Sterling Configure, Price, Quotes

User Guide

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Sterling Commerce
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Contents

Overview of Sterling Quotes

Salesforce.com is an on-demand Customer Relationship Management (CRM) tool that provides prebuilt applications ranging from sales force automation to partner relationship management, marketing, sales opportunities, and customer service. As part of your CRM, you use Sterling Quotes to manage quotes and close business deals more efficiently.

In Sterling Quotes, you can store all the information you require during the quoting process, including customer details, information about products and the adjustments made to the price of products, and the payment terms and shipment terms that will be used in the order if the quote is converted to an order.

A Sterling Quote moves through the following statuses in its life cycle:

- Created - You can create a quote only after you have created an opportunity. After a quote is created, you can add products to the quote, adjust the price of the products if required, and define the payment terms and shipment terms.

- Approved - A quote must be approved by an approver before you can present it to a customer if any or all of the following conditions are met:

    - Any of the products in the quote fails validation. For example, a product in the quote may fail validation because the quantity of the product is either less than the minimum order quantity or more than the maximum order quantity configured for that product.

    - The quote violates an approval rule. For example, let us suppose that an approval rule has been configured such that the quote requires approval every time the expiration date of the quote is modified. In such a scenario, if you modify the expiration date of the quote, the quote must be approved by an approver before you can present it to a customer.

    - The adjustments applied to the quote or any of the products in the quote under a manual pricing rule exceeds the maximum discount limit configured for the rule. For example, if the maximum discount limit configured for a 32" LCD television under a manual pricing rule is 5%, and you offer a discount of 7% to a customer, the quote must be approved before you can present it to the customer.

- Presented - You can present a quote to a customer after all the necessary approvals have been obtained.

- Accepted - After a quote is presented to a customer, if the customer wants to accept the quote in its current form, you can accept the quote on behalf of the customer.

- Rejected - After a quote is presented to a customer, if the customer does not agree to any or all of the contents of the quote and wants to reject the quote in its current form, you can reject the quote on behalf of the customer. After a quote is rejected, if you want to make modifications to the quote and present it to the customer again, you must rework the quote.

- Ordered - After a customer accepts a quote, you can convert the quote to an order.

- Abandoned - You can abandon a quote if the quote no longer serves a purpose.

The typical life cycle of a quote is illustrated in the following figure:
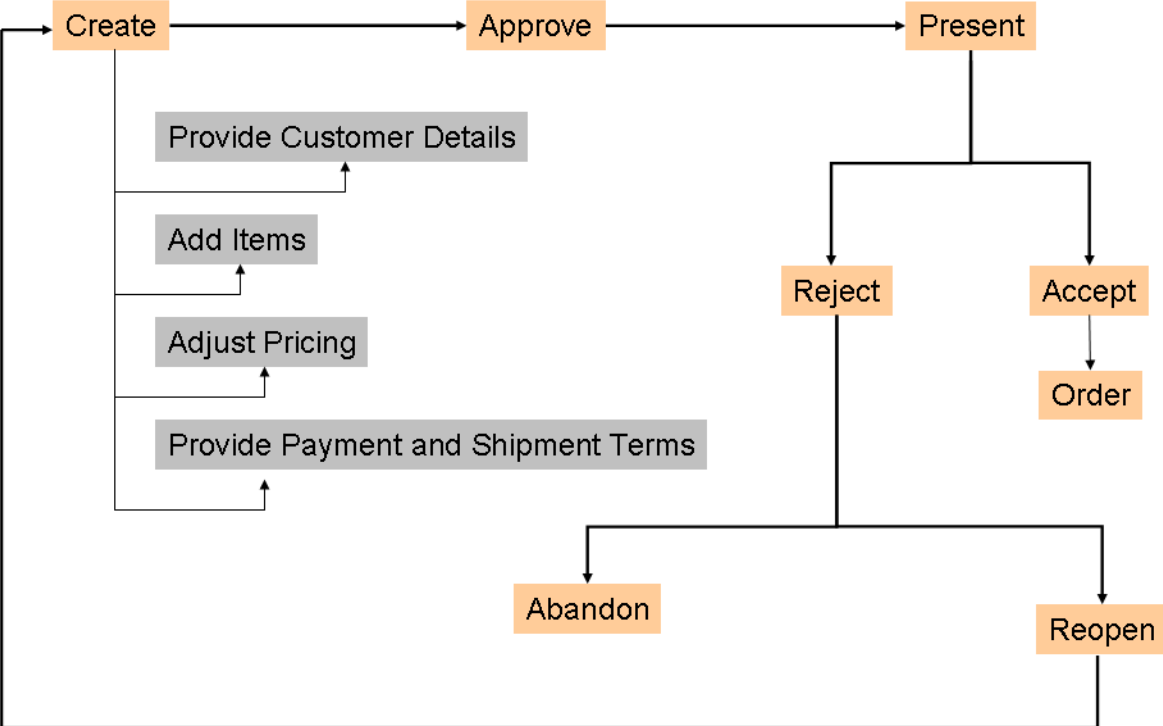
Using the Quote Home Page

The Quote Home page allows you to search for existing quotes and products, view a list of quotes pending approval, and other custom dashboard items.

The Quote Home page comprises the following panels:

- Home
- Dashboard

Using the Home Panel

The **Home** panel enables you to search for quotes and products.

To search for a quote, click the **Find Quote** hyperlink. Alternatively, you can enter a search term in the **Search** box and click 🔍 to search for a quote. For more information about searching for a quote, refer to the topic, "Search for a Quote".

To search for products, click the **Find Product** hyperlink. For more information about searching for a product, refer to the topic, "Browse for Products and Check Availability Using Quote Home Page".

Using the Dashboard

The **Dashboard** panel lists quotes pending approval, by default, and enables you to customize the dashboard view.

List of quotes pending approval is displayed in the following columns:

- **Quotes Pending My Approval**: Displays a maximum of 25 quotes that are pending your approval.
- **My Quotes Pending Approval:** Displays a maximum of 25 quotes for which you have requested approval.

You can configure the **Dashboard** to display the details that you want to see more often by adding frequently viewed items.

Customize the Quotes Dashboard

You can configure the dashboard to display only those dashlets that you want to see more often. The changes that you make to the dashboard are saved, and the dashlets that you select are displayed every time you log in.

You can perform any of the following actions to customize the **Dashboard** panel:

- Add a Dashlet to the Dashboard
- Change the Order of Dashlets in the Dashboard
- Change the Dashboard Layout
- Reset the Dashboard
- Remove a Dashlet from the Dashboard

Add a Dashlet to the Dashboard

You can add the **Recently Modified Quotes** dashlet to the **Dashboard** panel. The **Recently Modified Quotes** dashlet displays a maximum of 10 of your most recently modified quotes. The quotes are displayed in the order of the modification time, with the most recently modified quote at the top of the list.

To add a dashlet to the dashboard:

1. In the **Dashboard** panel, click the **Customize** hyperlink.
2. The **Customize Dashboard** panel is displayed. In the **Dashlets** panel, select the **Quote** check box.
3. The available dashlets are displayed. Click **Add Dashlet** to add the selected dashlet to the dashboard.
   Notes:
   - You can add multiple dashlets at one time.
   - After you click **Add Dashlet**, the changes are saved automatically.
4. Click **Show Dashboard** to return to the **Dashboard** panel.

Change the Order of Dashlets in the Dashboard

You can change the order in which the dashlets are displayed in the **Dashboard** panel. For example, if you want the **Recently Modified Quotes** dashlet to be displayed at the top, you can configure the dashboard accordingly.

To change the order of the dashlets, in the **Dashboard** panel, drag the dashlet header and drop it to the desired location.

Note: After you change the order of the dashlets, the changes are saved automatically.

Change the Dashboard Layout

Based on the implementation , you can change the layout of the **Dashboard** panel. The changes that you

make to the layout are saved and displayed every time you log in.

To change the dashboard layout:

1. In the **Dashboard** panel, click the **Customize** hyperlink.

2. The **Customize Dashboard** panel is displayed. From the layouts displayed, select the layout you want to use by clicking the corresponding radio button.

3. Click **Save Layout** to save the changes.

4. Click **Show Dashboard** to return to the **Dashboard** panel**.**

Reset the Dashboard

Resetting the dashboard allows you to cancel your changes, and revert to the default settings.

