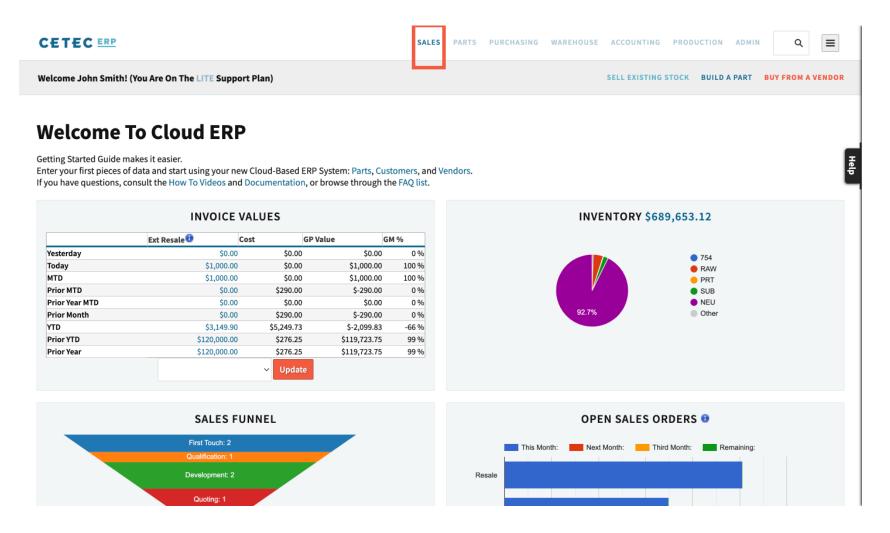


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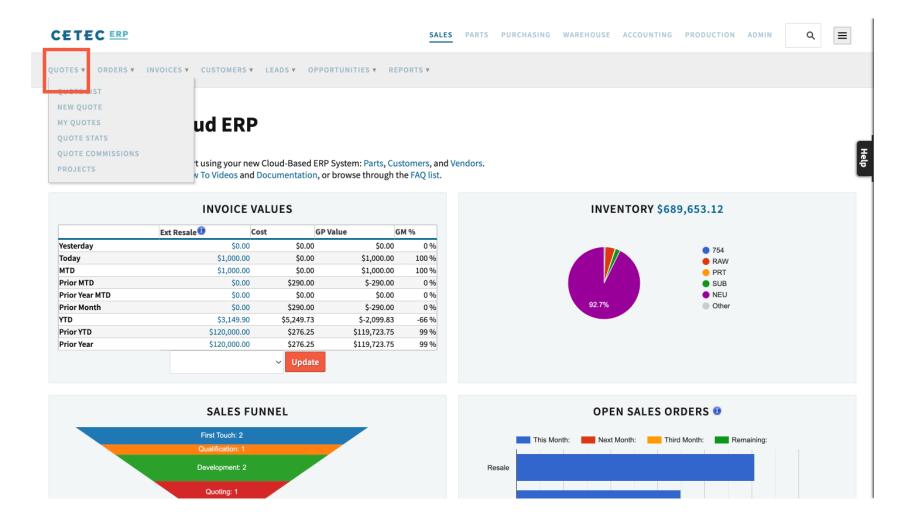
To clone a quote we'll find a quote by clicking Sales



