

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

CRM BASICS

QUOTE PRODUCT CONFIGURATION

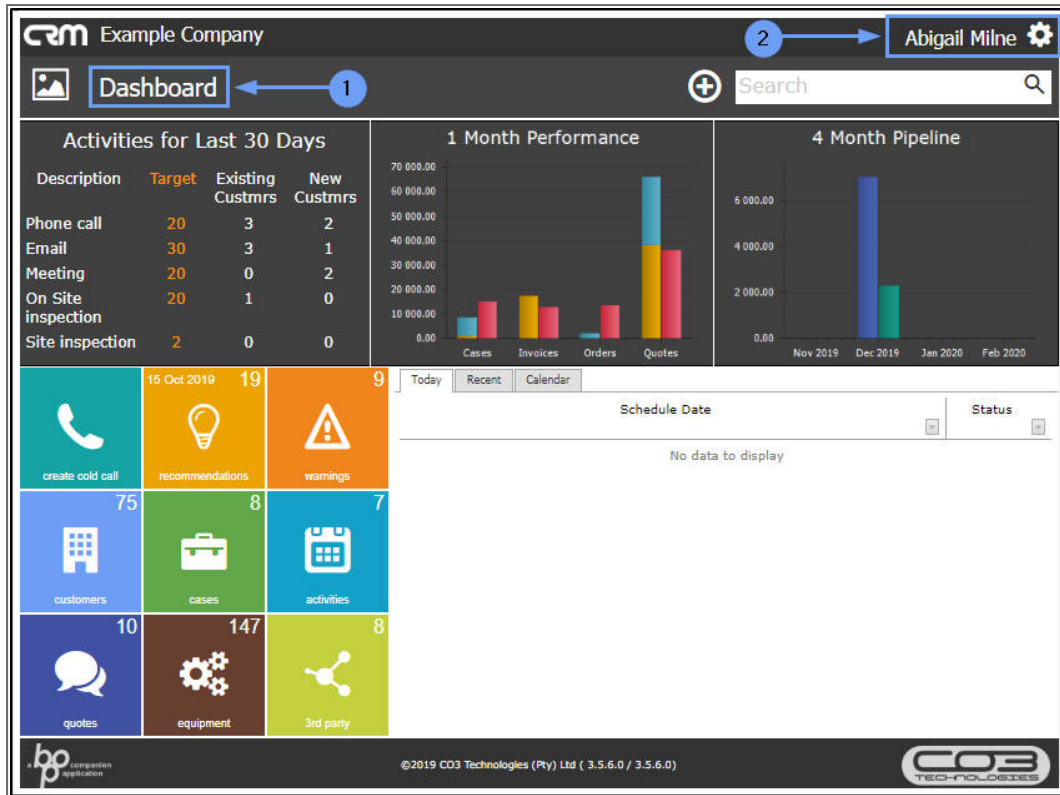
You need to configure Quote **products** in order to be able to select them as single line items on a Quote.

Product **images** can be linked to the items - which can pull through on customised Quote templates.