To reset the dashboard:

1. Click **Reset Dashboard** in the **Dashboard** panel.

   A message asking you for confirmation is displayed.

2. Click **Yes** to reset the dashboard, and revert to default settings.

Remove a Dashlet from the Dashboard

You can remove a dashlet if you no longer want it to be displayed in the **Dashboard** panel.

To remove a dashlet from the **Dashboard** panel, click corresponding to the dashlet that you want to remove. The dashlet is removed from the **Dashboard** panel.

Create a Quote for an Opportunity

A quote is a commercial document that allows a prospective buyer to see a predetermined set of products and quantities at a predetermined price to be delivered on a specific date. A quote is always associated with an opportunity.

Note: You can create a quote only after you have created an opportunity.

To create a quote for an opportunity:

1. Click the **Opportunities** tab in the menu bar.

2. The Opportunities Home page is displayed. By default, the Opportunities Home page displays the recently created opportunities. To view other opportunities, select a view from the **View** drop-down list.

3. Click the opportunity for which you want to create a quote.

4. The details of the opportunity are displayed. In the **Sterling Quotes** related list, click **New Sterling Quote**.

5. The **Quote Details** screen is displayed with the following read-only information:

    ᴵ *<Contact details>*: The contact details defined for the opportunity.

    ᴵ **Status**: The status of the quote. This is always displayed as Created when a new quote is created.

    ᴵ **Quote ID**: The system-generated unique identifier of the quote.

    ᴵ **Opportunity Name**: The name of the opportunity for which the quote is created.

    ᴵ If the quote is the primary quote, the ✅ icon is displayed to indicate that the quote is the primary quote. If the quote is not the primary quote, the ⚠️ icon is displayed to indicate that the quote is not the primary quote. By default, the first quote for an opportunity is assigned as the primary quote.

6. (Optional) In the **Primary Information** panel, you can perform the following steps:

    ᴵ In the **Name*** box, enter a name for the quote. By default, the name of the opportunity is displayed.

    ᴵ Click 🗓 adjacent to the **Expiration Date** box to select the date by which the quote will expire.

    Note: If you do not select a date, the expiration date of the quote will be defaulted based on the configuration.

    By default, the customer details are populated from the opportunity.

7. Click **Save**.

    A new quote for the selected opportunity is created. After creating the quote, you can modify the customer details, add notes to a quote, add products to the quote, define the product quantity, adjust the price of the products, and define the payment and shipment terms.

Note: * indicates that the field is mandatory.

See also:

- Modify the Customer Details for a Quote
- Add a Note to a Quote
- Add a Product to a Quote
- Define the Payment and Shipment Terms for a Quote

View List of Quotes from Opportunity Screen

You can view the list of quotes that are associated with an opportunity using the **Opportunities** tab. You can view the quotes associated with the opportunity when viewing the details of that opportunity.

To view the list of quotes from the Opportunity screen:

1. Click the **Opportunities** tab in the menu bar.
2. The Opportunities Home page displays the list of available opportunities. Click the corresponding opportunity name hyperlink.

    The details of the opportunity are displayed, with the **Sterling Quotes** related list displaying the quotes that are associated with the opportunity. By default, the **Sterling Quotes** related list displays a maximum of 5 quotes. If there are more than 5 quotes, you can perform either of the following steps to view the remainder of the quotes:

    - Click the **Show** *<number of quotes>* **more** hyperlink. The next set of a maximum of 5 quotes is displayed in addition to the original list.
    - Click the **Go to list** hyperlink. The list of all the available quotes is displayed.

Add a Note to a Quote

Notes in a quote can be used as an information repository to track a quote through its life cycle, and can be used for future references. You can add new notes to a quote.

You can add a note to a quote when performing any of the following tasks:

- Viewing the quote summary
- Modifying the quote details
- Viewing the approval summary
- Presenting a quote to a customer
- Viewing alternative quotes
- Generating a Proposal
- Reworking a quote
- Converting a quote to an order
- Abandoning a quote

This topic describes how to add a note to a quote when viewing the quote summary or modifying the details of a quote.

To add a note to a quote:

1. Click the **Sterling Quotes** tab in the menu bar.
2. The Quote Home page is displayed. Perform either of the following steps:
   - Click the **Find Quote** hyperlink.
   - In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

     If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

     However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.
3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.
4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.
5. The Quote Summary screen is displayed. Perform one of the following:
   - Click the **View/Add Notes** hyperlink.
   - From the **Actions** drop-down list, select **Modify Quote**. In the Quote Details screen, click the **View/Add Notes** hyperlink.

6. The **Notes** dialog box is displayed. Perform the following steps:

- In the **Note Text** box, enter appropriate notes.

- From the **Note Type** drop-down list, select the note type for the note.

- Select the **For internal use only** check box to indicate that the note is meant for internal viewing only. If you select this check box, the note will be displayed only to internal users, and not to customers.

7. Click **Add Note**.

   Note: It is mandatory that you enter the note text.

8. Click **Close** to close the **Notes** dialog box.

Modify Contact Details

After a quote is created for an opportunity, you can modify customer information in the quote. You can modify the contact details for a quote. For example, you can modify the phone number or the e-mail address of the customer.

To modify the contact details of a customer:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

   □ Click the **Find Quote** hyperlink.

   □ In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

     If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

     However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following steps:

   □ From the **Actions** drop-down list, select **Modify Quote**. The Quote Details screen is displayed. Click the **Customer** tab.

   □ Click **Edit** in the **Customer** panel. The Quote Details screen is displayed.

6. To modify the contact details, perform the following tasks:

   a. In the **Contact** panel under the **Customer** tab, click the **Edit** hyperlink.

   b. The **Edit Contact** dialog box is displayed. Modify the following fields, as appropriate, and click **Save**:

      - In the **Phone No*** box, enter the phone number of the customer.

      - In the **E-mail Address*** box, enter the e-mail address of the customer.

      Note: * indicates that the field is mandatory.

7. Click **Save** in the Quote Details screen to save the quote.

Modify the Shipping Address of a Customer

After a quote is created for an opportunity, you can modify customer information in the quote. You can modify the shipping address of a customer for the selected quote by either selecting a different address from the list of existing addresses defined for the customer or adding a new address for the customer.

To modify the shipping address of a customer:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

    ᴸ Click the **Find Quote** hyperlink.

    ᴸ In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

      If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

      However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

    Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following tasks:

    ᴸ From the **Actions** drop-down list, select **Modify Quote**. The Quote Details screen is displayed. Click the **Customer** tab.

    ᴸ Click **Edit** in the **Customer** panel. The Quote Details screen is displayed.

6. To modify the shipping address, perform the following steps:

    a. In the **Shipping Address** panel, click **Edit**.

    b. The **Edit Address** dialog box is displayed. Modify the following fields, as appropriate:

    - To use an address from the existing list of addresses, select an address from the **Existing Addresses** drop-down list.

    - In the **First Name*** box, enter the first name of the customer.

    - In the **Last Name*** box, enter the last name of the customer.

    - In the **MI** box, enter the middle initial of the customer.

    - From the **Title** drop-down list, select the title of the customer. For example, Mr., Mrs., Dr., and so on.

    - In the **Company** box, enter the name of the company. By default, the company name of the contact is displayed. You can change the company name if required.

    - In the **Address** boxes, enter the address of the customer.

    - From the **Country*** drop-down list, select the country in which the customer resides.

    - In the **Postal Code** box, enter the postal code of the city in which the customer resides.

    - In the **City** box, enter the name of the city in which the customer resides.

    - In the **State** field, enter or select the name of the state in which the customer resides. Based on the way it is configured by your administrator, the State field is displayed either as a box or a drop-down list.

    Note: Based on the configuration, the **City** and **State** fields are automatically populated based on the country you select and the postal code that you enter.

    - In the **Address Type** field, select the appropriate radio button. Select **Commercial** if the address is the commercial address of the customer, or select **Residential** if the address is the residential address of the customer.

    c. Click **Save** to save the details and return to the Quote Details screen.

    Notes:

    ▪ * indicates that the field is mandatory.

    ▪ If you enter an invalid address, the **Select Address** dialog box displays valid addresses that are closest to the one that you entered. Select the appropriate option.

7. Click **Save** in the Quote Details screen to save the quote.

Modify the Billing Address of a Customer

After a quote is created for an opportunity, you can modify customer information in the quote. You can modify the Bill To address of a customer in a quote by either selecting a different address from the list of existing addresses defined for the customer or adding a new address for the customer.