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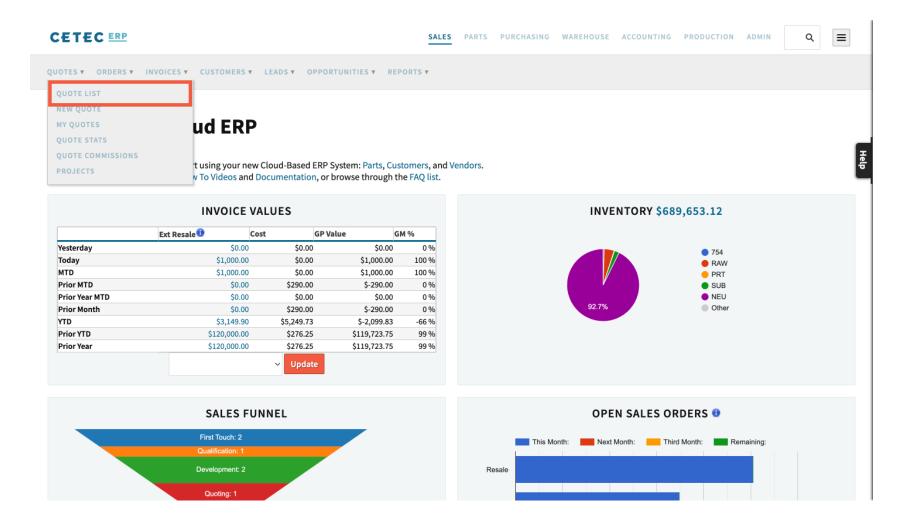
Click Quotes