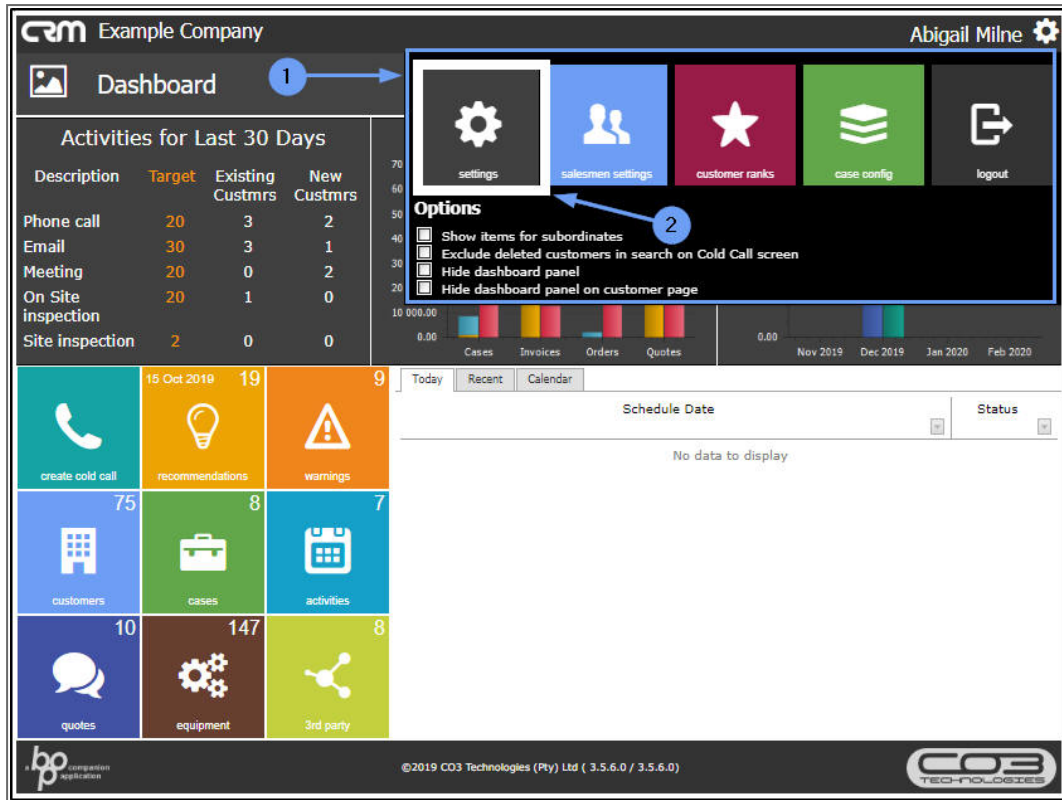
Ribbon Access: Webpage > [http://\[servername\]:\[port-no\]/BPOCRM/User.aspx](http://[servername]:[port-no]/BPOCRM/User.aspx)

NAVIGATE TO QUOTE PRODUCTS

1. In the **Dashboard** (Home page),
2. Hover over the **User Name** or **Settings** icon.



1. The **Settings Options** frame will be displayed.
2. Click on **Settings**.



The screenshot shows the CRM Example Company dashboard for user Abigail Milne. The dashboard includes a 'Dashboard' tab, a table of 'Activities for Last 30 Days', a grid of activity tiles, and a settings menu. The settings menu is highlighted with a blue box and contains the following options:

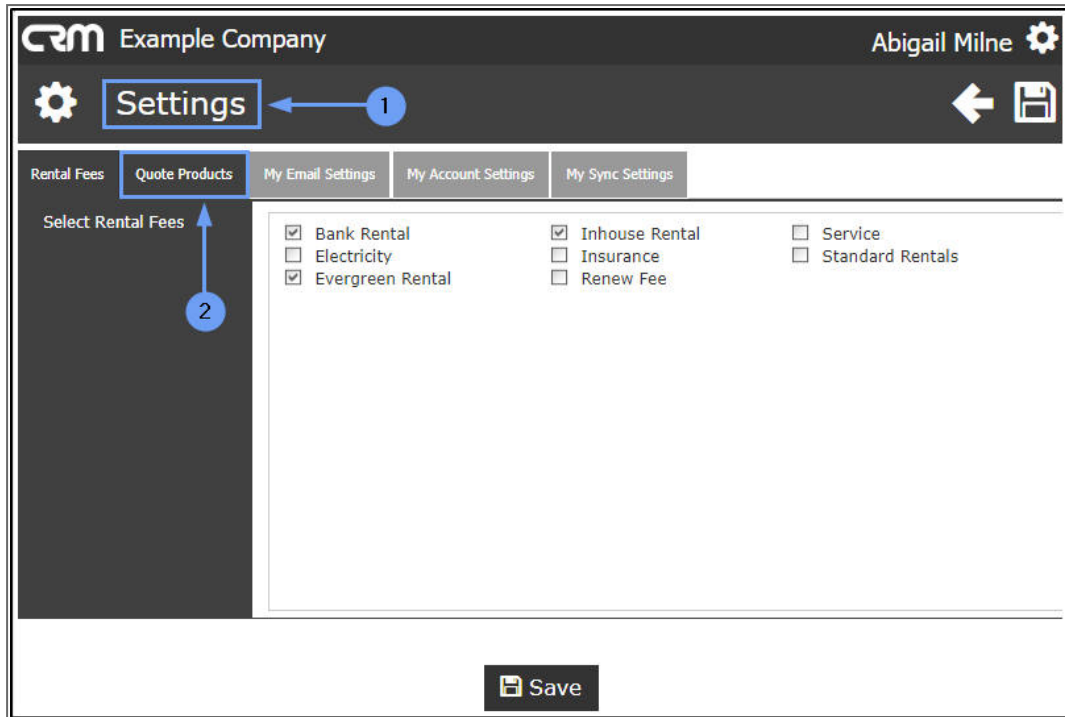
- settings
- salesmen settings
- customer ranks
- case config
- logout