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

   - Click the **Find Quote** hyperlink.

   - In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

     If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

     However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following tasks:

   - From the **Actions** drop-down list, select **Modify Quote**. The Quote Details screen is displayed. Click the **Customer** tab.

   - Click **Edit** in the **Customer** panel. The Quote Details screen is displayed.

6. To modify the billing address, perform the following steps:

   a. In the **Billing Address** panel, click **Edit**.

   b. The **Edit Address** dialog box is displayed. Modify the following fields, as appropriate:

      - To use an address from the existing list of addresses, select an address from the **Existing Addresses** drop-down list.

      - In the **First Name*** box, enter the first name of the customer.

      - In the **Last Name*** box, enter the last name of the customer.

      - In the **MI** box, enter the middle initial of the customer.

      - From the **Title** drop-down list, select the title of the customer. For example, Mr., Mrs., Dr., and so on.

      - In the **Company** box, enter the name of the company. By default, the company name of the contact is displayed. You can change the company name if required.

      - In the **Address** boxes, enter the address of the customer.

      - From the **Country*** drop-down list, select the country in which the customer resides.

      - In the **Postal Code** box, enter the postal code of the city in which the customer resides.

      - In the **City** box, enter the name of the city in which the customer resides.

      - In the **State** field, enter or select the name of the state in which the customer resides. Based on the way it is configured by your administrator, the State field is displayed either as a box or a drop-down list.

      Note: Based on the configuration, the **City** and **State** fields are automatically populated based on the country you select and the postal code that you enter.

      - In the **Address Type** field, select the appropriate radio button. Select **Commercial** if the address is the commercial address of the customer, or select **Residential** if the address is the residential address of the customer.

   c. Click **Save** to save the details and return to the Quote Details screen.

   Notes:

   ᴸ * indicates that the field is mandatory.

   ᴸ If you enter an invalid address, the **Select Address** dialog box displays valid addresses that are closest to the one that you entered. Select the appropriate option.

7. Click **Save** in the Quote Details screen to save the quote.

Add a Product to a Quote

You can add a product to a quote as either a quote line or a recommended line. Recommended products are products that you recommend to a customer in addition to the list of products the customer has requested for. When recommended products are added to a quote, these products are not taken into consideration when the quote's profit margin and the quote total are calculated.

After adding the products, you can adjust the price of the products and define the quantity of the products before presenting the quote to a customer.

Notes:

- You can only add the products that are available in the catalog of the enterprise for which the quote is created.
- You can only add products to a quote. You cannot add provided services or delivery services to a quote.

Before you add a product to a quote, you can check the product's availability. For more information about checking the product's availability, refer to the topics:

- Browse for Products and Check Availability Using Quote Details Screen
- Browse for Products and Check Availability Using Quote Home Page

To add a product to a quote:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

   - Click the **Find Quote** hyperlink.

   - In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

     If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

     However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following steps:

   - From the **Actions** drop-down list, select **Modify Quote**.

   - Click **Edit** in the **Lines** panel.

6. The **Quote Details** screen is displayed, with the **Products** tab highlighted. Perform either of the following tasks:

ɪ Click the **Quote Lines** tab to add a product as a quote line.

ɪ Click the **Recommended Lines** tab to add a product as a recommended line.

Note: The **Recommended Lines** tab will be displayed or hidden based on the configuration.

7. To add a product for a quote, perform either of the following tasks:

ɪ Click **Enter the Product ID**, enter the complete Product ID of the product you want to add to the quote, and then click ➕.

ɪ **Note:** If multiple products exist with the same Product ID you enter in the box, an error message is displayed.

ɪ Search for the product that you want to add to the quote by clicking **Browse**.

The **Product Search** dialog box displays the list of available products. If a product is configurable, the 🔧 **Product is configurable** is displayed adjacent to the product. To add a product to the quote, perform one of the following tasks and click **Close**:

- Click **Add to Quote** to add a product to the quote.

- Click **Select Variation Product** to select a variation product and add it to the quote. Click the **Variation Products** tab. Select the appropriate options and click **Add to Quote**.

- To view the product details and add the product to the quote, click the *<short description of product (Product ID)>* hyperlink. Click **Add to Quote**.

The product is displayed in the list of products displayed under the **Products** tab.

8. In the box under the **Quantity** column, enter the appropriate quantity.

Note: If the product is a bundle product, the unit price of the product is displayed based on the bundle pricing strategy that has been configured for that product.

9. Click **Save**.

The product is added to the quote and the unit of measure (UOM), unit price, adjustments, and line total are automatically populated.

Note: An error message is displayed if the product is a configurable product and the product has not been configured. To add the product to the quote, you must first configure the product.

Browse for Products and Check Availability Using Quote Home Page

You can browse the product catalog and view the details of the product. You can view the details of a product and check its availability by searching for a product from the Quote home page.

View Product Details

To view the details of a product:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Click the **Find Product** hyperlink.

3. The **Product Search** page displays a list of all the available products in the catalog. If a product is configurable, the 🔧 **Product is configurable** is displayed.

4. To view the details of a product, click the **<short description of product (Product ID)>** hyperlink. Alternatively, click the product's image.

   The Product Details screen is displayed with the following information:

   - The description of the product.

   - The unit of measure defined for the product.

   - The unit price of the product.

   - The **Overview** tab displays a summary of the product.

   - The **Specifications** tab displays the attributes and values associated with the attributes, and the physical dimensions associated with the product.

   - The **Components** tab displays the components of the product.

     Note: This tab is displayed only if the product is a bundle, physical kit, or logical kit. However, this tab is not displayed for a configurable bundle product that does not contain any configurations.

   - The **Variation Products** tab displays the details of the variations assigned to the product. A variation product is a product that is available in different variations. For example, a shirt may be available in different size variations, such as Extra Small, Small, Large, and Extra Large, and color variations, such as Black, White, and Red.

     To view the details of a product in different variations, select the appropriate attribute values assigned to the product. For example, to view the image of a Red color shirt in Large size, you can select the Red and Large attribute values. When you make your selections, only the attribute values that are available with the combination that you have already selected are enabled.

     Note: This tab is displayed only if the product is a variation product.

   - The **Cross-Sell** tab displays the details of the cross-sell products associated with the product. For example, if a DVD player has been associated with an LCD TV as a cross-sell product, the details of the DVD player are displayed.

     Note: This tab is displayed only if the product has any cross-sell products associated with it.

- The **Up-Sell** tab displays the details of the up-sell products associated with the product. For example, if an LCD TV has been associated with a 21" TV as an up-sell product, the details of the LCD TV are displayed.

  Note: This tab is displayed only if the product has any up-sell products associated with it.

5. To view more images and additional information about the product, click the **More Images** hyperlink. Click **Close** to close the More Images dialog box to return to the Product Details screen.

6. To view a detailed description of the product, click the **More Details** hyperlink. A new browser window displays a detailed description of the product.

Note: * indicates that the field is mandatory.

Check Product Availability

To check the availability of a product:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Click the **Find Product** hyperlink.

3. The **Product Search** page displays a list of all the available products in the catalog. If a product is configurable, the 🛠 **Product is configurable** is displayed.

4. To check the availability of a product, click the **Check Availability** hyperlink.

5. The **Product Availability** dialog box is displayed with the following details:

   - The short description of the product.

   - The requested quantity of the product.

   - The product's availability status.

6. Click **Close** to close the **Product Availability** dialog box and return to the Product Details screen.

   Note: The system checks whether the product is available, based on the minimum order quantity of the product configured by your administrator.

Browse for Products and Check Availability Using Quote Details Screen

You can browse the product catalog and view the details of the product. You can view the details of a product and check its availability by searching for a product from the Quote Details screen.

View Product Details Using Quote Details Screen

To view the details of a product using the Quote Details screen:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

   ▫ Click the **Find Quote** hyperlink.

   ▫ In the **Search** box, enter the name of the quote as the search criteria and click 🔍. The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

   If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

   However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following steps:

   ▫ From the **Actions** drop-down list, select **Modify Quote**.

   ▫ Click the **Edit** hyperlink in the **Lines** panel.

6. The Quote Details screen is displayed, with the **Products** tab highlighted. Click **Browse**.

   The **Product Search** page displays a list of all the available products in the catalog. If a product is configurable the 🖉 **Product is configurable** is displayed. You can perform the following tasks:

   ▫ To search for a product within the search results, click **Search in Results**, enter the appropriate keyword, and then click 🔍.