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Click Quote List

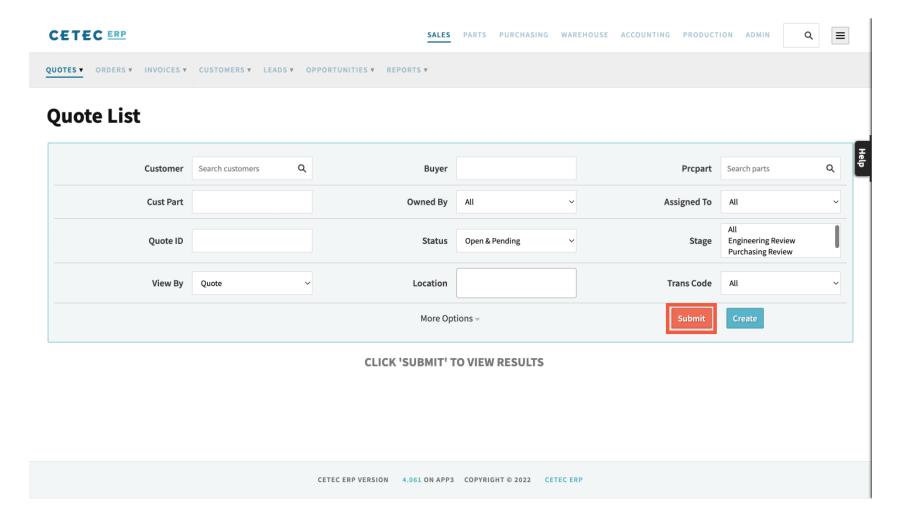


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Click Submit

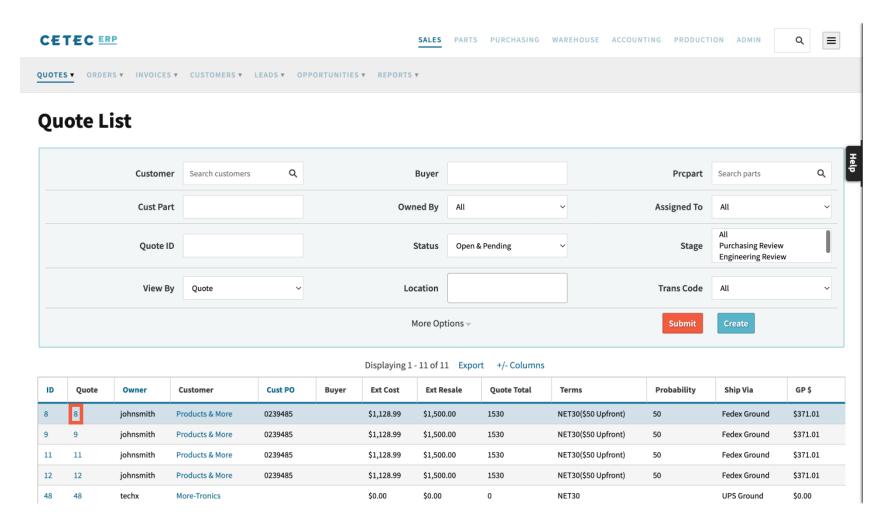


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Cetec ERP

Select Quote number

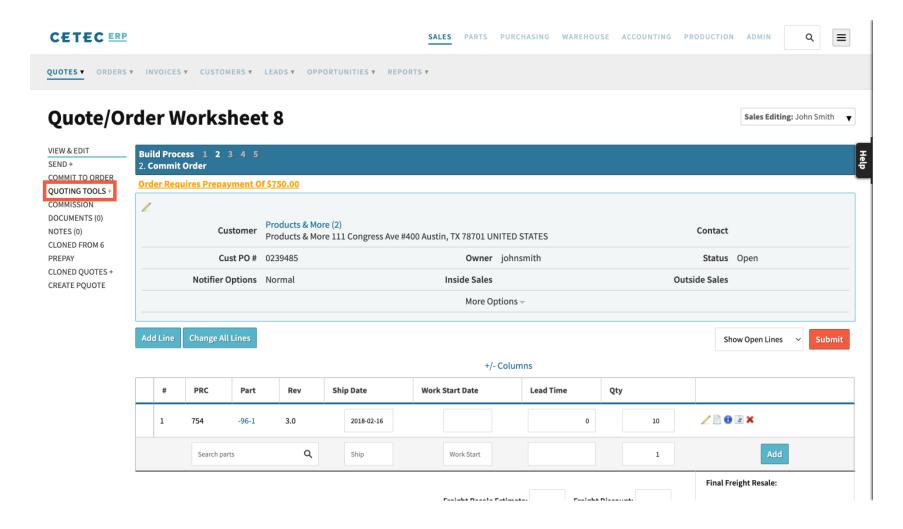


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Cetec ERP

