (Customer Home page) 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.

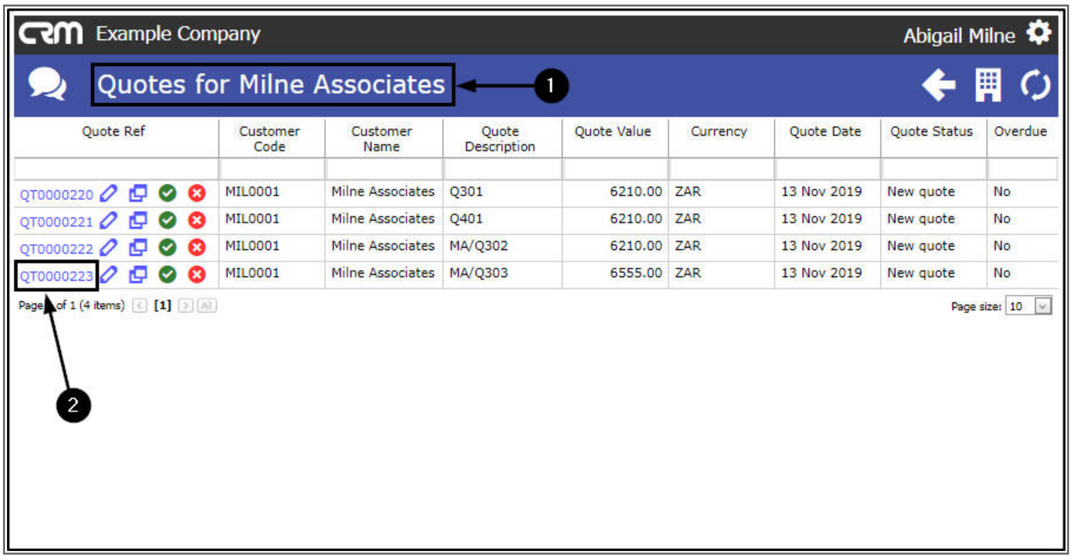
Follow the process to View, Download, Print or Email the selected Quote, as required.



VIEW A QUOTE

In either the Quotes listing page or the Quotes for [selected customer] page you can search for and View, Download, Print or Email a selected Quote. For the purpose of this manual, we will start from the Quotes for [selected customer] page.

1. In the ***Quotes for [selected customer]*** page,
2. Click on the blue ***number*** of the Quote that you wish to ***View***, ***Download***, ***Print*** or ***Email*** .



1. The ***Report Viewer and Emailer*** page will open.
    - The selected quote will be displayed in Report format.
2. You can **download** and/or
3. ***Print*** the Sales Quote, if required.

