SALES STUDIO QUOTES

ADD COMMENTS

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 set out below to *add Comments* to a quote in 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
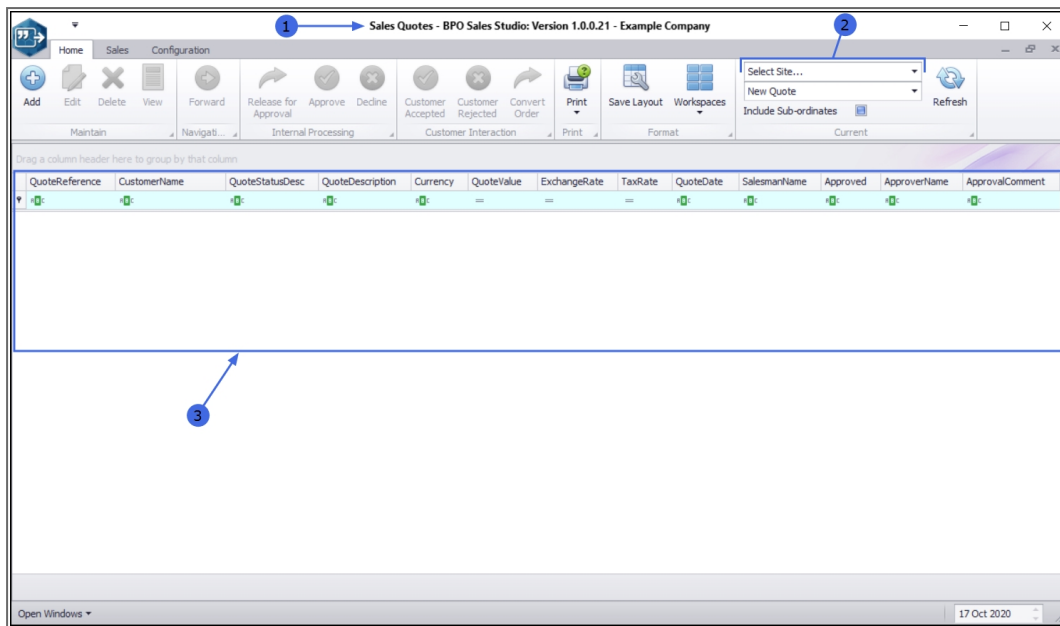

Ribbon Access: *Sales Studio > Sales > Quotes*

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.

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 link **Comments** to.

Note 1: If you are **creating a new quote**, you do <u>not</u> need to select the **Status**. If you are adding Comments to a **current** quote then you <u>will</u> need to select the Status.

Note 2: Only quotes in Status: '**New Quote**' or '**Salesman Released Quote**' can have Comments added to them.

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 [Using BPO Data Grids](#) and [Data Grid Filtering](#) for further information regarding data grid functionality that can be utilised here.

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