Click Quoting Tools +

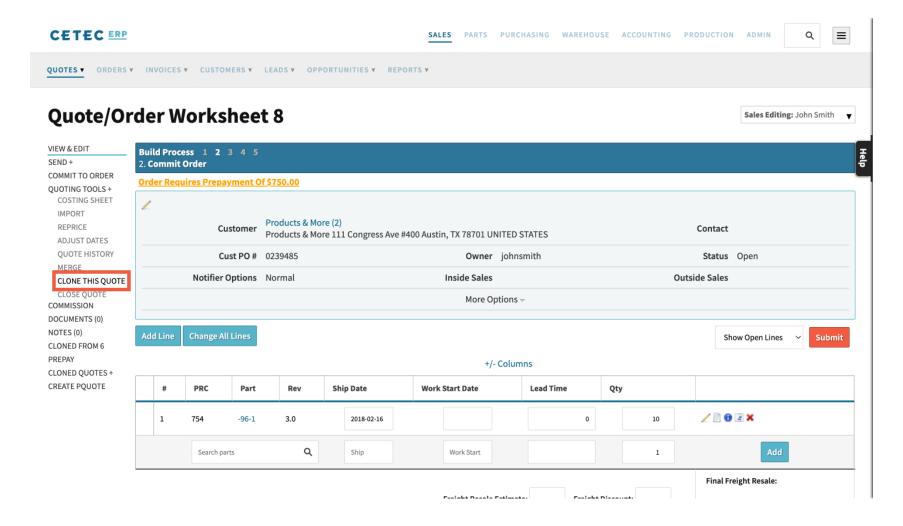


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Cetec ERP

Click Clone This Quote



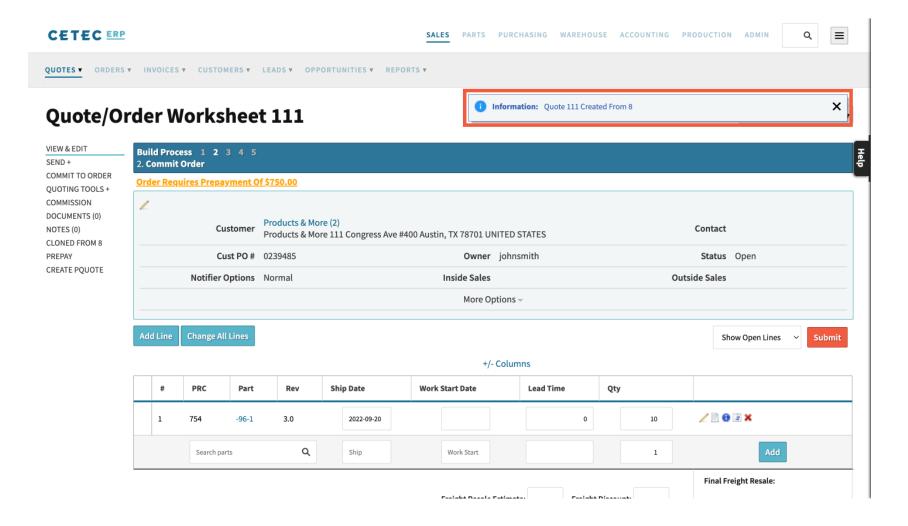
Nov 14, 2022 7 of 16

CETEC ERP

How to Clone and Close Quotes

Cetec ERP

The new quote is an exact copy of the original quote.



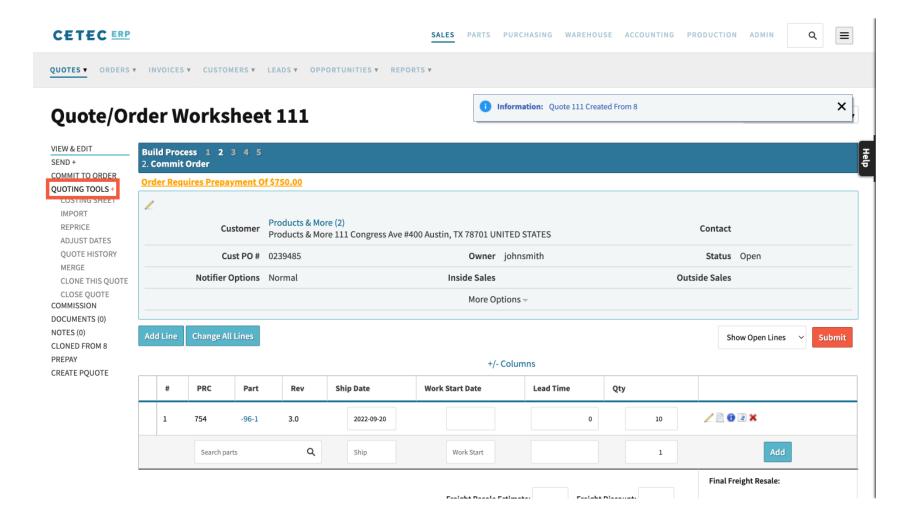
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CETEC ERP