EMAIL QUOTE

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

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

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

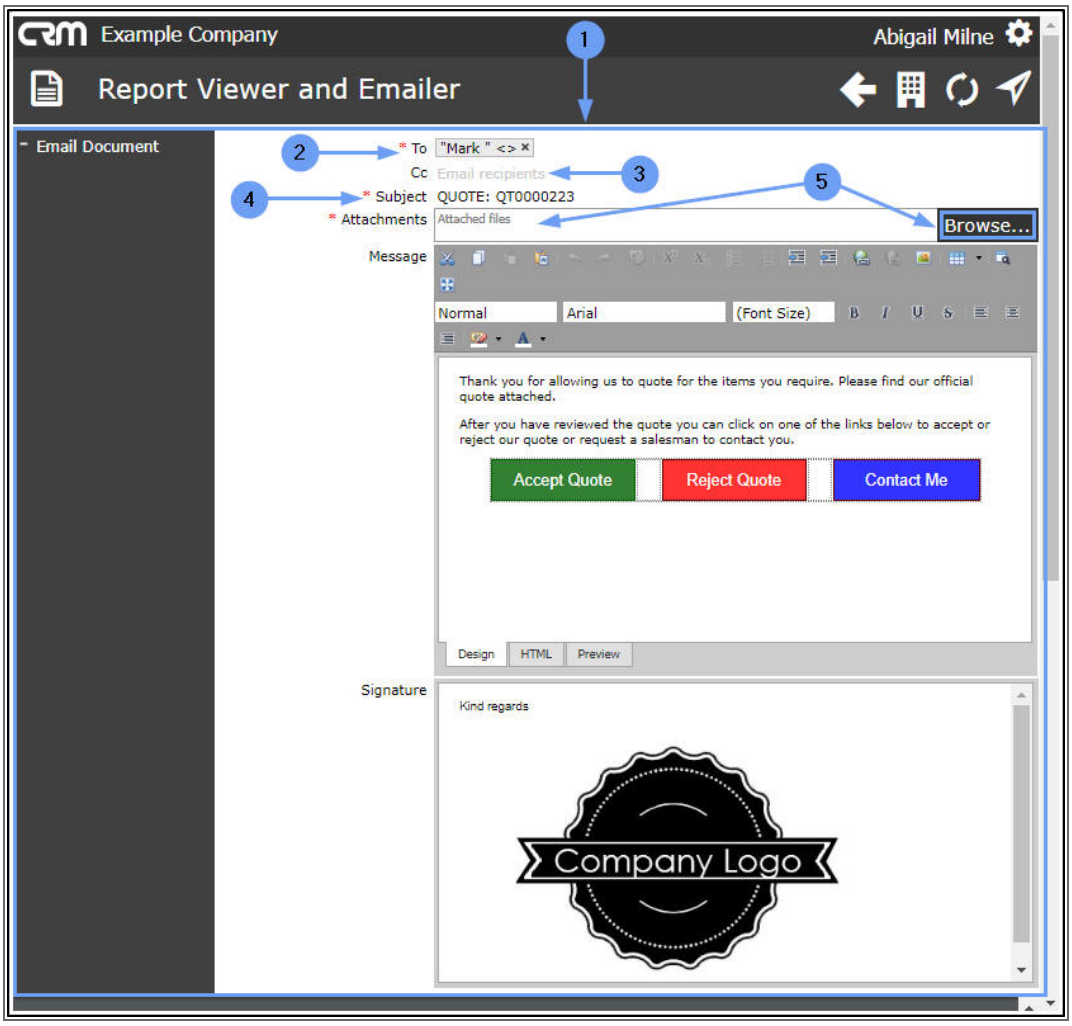
2. **To:** This will auto populate with the CRM contact for the quote (case) but you can change this, if required.
3. **Cc:** Here, you can add other email recipients, if applicable.
   - Either click in the field and select customer contacts from the list, or type in additional addresses as noted above (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.