The 'Options' section is also visible, with the following checkboxes:

- ☐ Show items for subordinates
- ☐ Exclude deleted customers in search on Cold Call screen
- ☐ Hide dashboard panel
- ☐ Hide dashboard panel on customer page

The dashboard also features a bar chart showing 'Cases', 'Invoices', 'Orders', and 'Quotes' for the period from Nov 2019 to Feb 2020. The bottom of the dashboard displays the CO3 Technologies logo and copyright information: ©2019 CO3 Technologies (Pty) Ltd (3.5.6.0 / 3.5.6.0).

1. The **Settings** page will open.
2. Click on the **Quote Products** tab.



QUOTE PRODUCTS LISTING PAGE

1. A full list of **inventory** (part) **definitions** from BPO will be displayed.
2. The **Page Reference** field indicates how many pages of items there are and how many items are listed in total (e.g. Page 1 of 10 (97 items)).
3. The **bold** number indicates which page is currently open. In this example, page **1** (of 10) is open.
4. The **Page size** field indicates how many lines of items are listed on each page (in this example there are currently 10 items listed per page).


Example Company

Abigail Milne



Settings



Rental Fees
Quote Products
My Email Settings
My Account Settings
My Sync Settings

Part Image	Part Number	Part Name	Available for CRM Quotes
	SP2020	SP2020 Sprint Colour Multi Functional Copier	☒
	2020-147K	Black toner SP2020	☒
	SP1919	SP1919 Sprint Colour MFC	☒
	SP19-147K	Black Toner SP1919	☒
	SP19-147C	Cyan Toner - SP1919	☐
	SP19-147Y	Yellow Toner - SP1919	☒
	SP19-147M	Magenta toner - SP1919	☒
	2020-147M	Magenta toner SP2020	☒
	2020-147C	Cyan toner SP2020	☒
	CL-100-965	Cleaner	☒

Page 1 of 10 (97 items)

Page size: 10

[Create Filter](#)

 Save

SEARCH / FILTER QUOTE PRODUCT ITEM

1. You can use the [Filter Search Row](#), or the
2. [Create Filter](#) functionality to search for a particular item.
3. Click on a **Part Image**.

CRM

Example Company

Abigail Milne

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Settings

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Rental Fees

Quote Products

My Email Settings

My Account Settings

My Sync Settings

1

Part Image

Part Number

Part Name

Available for CRM Quotes

	SP2020	SP2020 Sprint Colour Multi Functional Copier	☒
	2020-147K	Black toner SP2020	☒
	SP1919	SP1919 Sprint Colour MFC	☒
	SP19-147K	Black Toner SP1919	☒
	SP19-147C	Cyan Toner - SP1919	☐
	SP19-147Y	Yellow Toner - SP1919	☒
	SP19-147M	Magenta toner - SP1919	☒
	2020-147M	Magenta toner SP2020	☒
	2020-147C	Cyan toner SP2020	☒
	CL-100-965	Cleaner	☒

Page 1 of 10 (97 items)