How to Clone and Close Quotes

Cetec ERP

Now, if we want to close this quote, we'll click Quoting Tools+

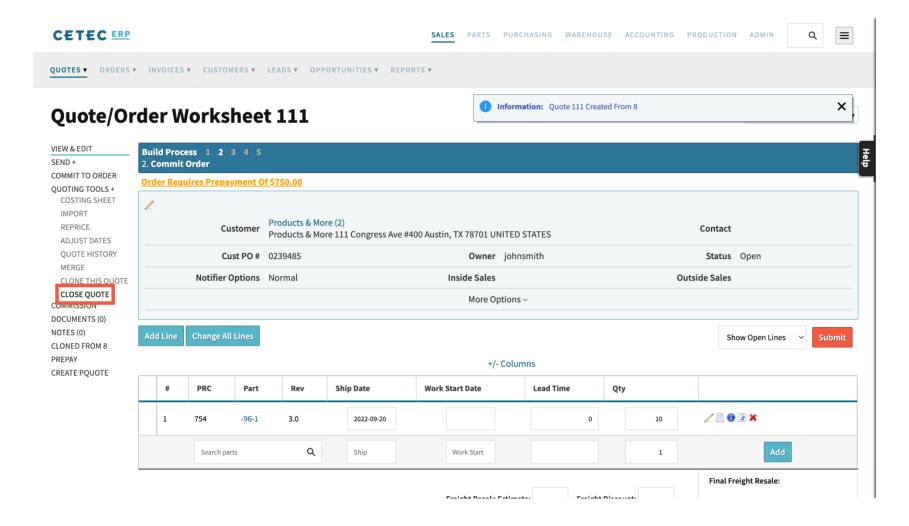


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Cetec ERP

Click Close Quote

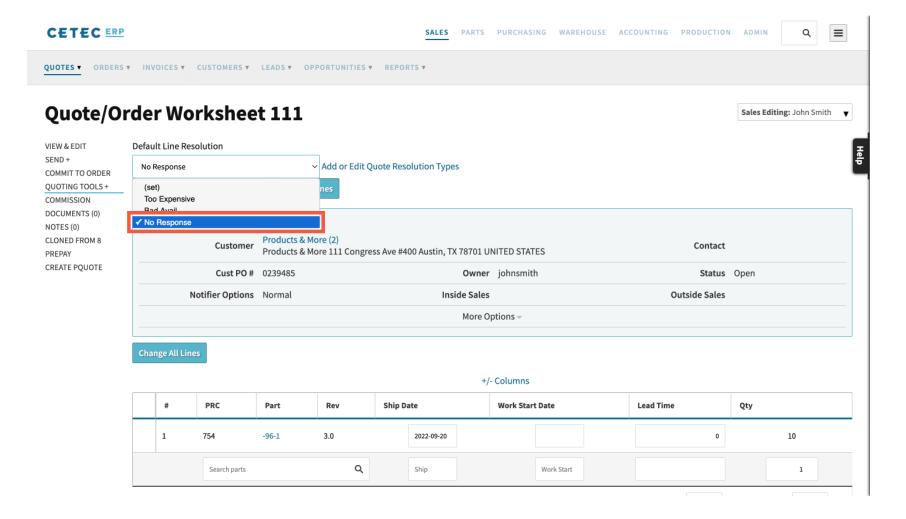


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Select your resolution type. These can be edited under Admin>Maintenance>Data Maintenance>*Quote Resolution*

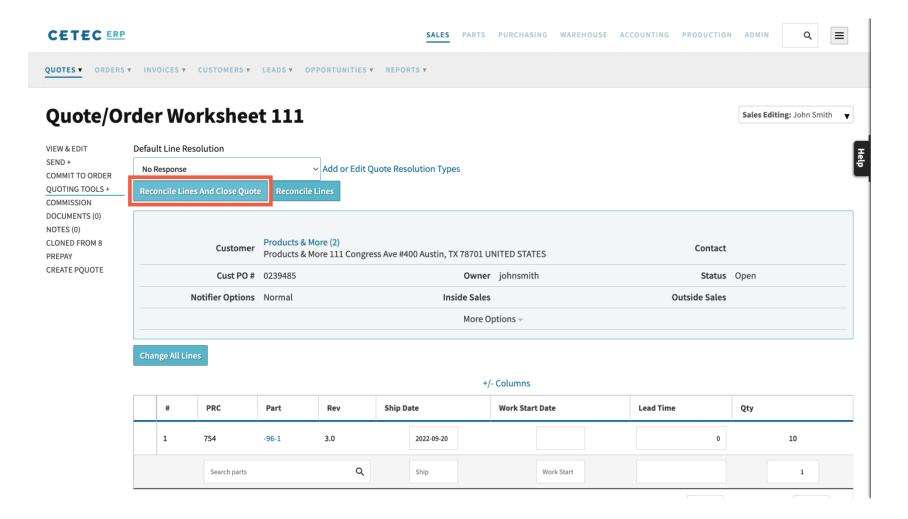


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Click Reconcile Lines And Close Quote