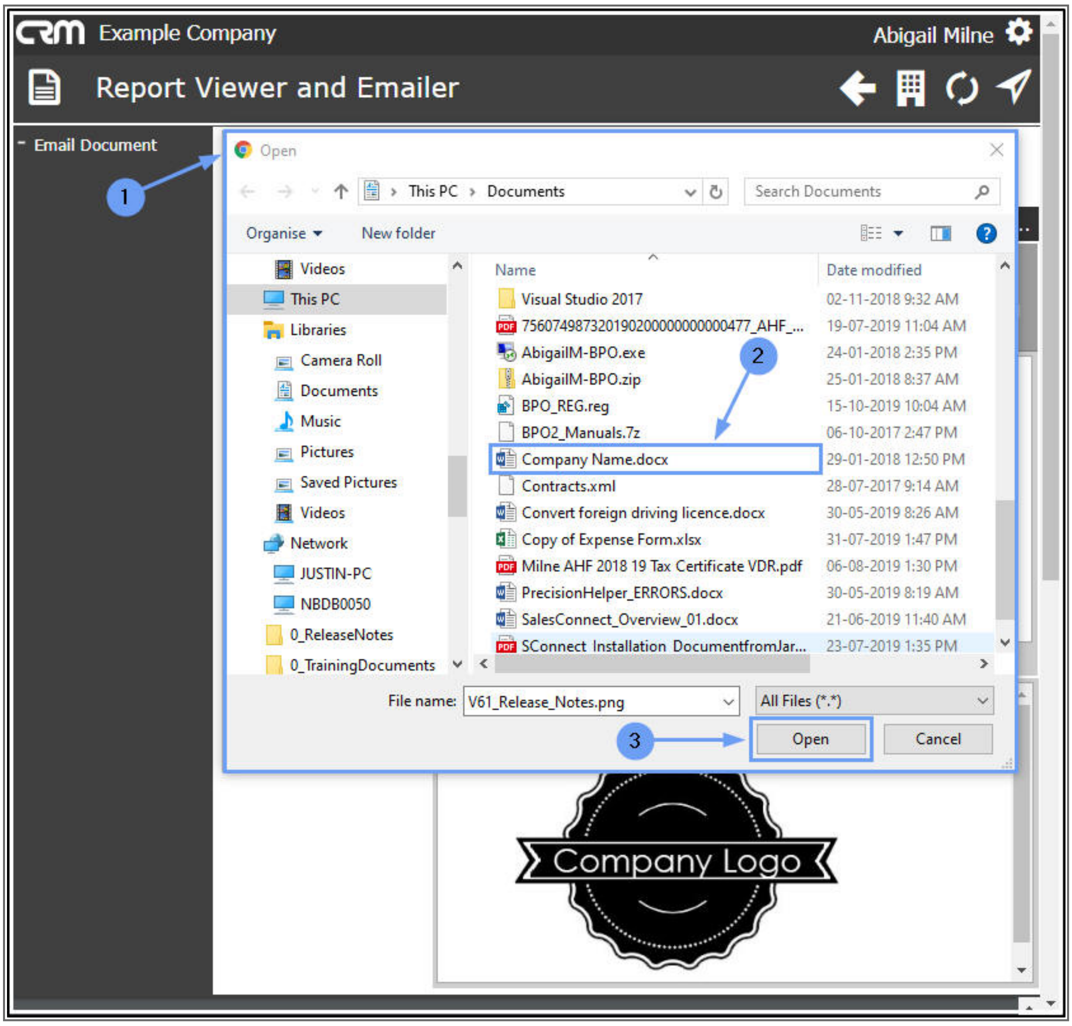
ADD AN ATTACHMENT TO THE QUOTE

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

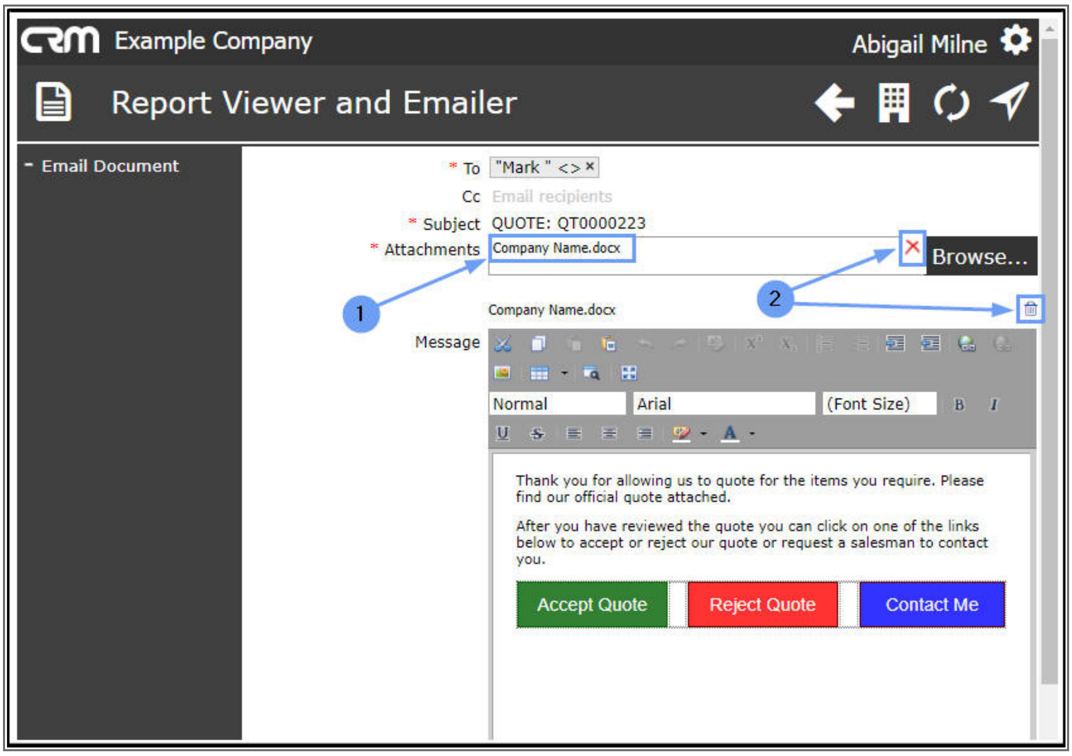
5. **Attachments:** Click on ***Browse***.