   ▫ You can browse for available products in a particular category or subcategories. By default, the **Browse Categories** panel in the **Product Search** page displays all the available product categories and subcategories, and the number of products available in each category. To view specific products available in a category, click the **<category>** hyperlink. The available products in a category are displayed in the **Search Results** panel.

   Note: To view the sub-categories, click 🔺.

- You can sort the products displayed in the **Search Results** panel by selecting the sorting criteria from the **Sort By** drop-down list. The sorting criteria are configured by your administrator.

7. To view the details of a product, click the corresponding *<short description of product (Product ID)>* hyperlink. Alternatively, click the product's image.

   The Product Details screen is displayed with the following information:

   - The description of the product.

   - The unit of measure defined for the product.

   - The **Overview** tab displays a summary of the product.

   - The **Specifications** tab displays the attributes and values associated with the attributes, and the physical dimensions associated with the product.

   - The **Components** tab displays the components of the product.

     Note: This tab is displayed only if the product is a bundle, physical kit, or logical kit. However, this tab is not displayed for a configurable bundle product that does not contain any configurations.

   - The **Variation Products** tab displays the details of the variations assigned to the product. A variation product is a product that is available in different variations. For example, a shirt may be available in different size variations, such as Extra Small, Small, Large, and Extra Large, and color variations, such as Black, White, and Red.

     To view the details of a product in different variations, select the appropriate attribute values assigned to the product. For example, to view the image of a Red color shirt in Large size, you can select the Red and Large attribute values. When you make your selections, only the attribute values that are available with the combination that you have already selected are enabled.

     Note: This tab is displayed only if the product is a variation product.

   - The **Cross-Sell** tab displays the details of the cross-sell products associated with the product. For example, if a DVD player has been associated with an LCD TV as a cross-sell product, the details of the DVD player are displayed.

     Note: This tab is displayed only if the product has any cross-sell products associated with it.

   - The **Up-Sell** tab displays the details of the up-sell products associated with the product. For example, if an LCD TV has been associated with a 21" TV as an up-sell product, the details of the LCD TV are displayed.

     Note: This tab is displayed only if the product has any up-sell products associated with it.

8. To view more images and additional information about the product, click the **More Images** hyperlink. Click **Close** to close the More Images dialog box to return to the Product Details screen.

9. To view a detailed description of the product, click the **More Details** hyperlink. A new browser window displays a detailed description of the product.

Note: * indicates that the field is mandatory.

10. Click **Close** to close the **Product Search** dialog box and return to the Quote Details screen.

Check Product Availability

To check the availability of a product:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

    - Click the **Find Quote** hyperlink.

    - In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

      If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

      However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following steps:

    - From the **Actions** drop-down list, select **Modify Quote**.

    - Click the **Edit** hyperlink in the **Lines** panel.

6. The Quote Details screen is displayed, with the **Products** tab highlighted. Click **Browse**.

   The **Product Search** page displays a list of all the available products in the catalog. If a product is configurable, the 🔧 **Product is configurable** is displayed. You can perform the following tasks:

    - To search for a product within the search results, click **Search in Results**, enter the appropriate keyword, and then click 🔍 .

    - You can browse for available products in a particular category or subcategories. By default, the **Browse Categories** panel in the **Product Search** page displays all the available product categories and subcategories, and the number of products available in each category. To view specific products available in a category, click the *<category>* hyperlink. The available products in a category are displayed in the **Search Results** panel.

      Note: To view the sub-categories, click 🔺.

    - You can sort the products displayed in the **Search Results** panel by selecting the sorting criteria from the **Sort By** drop-down list. The sorting criteria are configured by your administrator.

7. To check the product's availability, click the **Check Availability** hyperlink.

8. The **Product Availability** dialog box is displayed with the following details:

    - The short description of the product.

    - The requested quantity of the product.

    - The product's availability status.

9. Click **Close** to close the **Product Availability** dialog box and return to the Product Details screen.

   Note: The system checks whether the product is available, based on the minimum order quantity of the product configured by your administrator.

Add a Note to a Product in a Quote

Notes in a quote can be used as an information repository to track a quote through its life cycle, and for future references. You can add new notes to a product in a quote. For example, you can add an internal note describing a customer's feedback about the discounts offered on a product.

To add a note to a product in a quote:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

   ⬝ Click the **Find Quote** hyperlink.

   ⬝ In the **Search** box, enter the name of the quote as the search criteria and click 🔍. The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

   If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

   However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following tasks:

   ⬝ From the **Actions** drop-down list, select **Modify Quote**.

   ⬝ Click the **Edit** hyperlink in the **Lines** panel.

6. The Quote Details screen is displayed, with the **Products** tab highlighted. Perform either of the following tasks:

   ⬝ Click the **Quote Lines** tab to add notes to a quote product line.

   ⬝ Click the **Recommended Lines** tab to add notes to a recommended product line.

   Note: The **Recommended Lines** tab will be displayed or hidden based on the configuration.

7. A list of products in the quote is displayed. To narrow down the list of products displayed, perform the following steps:

   a. Click the **Show Filter Options** hyperlink.

   b. Select one of the following radio buttons:

   ⬝ **All Lines**: Select this to display all the products that match the search criteria.

   ⬝ **Problem Lines**: Select this to display only the products containing the products that match the search criteria and have failed validation.

▪ **Lines Pending Approval**: Select this to display only the products that match the search criteria and are pending approval.

c. (Optional) Enter the Product ID as the search criteria in the **Find Products Within Quote** box, and click 🔍.

The list of products that match the search criteria is displayed.

The total number of lines displayed on the page is displayed at the bottom of the page. By default, the first 100 lines are displayed. Click **Get More Records** to retrieve the next set of lines, and click **Get All Records** to retrieve all the lines that match the search criteria. You can sort the lines by the Line #, Product ID, and Quantity in either an ascending order or a descending order. For example, to sort the lines by Quantity in an ascending order, move the pointer over the **Quantity** column, click ▾, and select **Sort Ascending**.

Note: When you sort the lines, sorting is performed on the server side. Therefore, when you sort the lines, all the lines that match the search criteria are considered for sorting. If there are any unsaved changes in the lines, and you try to sort the lines, a warning message is displayed.

8. (Optional) To clear the filter options, click the **Hide And Clear Filter** hyperlink. If there are any unsaved changes in a quote product line or a recommended product line, a message asking you for confirmation is displayed. Perform either of the following tasks:

▪ Click **Yes** to proceed without saving the changes.

▪ Click **No** to close the message box and return to the Quote Details screen.

9. Select the check box adjacent to the corresponding product, and from the **More** drop-down list, select **View/Add Notes**. Alternatively, click 📝 adjacent to the corresponding product to which you want to add a note.

Note: The 📝 icon is displayed only if there are any notes added to the product.

10. The **Notes** dialog box is displayed. Perform the following steps:

▪ In the **Note Text** box, enter appropriate notes.

▪ From the **Note Type** drop-down list, select the note type for the note.

▪ Select the **For internal use only** check box to indicate that the note is meant for internal viewing only. If you select this check box, the note will be displayed only to internal users, and not to customers.

11. Click **Add Note**.

Note: It is mandatory that you enter the note text.

12. Click **Close** to close the **Notes** dialog box and return to the Quote Details screen.

Add a Related Product to a Quote

A related product is a product that is associated with another product by way of a predefined relationship. For example, a desktop computer can have a printer as a related product , with the printer defined as a cross-sell product for the desktop computer.

If a product in a quote has related products, you can add them to the quote as separate products. For example, if you have a quote with an LCD TV that has two related products, a DVD player and two speakers, you can add the DVD player as a separate product in the quote.

Note: A related product in a quote is always associated to a parent product. Therefore, if you delete the parent product from the quote or from the list of recommended products, the related product is also deleted.

To add a related product of a product to a quote:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

   - Click the **Find Quote** hyperlink.

   - In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

     If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

     However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following tasks:

   - From the **Actions** drop-down list, select **Modify Quote**.

   - Click the **Edit** hyperlink in the **Lines** panel.

6. The Quote Details screen is displayed, with the **Products** tab highlighted. Perform either of the following tasks:

   - Click the **Quote Lines** tab to add related products of a quote product line to the quote.