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Page size: 10

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Create Filter

Save

EDIT / UPDATE QUOTE PRODUCT ITEM

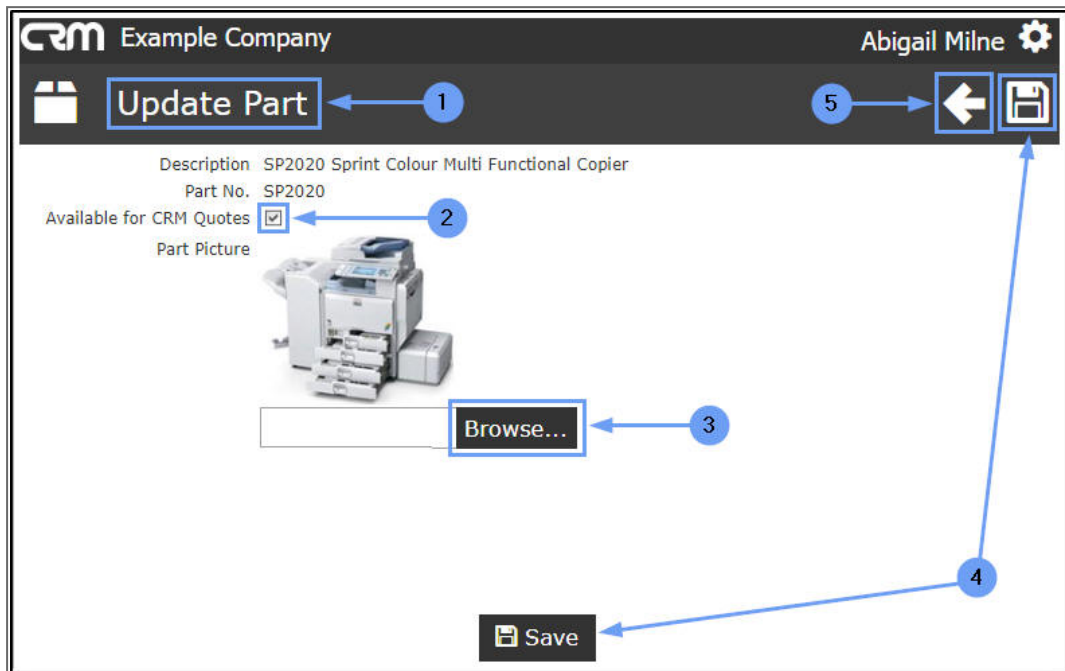
1. The **Update Part** page will open.
2. You can edit the **Available for CRM Quotes** check box.
 - Marking this check box will make this part code available for selection when adding single items to a quote.
3. **Browse** for a product picture, if required.

Either

4. Click on **Save** if you have made any changes and wish to keep them.

Or

- Click on **Back** to return to the previous page.



MARK PRODUCT ITEM AS AVAILABLE

- In the **Settings** page,
- You can also mark whether the item is **Available for CRM Quotes**.
- This is helpful, if you wish to configure multiple items at a time.

Either

- Click on **Save** if you have made any changes and wish to keep them.

Or

- Click on the **Settings** icon or the **CRM** logo to return to the Dashboard (Home page).


Example Company

Abigail Milne



Settings




Rental Fees
Quote Products
My Email Settings
My Account Settings
My Sync Settings

Part Image	Part Number	Part Name	Available for CRM Quotes
	SP2020	SP2020 Sprint Colour Multi Functional Copier	☒
	2020-147K	Black toner SP2020	☒
	SP1919	SP1919 Sprint Colour MFC	☒
	SP19-147K	Black Toner SP1919	☒
	SP19-147C	Cyan Toner - SP1919	☐
	SP19-147Y	Yellow Toner - SP1919	☒
	SP19-147M	Magenta toner - SP1919	☒
	2020-147M	Magenta toner SP2020	☒
	2020-147C	Cyan toner SP2020	☒
	CL-100-965	Cleaner	☒

Page 1 of 10 (97 items)

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Page size: 10

[Create Filter](#)

 Save

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