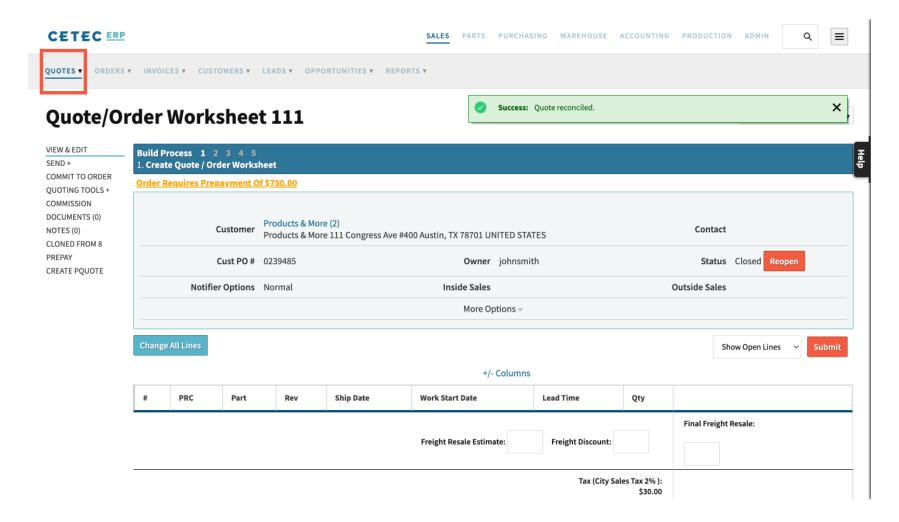


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To view quote data corresponding to closed quote, click Quotes

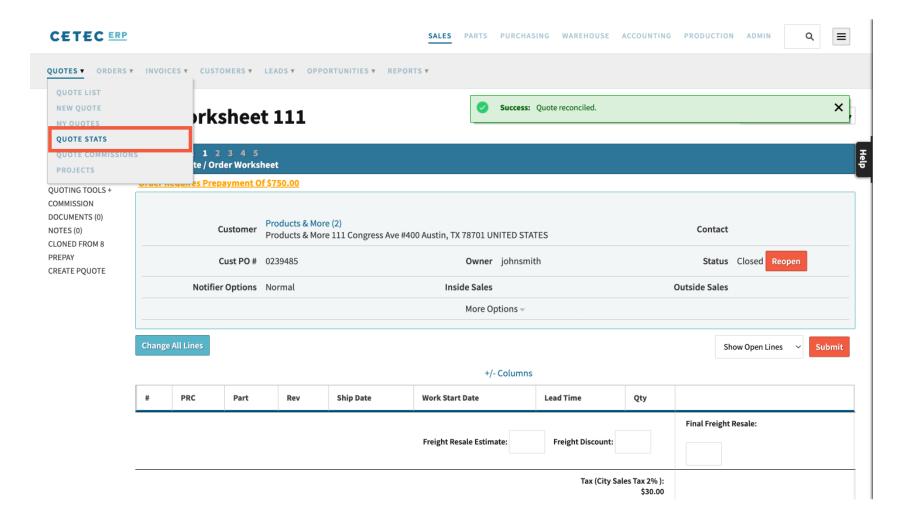


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Click Quote Stats



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See the Quote Line breakdown section which highlights details of all quotes (closed, open, and converted to orders).

Specify Restrictions					
Creation Date	2022-08-20 - 2022-09-21	Use	All	User Type Quot	e Creator V
New Business Only?	0	Exclude Inte	rcompany?	Subn	nit
OVERVIEW					
# Quotes	# Quotes Ordered	# First Customer Orders	# Customers	Quoted	# Customers Who Ordered
10	7 (70.00 %)	0		4	2
QUOTE LINE BREAKDOWN					
Displaying 1 - 8 of 8 Export +/- Columns					
Туре		Number	Cost	Resale	GM
Ordered		12	\$407.20	\$527.50	22.81 %
First Customer Orders		0	\$0.00	\$0.00	0.00 %
Bad Avail		0	\$0.00	\$0.00	0.00 %
No Response		1	\$1,128.99	\$1,500.00	24.73 %
Too Expensive		0	\$0.00	\$0.00	0.00 %
Closed, But Not Reconciled		0	\$0.00	\$0.00	0.00 %
Still Open		0	\$0.00	\$0.00	0.00 %
Total		13	\$1,536.19	\$2,027.50	24.23 %
Displaying 1 - 8 of 8 Export +/- Columns					

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Scan to go to the interactive player

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