   - Click the **Recommended Lines** tab to add related products of a recommended product line to the quote.

     Note: The **Recommended Lines** tab will be displayed or hidden based on the configuration.

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7. A list of products in the selected quote is displayed. To narrow down the list of products displayed, perform the following steps:

   a. Click the **Show Filter Options** hyperlink.

   b. Select one of the following radio buttons:

      - **All Lines**: Select this to display all the products that match the search criteria.

      - **Problem Lines**: Select this to display only the products containing the products that match the search criteria and have failed validation.

      - **Lines Pending Approval**: Select this to display only the products that match the search criteria and are pending approval.

   c. (Optional) Enter the Product ID as the search criteria in the **Find Products Within Quote** box, and click 🔍.

      The list of products that match the search criteria is displayed.

   The total number of lines displayed on the page is displayed at the bottom of the page. By default, the first 100 lines are displayed. Click **Get More Records** to retrieve the next set of lines, and click **Get All Records** to retrieve all the lines that match the search criteria. You can sort the lines by the Line #, Product ID, and Quantity in either an ascending order or a descending order. For example, to sort the lines by Quantity in an ascending order, move the pointer over the **Quantity** column, click ▼, and select **Sort Ascending**.

   Note: When you sort the lines, sorting is performed on the server side. Therefore, when you sort the lines, all the lines that match the search criteria are considered for sorting. If there are any unsaved changes in the lines, and you try to sort the lines, a warning message is displayed.

8. (Optional) To clear the filter options, click the **Hide And Clear Filter** hyperlink. If there are any unsaved changes in a quote product line or a recommended product line, a message asking you for confirmation is displayed. Perform either of the following tasks:

   - Click **Yes** to proceed without saving the changes.

   - Click **No** to close the message box and return to the Quote Details screen.

9. Select a product whose related product you want to add to the quote, by selecting the corresponding check box.

10. From the **More** drop-down list, select **View Related Products**.

    The **Related Products** dialog box is displayed with a list of related products associated with the selected product.

11. Select the check box adjacent to the corresponding product and click **Add As Quote Line**.

12. Click **Close** to close the **Related Products** dialog box and return to the Quote Details screen.

13. Click **Save** in the Quote Details screen to save the quote.

Add a Related Product as a Recommended Product

A related product is a product that is associated with another product by way of a predefined relationship. For example, a desktop computer can have a printer as a related product, with the printer defined as a cross-sell product for the desktop computer.

If a product in a quote has related products, you can view those related products and add them to the list of recommended products. For example, let us suppose that you have a quote with an LCD TV that has two related products, a DVD player, and two speakers. If you want to recommend the DVD player to the customer, you can add the DVD player to the list of recommended products.

Note: A related product in a quote is always associated to a parent product. Therefore, if you delete the parent product from the quote or from the list of recommended products, the related product is also deleted.

To add a related product of a product as a recommended product:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

   - Click the **Find Quote** hyperlink.

   - In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

     If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

     However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following tasks:

   - From the **Actions** drop-down list, select **Modify Quote**.

   - Click the **Edit** hyperlink in the **Lines** panel.

6. The Quote Details screen is displayed, with the **Products** tab highlighted. Perform either of the following tasks:

   - Click the **Quote Lines** tab to add related products of a quote product line as a recommended product line.

   - Click the **Recommended Lines** tab to add related products of a recommended product line as a new recommended product line.

     Note: The **Recommended Lines** tab will be displayed or hidden based on the configuration.

7. A list of products in the quote is displayed. To narrow down the list of products displayed, perform the following steps:

   a. Click the **Show Filter Options** hyperlink.

   b. Select one of the following radio buttons:

      □ **All Lines**: Select this to display all the products that match the search criteria.

      □ **Problem Lines**: Select this to display only the products containing the products that match the search criteria and have failed validation.

      □ **Lines Pending Approval**: Select this to display only the products that match the search criteria and are pending approval.

   c. (Optional) Enter the Product ID as the search criteria in the **Find Products Within Quote** box, and click 🔍.

     The list of products that match the search criteria is displayed.

The total number of lines displayed on the page is displayed at the bottom of the page. By default, the first 100 lines are displayed. Click **Get More Records** to retrieve the next set of lines, and click **Get All Records** to retrieve all the lines that match the search criteria. You can sort the lines by the Line #, Product ID, and Quantity in either an ascending order or a descending order. For example, to sort the lines by Quantity in an ascending order, move the pointer over the **Quantity** column, click ▾, and select **Sort Ascending**.

Note: When you sort the lines, sorting is performed on the server side. Therefore, when you sort the lines, all the lines that match the search criteria are considered for sorting. If there are any unsaved changes in the lines, and you try to sort the lines, a warning message is displayed.

8. (Optional) To clear the filter options, click the **Hide And Clear Filter** hyperlink. If there are any unsaved changes in a quote product line or a recommended product line, a message asking you for confirmation is displayed. Perform either of the following tasks:

      □ Click **Yes** to proceed without saving the changes.

      □ Click **No** to close the message box and return to the Quote Details screen.

9. Select a product whose related product you want to add to the quote, by selecting the corresponding check box.

10. From the **More** drop-down list, select **View Related Products**.

The **Related Products** dialog box is displayed with a list of related products associated with the selected product.

11. Select the check box adjacent to the corresponding product and click **Add As Recommended Line**.

12. Click **Close** to close the **Related Products** dialog box and return to the Quote Details screen.

13. Click **Save** in the Quote Details screen to save the quote.

Configure or Reconfigure a Product in a Quote

A configurable product is a product that is available with different options. You can choose the options based on a customer's requirements. For example, a bicycle may be available with the following options: four types of frames and three types of wheels. A preconfigured product is a configurable product that has one or more options already configured for it. For example, a bicycle that is available with a particular type of frame and wheel. If a quote contains either a configurable product or a preconfigured product, you can either configure the product or change the configuration of the preconfigured product respectively. For example, if a customer is looking for a bicycle with a particular type of frame, you can configure the bicycle according to the customer's requirements before presenting the quote to the customer.

To configure or reconfigure a product:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

    ⌐ Click the **Find Quote** hyperlink.

    ⌐ In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

        If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

        However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

    Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following tasks:

    ⌐ From the **Actions** drop-down list, select **Modify Quote**.

    ⌐ Click the **Edit** hyperlink in the **Lines** panel.

6. The Quote Details screen is displayed, with the **Products** tab highlighted. Perform either of the following tasks:

    ⌐ Click the **Quote Lines** tab to configure or reconfigure a quote product line.

    ⌐ Click the **Recommended Lines** tab to configure or reconfigure a recommended product line.

        Note: The **Recommended Lines** tab will be displayed or hidden based on the configuration.

7. The list of products in the quote is displayed. To narrow down the list of products displayed, perform the following steps:

    a. Click the **Show Filter Options** hyperlink.

    b. Select one of the following radio buttons:

- **All Lines**: Select this to display all the products that match the search criteria.
- **Problem Lines**: Select this to display only the products containing the products that match the search criteria and have failed validation.
- **Lines Pending Approval**: Select this to display only the products that match the search criteria and are pending approval.

c. (Optional) Enter the Product ID as the search criteria in the **Find Products Within Quote** box, and click 🔍.

The list of products that match the search criteria is displayed.

The total number of lines displayed on the page is displayed at the bottom of the page. By default, the first 100 lines are displayed. Click **Get More Records** to retrieve the next set of lines, and click **Get All Records** to retrieve all the lines that match the search criteria. You can sort the lines by the Line #, Product ID, and Quantity in either an ascending order or a descending order. For example, to sort the lines by Quantity in an ascending order, move the pointer over the **Quantity** column, click ▼, and select **Sort Ascending**.

Note: When you sort the lines, sorting is performed on the server side. Therefore, when you sort the lines, all the lines that match the search criteria are considered for sorting. If there are any unsaved changes in the lines, and you try to sort the lines, a warning message is displayed.

8. (Optional) To clear the filter options, click the **Hide And Clear Filter** hyperlink. If there are any unsaved changes in a quote product line or a recommended product line, a message asking you for confirmation is displayed. Perform either of the following tasks:

- Click **Yes** to proceed without saving the changes.
- Click **No** to close the message box and return to the Quote Details screen.

9. Perform either of the following tasks:

- Click 🔧 adjacent to the product that you want to configure.
- Click 🔧 adjacent to the product that you want to reconfigure.