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 <u>either</u> 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.

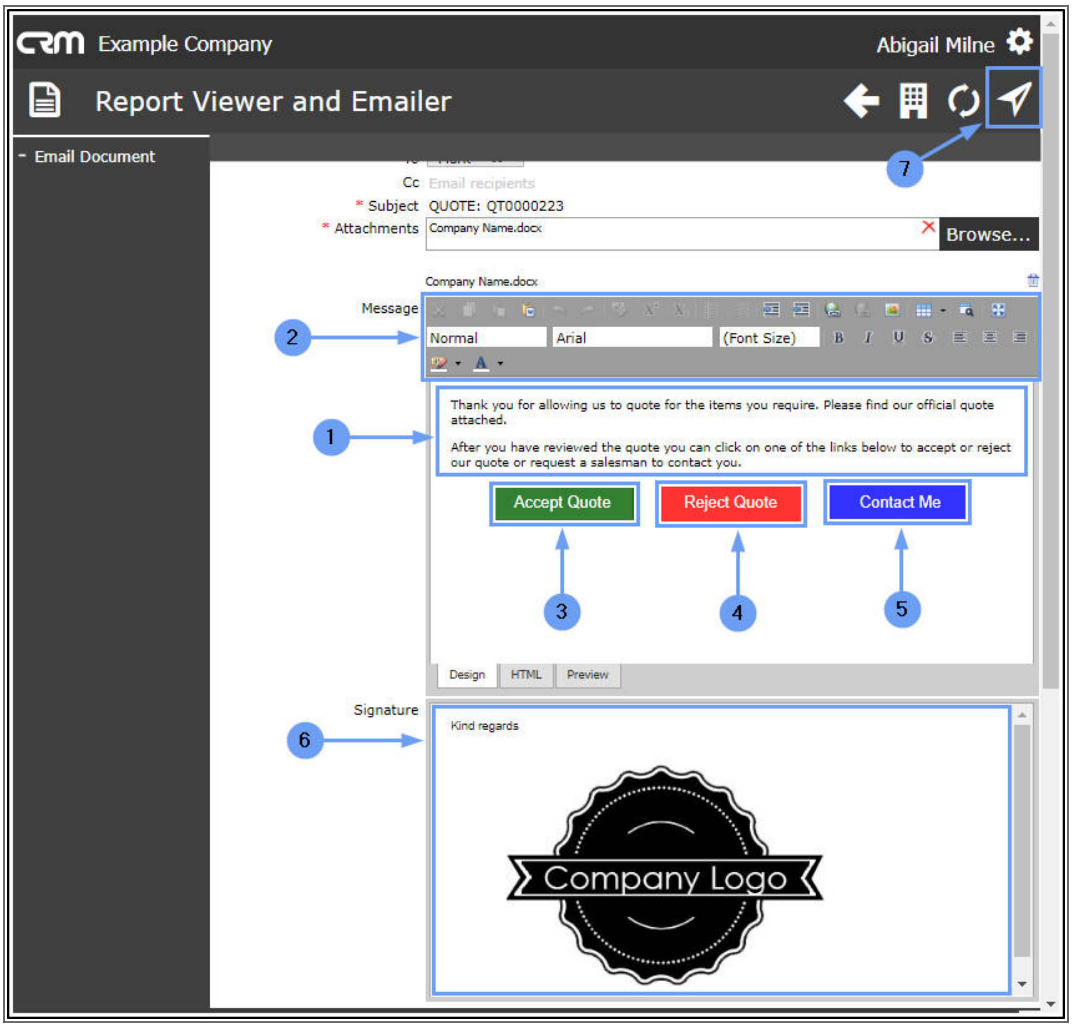
EMAIL ACTION BUTTONS

The message body contains **3Action** 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