10. The **Product Configurator** dialog box, containing the available options, is displayed. Perform one of the following tasks:

- Select the appropriate options, and click **Save**.
- Select the appropriate options. Click **Review And Buy** and then click **Save**.

  Note: Either the **Save** button or the **Review And Buy** button is displayed based on the configuration.

11. The **Product Configurator** dialog box is closed. Click **Save** in the Quote Details screen.

Delete a Product from a Quote

You can delete a product from a quote. For example, a customer may have had a change of mind and may not want to purchase a particular product in which the customer had shown interest earlier. In such a scenario, you can delete the product from the quote before presenting the quote to the customer.

To delete a product from a quote:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

    - Click the **Find Quote** hyperlink.

    - In the **Search** box, enter the name of the quote as the search criteria and click 🔍. The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

      If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

      However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following tasks:

    - From the **Actions** drop-down list, select **Modify Quote**.

    - Click the **Edit** hyperlink in the **Lines** panel.

6. The Quote Details screen is displayed, with the **Products** tab highlighted. Perform either of the following steps:

    - Click the **Quote Lines** tab to delete a quote product line.

    - Click the **Recommended Lines** tab to delete a recommended product line.

      Note: The **Recommended Lines** tab will be displayed or hidden based on the configuration.

7. The list of products in the quote is displayed. To narrow down the list of products displayed, perform the following steps:

   a. Click the **Show Filter Options** hyperlink.

   b. Select one of the following radio buttons:

    - **All Lines**: Select this to display all the products that match the search criteria.

    - **Problem Lines**: Select this to display only the products containing the products that match the search criteria and have failed validation.

- **Lines Pending Approval**: Select this to display only the products that match the search criteria and are pending approval.

c. (Optional) Enter the Product ID as the search criteria in the **Find Products Within Quote** box, and click 🔍.

The list of products that match the search criteria is displayed.

The total number of lines displayed on the page is displayed at the bottom of the page. By default, the first 100 lines are displayed. Click **Get More Records** to retrieve the next set of lines, and click **Get All Records** to retrieve all the lines that match the search criteria. You can sort the lines by the Line #, Product ID, and Quantity in either an ascending order or a descending order. For example, to sort the lines by Quantity in an ascending order, move the pointer over the **Quantity** column, click ▾, and select **Sort Ascending**.

Note: When you sort the lines, sorting is performed on the server side. Therefore, when you sort the lines, all the lines that match the search criteria are considered for sorting. If there are any unsaved changes in the lines, and you try to sort the lines, a warning message is displayed.

8. (Optional) To clear the filter options, click the **Hide And Clear Filter** hyperlink. If there are any unsaved changes in a quote product line or a recommended product line, a message asking you for confirmation is displayed. Perform either of the following tasks:

- Click **Yes** to proceed without saving the changes.
- Click **No** to close the message box and return to the Quote Details screen.

9. Click 🗙 adjacent to the product that you want to delete. Alternatively, perform the following steps:

a. Select the check box adjacent to the products you want to delete.

b. From the **More** drop-down list, select **Delete**.

10. A message asking you for confirmation is displayed. Click **Yes**.

11. The product is no longer displayed in the list of products displayed under the **Products** tab. Click **Save**.

Note: If you do not click **Save**, the product will not be deleted from the quote.

Adjust the Quote Price

You can perform header-level pricing adjustments for a quote. For example, as part of the holiday season sale, you may want to offer a flat discount of $1,000 on a quote.

To adjust the quote price:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

    ι   Click the **Find Quote** hyperlink.

    ι   In the **Search** box, enter the name of the quote as the search criteria and click 🔍. The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

        If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

        However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

    Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following tasks:

    ι   From the **Actions** drop-down list, select **Modify Quote**.

    ι   Click the **Edit** hyperlink in the **Lines** panel.

    The Quote Details screen is displayed, with the **Products** tab highlighted.

6. Click **Adjust Price**.

    The **Adjust Price** dialog box displays a list of manual pricing rules, if any, applied to the quote.

    Note: An icon, 🔺 adjacent to a quote in the **Rule ID** column indicates that a manual pricing rule has not been applied to the quote. When you move the pointer over this icon, the reason for the adjustments not being applied is displayed.

    ι   To add a different pricing rule, select the manual pricing rule from the **Adjustment** drop-down list, and click **Add**. The pricing rule is added to the list. After you add a pricing rule, a default adjustment percentage is displayed in the **Adjustment** column for the newly added pricing rule.

        Note: You can add a manual pricing rule only once.

    ι   To modify the adjustment that is to be applied for a pricing rule, enter the appropriate absolute adjustment or percentage adjustment in the corresponding box under the **Adjustment** column.

    ι   In the box under the **Adjustment** column, enter the absolute adjustment or percentage adjustment to be applied under the pricing rule.

- To delete a pricing rule from the list, click adjacent to the pricing rule that you want to remove.

7. Click **Save** to save the changes and return to the Quote Details screen**.**

8. Click **Save** in the Quote Details screen to save the quote.

View the Quote Price for a Different Pricing Date

The pricing date of a quote is the date on which the quote is created. The quote price and the pricing adjustments applied to the quote may differ based on the pricing date. You can view the quote price and adjustments that are valid for a particular date by modifying the pricing date of the corresponding quote.

To view the quote price for a different pricing date by modifying the pricing date of the quote:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

   ᴸ Click the **Find Quote** hyperlink.

   ᴸ In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

   If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

   However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following tasks:

   ᴸ From the **Actions** drop-down list, select **Modify Quote**.

   ᴸ Click the **Edit** hyperlink in the **Lines** panel.

6. The Quote Details screen is displayed, with the **Products** tab highlighted. Select a different date from the calendar adjacent to the **Pricing Date** box. The initial pricing date of a quote is the date on which the quote is created.

7. Click **Save** to save the quote.

   The Quote Details screen is refreshed with the updated pricing information.

Define the Payment and Shipment Terms for a Quote

After a quote is created, you can define the payment and shipment terms that are bound to the quote. For example, you can specify the period within which the payment is to be made by the customer or the carrier service that will be used for fulfilling the products in the quote, if the quote is converted to an order.

To define the payment and shipment terms for a quote:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

   - Click the **Find Quote** hyperlink.

   - In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

     If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

     However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following tasks:

   - From the **Actions** drop-down list, select **Modify Quote**. The Quote Details screen is displayed. Click the **Terms** tab.

   - Click the **Edit** hyperlink in the **Terms** panel.

6. The Quote Details screen is displayed, with the **Terms** tab highlighted. Perform the following tasks:

   - From the **Payment Term** drop-down list, select the payment term to be applied to the quote. For example, Net 30, Net 10, and so on. The payment term is used to specify the time frame a customer is entitled to for paying the amount due if the quote is converted to an order.

   - From the **Carrier Service** drop-down list, select the carrier service to be used for the quote. For example, FedEx, UPS, and so on. The carrier service is the transportation service provider that will be used to deliver the products in the quote if the quote is converted to an order.

   - From the **Level of Service** drop-down list, select the level of service to be used for the quote. The level of service determines the way in which the order will be fulfilled if the quote is converted to an order. For example, you may choose to either have the products delivered using a normal speed carrier service or an express carrier service. Note that the shipping charges may differ based on the level of service you select.

   Select the requested delivery date for the quote from the calendar 🗓️ in the **Requested Delivery Date** field. The requested delivery date is the date on which the products in the quote have been requested for delivery. For example, a customer may want a certain product in the quote to be delivered on Christmas eve.

   In the **Shipment Instruction** box, enter the appropriate shipment instructions. For example, if the product is a fragile product, you can provide specific shipping instructions, saying that the container in which the product is being shipped must have a label reading FRAGILE, DO NOT DROP.

7. Click **Save** to save the quote.

Mark a Quote as the Primary Quote

An opportunity can contain multiple quotes. In such a scenario, you can define one of the quotes within an opportunity as a primary quote. You can, however, mark only one quote as a primary quote for an opportunity. The details of the primary quote is used for analysis and reporting, such as revenue forecasting.

Note: The first quote created is marked as the primary quote, by default.

To mark a quote as a primary quote:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

   - Click the **Find Quote** hyperlink.

   - In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

     If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

     However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. From the **Actions** drop-down list, select **Mark as Primary Quote**.