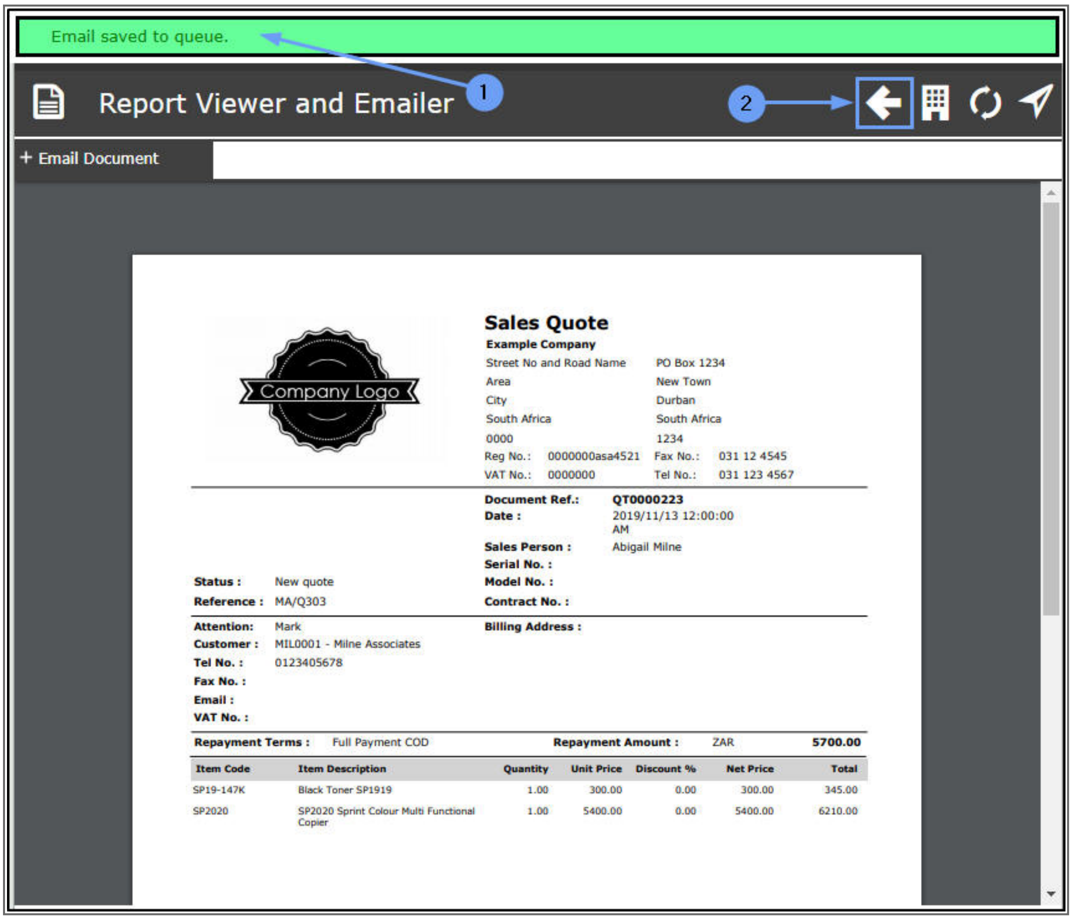
salesman (where the Quote Status Notification email flag is set to Yes). The quote will automatically be marked as rejected in the ***Quotes*** / ***Quotes for [ ]*** screen.

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 he/she 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.

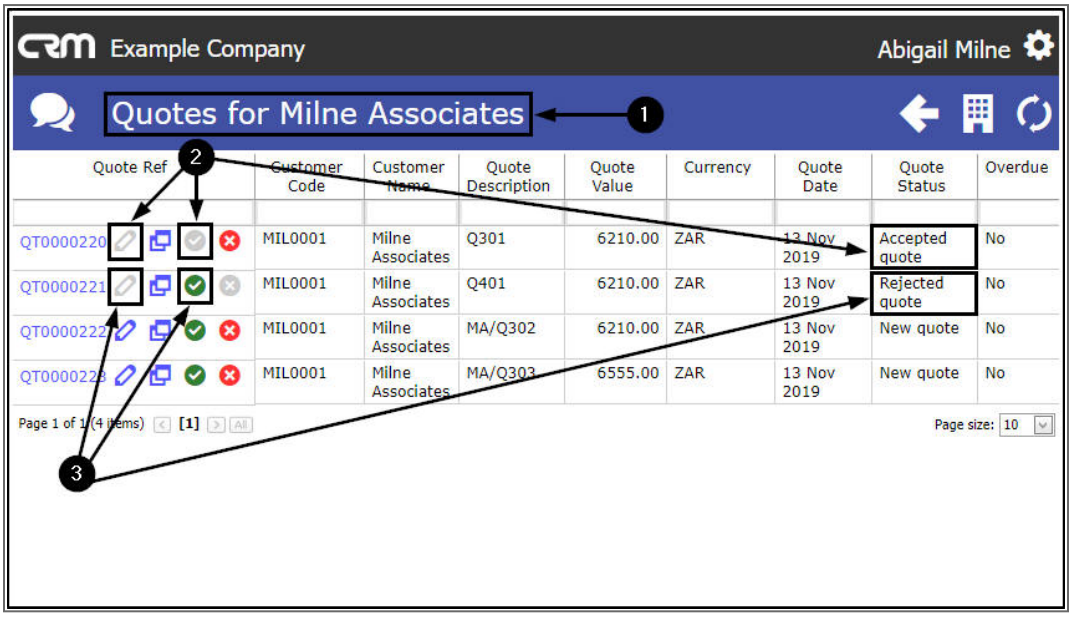


1. A message box will pop up informing you of the status of the sent email.

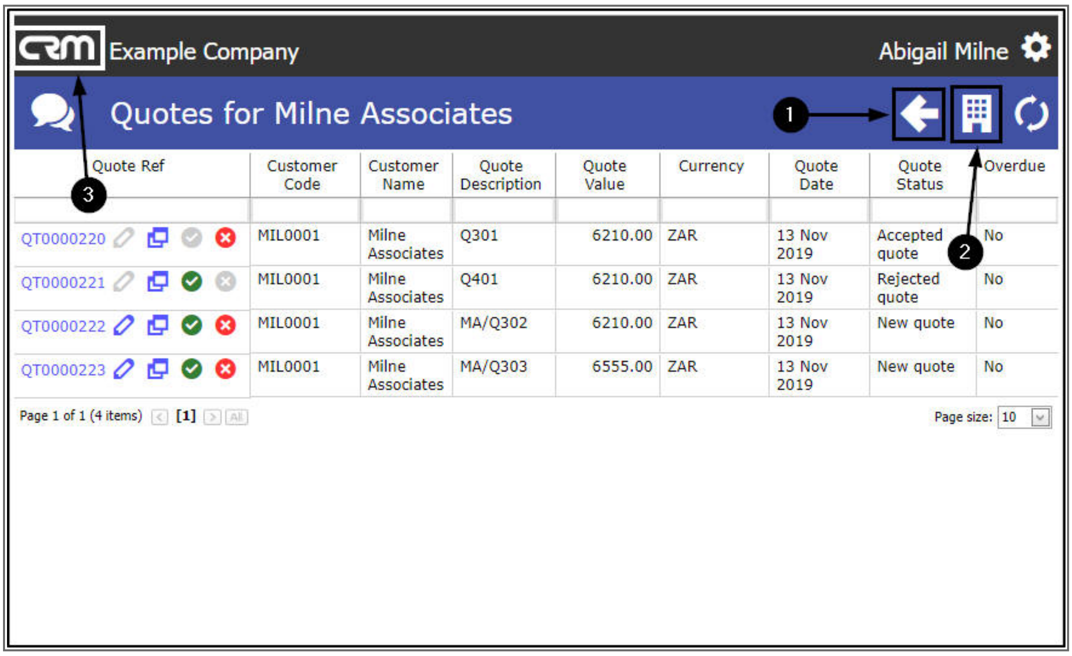
2. Click on ***Back*** .



1. You will return to the ***Quotes for [*****selected customer*****]*** listing page.
2. If, on receipt of your email, your customer selected to ***Accept the Quote***, then the ***Edit*** icon and the ***Mark as Accepted*** icon will now be Inactive (greyed out) and the Quote Status will have changed to ***Accepted Quote***.
3. If, on receipt of your email, your customer selected to ***Reject the Quote***, then the ***Edit*** icon and the ***Mark as Rejected*** icon will now be Inactive (greyed out) and the Quote Status will have changed to ***Rejected Quote***.



1. Click on ***Back*** to return to the previous page or
2. Click on the ***Customers*** icon to return to the ***Customer Dashboard*** or
3. Click on the ***CRM logo*** to return to the ***Dashboard*** (Home page).



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