   The Quote Summary screen is refreshed, with the ✅ icon displayed to indicate that the quote is the primary quote.

Note: Once a quote is marked as the primary quote, you cannot change it to a non-primary quote. To change a primary quote to a non-primary quote, you must mark another quote as the primary quote.

Request Approval for a Quote

You can present a quote to a customer only if the quote is in the **Approved** status. You can place a request for a quote to be approved. After you place a request for approval of a quote, the quote is automatically approved if the quote does not require any approval. If the quote requires approval, the quote must be approved by the approvers before it can be presented to a customer.

An approval is required for a quote if any or all of the following conditions are met:

- Any of the products in a quote fails validation. For example, a product in a quote may fail validation because the quantity of the product is either less than the minimum order quantity or more than the maximum order quantity configured for that product.

- Any of the products in a quote violates an approval rule. For example, let us suppose that an approval rule has been configured such that the quote requires approval every time the expiration date of the quote is modified. In such a scenario, if you modify the expiration date of the quote, the quote must be approved by an approver before you can present it to a customer.

- The adjustments applied to a quote or any of the products in a quote under a manual pricing rule exceed the maximum discount limit configured for a rule. For example, if the maximum discount limit configured for a 32" LCD television under a manual pricing rule is 5%, and you offer a discount of 7% to a customer, the quote must be approved before you can present it to the customer.

If a product in a quote fails validation, the ![icon] icon is displayed under the **Product** column in the Quote Details screen, with the tooltip indicating that the product has failed validation. For example, if a quote contains a product line with quantity less than the minimum order quantity configured for the product, you cannot present the quote to a customer until the quote is approved by an approver.

If the adjustments applied to any of the products in a quote exceed the maximum limit that is allowed under a pricing rule, the ![icon] icon is displayed under the **Adjustment** column in the Quote Details screen, with the tooltip indicating that approval is required for the line. For example, let us suppose that the maximum discount that can be applied to an LCD television under a pricing rule is 5%. During the process of negotiations with a customer, you may offer a 7% discount. In such a scenario, you must send the quote for approval to your approver.

Note: Ensure that you have made all the necessary modifications to the quote before sending the quote for approval. After a quote is sent for approval, you cannot perform any modifications to the quote.

To request approval for a quote:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

   - Click the **Find Quote** hyperlink.

- In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

  If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

  However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. From the **Actions** drop-down list**,** select **Request Approval**.

6. The Quote Summary screen is refreshed, and -

   - If the quote does not require approval, the status of the quote is changed to **Approved**.

   - If the quote requires approval, the Approvals screen is displayed. The 🔒 icon is displayed adjacent to the **Status** field to indicate that the quote is pending approval.

Accept an Approval Request for a Quote

If a quote is pending your approval, you must accept the approval request so that it be can presented to a customer. A quote can be presented to a customer only after it has been approved by all the approvers defined in the approval plan.

To accept an approval request for a quote:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

    ☐ Click the **Find Quote** hyperlink.

    ☐ In the **Search** box, enter the name of the quote as the search criteria and click 🔍. The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

    If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

    However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

    Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. From the **Actions** drop-down list, select **View Approvals**.

6. The Approvals screen is displayed. The 🔒 icon is displayed adjacent to the **Status** field to indicate that the quote is pending approval. Click **Approve**.

    The Approvals screen is refreshed. If the quote does not require any other approval, the status is changed to **Approved**.

Reject an Approval Request for a Quote

If a quote is pending your approval, you can reject the request for approval if you do not want the quote to be presented to a customer in its current form. For example, if the discount offered for a product exceeds the maximum discount allowed for that product by more than 50%, and you do not want to approve the discount offered, you can reject the approval request.

To reject an approval request for a quote:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

    - Click the **Find Quote** hyperlink.

    - In the **Search** box, enter the name of the quote as the search criteria and click 🔍. The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

      If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

      However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. From the **Actions** drop-down list, select **View Approvals**.

6. The Approvals screen is displayed. The 🔒 icon is displayed adjacent to the **Status** field to indicate that the quote is pending approval. Click **Reject**.

7. The **Reject Reason** dialog box is displayed. In the **Provide a reject reason*** box, enter appropriate notes. For example, you can enter notes to explain why you are rejecting the quote, such as close of a promotional offer.

8. Click **Confirm**.

   The **Reject Reason** dialog box is closed and the Approvals screen is displayed. The ⊗ is displayed adjacent to the **Status** field to indicate that the request for approval of the quote has been rejected.

Note: * indicates that the field is mandatory.

View the Details of a Line Violating a Manual Pricing Rule

You can view the details of the line-level violations for a quote. For example, if you are an approver, you may want to see the details of the violations before approving or rejecting the quote because you want to verify whether the discount that has been offered is justified or not.

To view the details of a line violating a pricing rule:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

   ꞏ Click the **Find Quote** hyperlink.

   ꞏ In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

      If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

      However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. From the **Actions** drop-down list, select **View Approvals**.

6. The Approvals screen is displayed, with the **Approval Trail** panel displaying the list of approvers for the quote. Perform the following steps:

   a. To view the details of the violations that have to be approved by a user, click the corresponding row.

   b. A **Violations That Require Approval** panel is displayed to the right, displaying the list of header-level and line-level rule violations that have to be approved by the corresponding user.

Click the ***<line-level rule violation>*** hyperlink to view the details of all the lines for the corresponding violation.

The **Violations That Require Approval** dialog box displays the details of the rule and the lines that have violated that rule. You can view the following information:

- The **Lines Violating Rule** panel displays the details of the lines that have violated the rule, such as the unit price of the products, the adjustments applied to the products, and so on.

- The **Other Violations** panel displays the other rule violations that have to be approved by the user. Click the ***<line-level rule violation>*** hyperlink to view the details of the rule and the lines that have violated that rule.

- The **Line Pricing Summary** panel displays the price summary of a line that you select in the **Lines Violating Rule** panel. You can view the adjustments applied to the line, line total, profit margin, and so on.

c. Click **Close** to close the **Violations That Require Approval** dialog box and return to the Approvals screen.

Generate a Proposal

You can generate a proposal from a quote and present it to a customer. For example, you may want to print a quote as a proposal in PDF format and e-mail it to the customer as an attachment. You can also choose the quote attributes to be included in the proposal.

To generate a proposal:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

    ᵣ   Click the **Find Quote** hyperlink.

    ᵣ   In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

       If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

       However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. From the **Actions** drop-down list, select **Generate Proposal**. Alternatively, if the quote is in the **Approved** status, perform the following steps:

   a. From the **Actions** drop-down list, select **Send to Customer**.

   b. The Send To Customer screen is displayed. Click the **Generate Proposal** hyperlink.

6. The Generate Proposal screen is displayed. Perform the following tasks:

   a. From the **Choose a print template*** drop-down list, select the template to be used for generating the proposal.

   b. From the **Choose a print format*** drop-down list, select the format in which the proposal is to be printed.

   c. In the **Proposal Title*** box, enter a title for the proposal.

   d. In the **Salutation*** box, enter the salutation that you want to use to address the customer contact, for example, Mr, Miss, and so on. When the proposal is generated, the salutation is followed by the customer contact's first name and last name.

   e. In the **Opening Comments*** box, enter the opening comments, for example, a few words explaining the purpose of the proposal.

   f. In the **Closing Comments*** box, enter the closing comments, for example, Thank you, Looking forward to hearing from you, and so on.

g. In the **Complimentary Closing*** box, enter the words you want to end the proposal with, for example, Sincerely, Truly, and so on.

h. Select the **Show minor lines in quote** check box to include the components of a bundle product in the proposal.

i. In the **Include In Print** panel, select the attributes that you want included in the proposal by selecting the corresponding check boxes.

Note: * indicates that the field is mandatory.

7. Click **Generate**.

8. A new and empty browser window is displayed. Close the empty browser window.

9. Based on the configuration performed by your administrator, you can perform one of the following tasks:

    - Print the proposal directly from the printer.

    - View the proposal in the format that has been configured.

    - Save the proposal to a specific location.

View Quote Summary

You can search for a quote and view the following information in the Quote Summary screen:

- Quote header-level information
- Customer details
- Pricing summary
- Payment and shipment terms
- Quote lines
- Notes

To view a quote summary:

1. Click the **Sterling Quotes** tab in the menu bar.
2. The Quote Home page is displayed. Perform either of the following steps:

    - Click the **Find Quote** hyperlink.

    - In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

        If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

        However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.
4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

The Quote Summary screen is displayed. The following table describes the fields displayed in the Quote Summary screen:

Field	Description
<Customer information or customer contact information, including name, phone number, and e-mail address>	The details of the customer contact are displayed, including the name, phone number, and e-mail address.

Field	Description
Status	The status of the quote. A quote can be in one of the following statuses:
	◆ Created - This indicates that the quote has been created.
	Note: If a quote is pending approval, the icon is displayed to indicate that the quote has been put on hold. If the request for approval of a quote has been rejected by an approver, the icon is displayed.
	◆ Approved - This indicates that the quote has been approved.
	◆ Presented - This indicates that the quote has been presented to the customer.
	◆ Accepted - This indicates that the quote has been accepted by the customer.
	◆ Rejected - This indicates that the quote has been rejected by the customer.
	◆ Ordered - This indicates that the quote has been converted to an order.
	◆ Abandoned - This indicates that the quote has been abandoned.
Quote ID	The unique identifier of the quote.
Opportunity Name	The name of the opportunity with which the quote is associated.
Expiration Date	The date by which the quote will expire. If the expiration date is not specified before the quote is presented to the customer, the icon is displayed. When you move the pointer over this icon, the following message is displayed:
	"If sent to the customer today, this date will be <*current date + Default Expiration Period (Number Of Days) rule*>"
Pricing Date	The pricing date of the quote. The prices of the products in the quote are calculated based on this date.
An icon along with a text indicator for the primary quote	Identifies whether the quote is a primary quote or not.

Additionally, you can view the following information:

- In the **Customer** panel, you can view the following information:
  - **Contact Address**: The sold to address of the customer contact for which the quote has been created.
  - **Shipping Address**: The ship to address of the customer contact for which the quote has been created.

  Note: If the customer is a business customer, the name of the company is displayed.

- In the **Pricing Summary** panel, you can view the following information:
  - **Line Sub Total**: The sub total of the quote's price.
  - **Adjustments**: The adjustments applied to the quote.
  - **Shipping**: The shipping costs of the quote.
  - **Taxes**: The tax amount applied to the quote.

- **Total**: The quote's total. This is the total amount that will be charged to the customer after taking into account all the adjustments, charges, and taxes applied to the quote.
- **Profit Margin**: The profit margin that will be earned from the quote if the quote is converted to an order. This is displayed as a percentage. For example, a profit margin of 20% means a profit of $20 from every $100 that is earned from the quote.

- In the **Terms** panel, you can view the following information:
  - **Payment Term**: The payment term to be used for the quote. The payment term is used to specify the time frame a customer is entitled to for paying the amount due if the quote is converted to an order.
  - **Requested Delivery Date**: The requested delivery date for the quote. The requested delivery date is the date on which the products in the quote have been requested for delivery. For example, a customer may want a certain product in the quote to be delivered on Christmas eve.
  - **Carrier**: The carrier service to be used for the quote. The carrier service is the transportation service provider that will be used to deliver the products in the quote if the quote is converted to an order.
  - **Level of Service**: The level of service for the quote. The level of service determines the way in which the order will be fulfilled if the quote is converted to an order. For example, you may choose to either have the products delivered using a normal speed carrier service or an express carrier service. Note that the shipping charges may differ based on the level of service you select.
- In the **Lines** panel, you can view all the products in the quote along with the quantity and line total.
- In the **Notes** panel, you can view the notes added to the quote.

Present a Quote to a Customer

You can present a quote to a customer after you have defined the quote details, such as the products and their quantity, the price of the products, the pricing adjustments, and so on. You can present a quote to a customer only if it is in the **Approved** status.

To present a quote to a customer:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

    ▫ Click the **Find Quote** hyperlink.

    ▫ In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

      If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

      However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

    Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. From the **Actions** drop-down list, select **Send to Customer**.

6. The Send To Customer screen is displayed. In the **Note Text*** box, a note is displayed by default. Modify the note or enter additional notes, as required.

    Note: * indicates that the field is mandatory.

7. Click **Confirm**. The Quote Summary screen is refreshed, with the status of the quote displayed as **Presented**.

After a quote is presented to a customer, the customer may either accept the quote or reject the quote. You can accept the quote or reject the quote on the customer's behalf.

See also:

- Accept a Quote on Behalf of a Customer
- Reject a Quote on Behalf of a Customer

Accept a Quote on Behalf of a Customer

You can accept a quote on behalf of a customer. For example, a customer may agree to all the conditions laid down in a quote, and may want the quote to be processed so that the customer can place an order for the products in the quote.

To accept a quote on behalf of a customer:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

    *   Click the **Find Quote** hyperlink.

    *   In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

        If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

        However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

    Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. From the **Actions** drop-down list, select **Accept**.

6. The Accept For Customer screen is displayed. In the **Note Text*** box, a note is displayed by default. Modify the note or enter additional notes, as required.

    Note: * indicates that the field is mandatory.

7. Click **Confirm**. The Quote Summary screen is refreshed, with the status of the quote displayed as **Accepted**.

After a quote is accepted, you can convert the quote to an order so that an order can be placed for the products in the quote and the order can be fulfilled.

Reject a Quote on Behalf of a Customer

After a quote has been presented to a customer, you can reject the quote on behalf of the customer. For example, if a customer wants to reject a quote based on the quote price, you can reject the quote on the customer's behalf.

To reject a quote on behalf of a customer:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

   - Click the **Find Quote** hyperlink.

   - In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

     If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

     However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. From the **Actions** drop-down list, select **Reject**.

6. The Reject For Customer screen is displayed. In the **Note Text*** box, a note is displayed by default. Modify the note or enter additional notes, as required.

   Note: * indicates that the field is mandatory.

7. Click **Confirm**. The Quote Summary screen is refreshed, with the status of the quote displayed as **Rejected**.

After a quote is rejected, you must rework the quote if you want to present the quote again. For example, you may want to modify the quote price in order to present a customer with a better price for the products in the quote.

Convert a Quote to an Order

After a quote has been accepted by a customer, you can convert the quote to an order so that the order can be fulfilled.

Note: You can convert a quote to an order only after the quote has been accepted by a customer.

Before converting a quote to an order, you can perform only the following modifications:

To...	Click...
Add a new payment method	Add a New Payment Method
Delete a payment method	Delete a Payment Method
Modify the amount to be charged	Modify the Amount to be Charged to Credit Card or Customer Account
Add a note	Add a Note

To convert a quote to an order:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

   ‣ Click the **Find Quote** hyperlink.

   ‣ In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

     If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

     However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. From the **Actions** drop-down list, select **Convert to Order**.

6. The Convert to Order screen is displayed with the following information:

   ‣ The header panel displays the quote header information, such as the quote name, expiration date, and so on.

   ‣ The **Payment Information** panel displays the quote's total and the remaining amount due from the customer.

   ‣ The **Pricing Summary** panel displays the quote's subtotal, adjustments applied to the quote, shipping costs, and so on.

- The **Billing Address** panel displays the Bill To address for the quote.
- The **Shipping Address** panel displays the Ship To address for the quote.

7. Review the details. You can perform either of the following tasks:

- Convert the quote to an order without making any changes to the quote details, by clicking **Confirm**.
- Modify the details before converting the quote to an order.

8. If any amount is due from the customer, and a payment method has not been specified for this, a message asking for confirmation is displayed. Click **Yes**.

The Quote Summary screen is displayed, with the status of the quote displayed as **Ordered**.

Notes:

- If the address information in the quote is not valid, the Quote Details screen is displayed. An error message is displayed, indicating that you must provide a valid address to convert the quote to an order.
- If any pending amount is due from the customer, and a payment method has not been specified for this, the order will be created with the **Payment Information** panel displaying the **Await Payment Information** status.

Add a New Payment Method

You can add a different payment method to a quote before converting the quote to an order. You can either select an existing payment method or create a new payment method. For example, you can add a credit card payment method and specify that $500 be charged to the credit card.

To add a new payment method:

1. In the Convert to Order screen, under the **Payment Methods** panel, click **Add**.
2. The **Payment Method** dialog box is displayed. Perform either of the following steps:

- From the **Existing Method** drop-down list, select a payment method from the drop-down list. This drop-down list displays the payment methods available for the customer. After the payment method is selected, the details of the payment method are automatically populated.

◦ Select the payment type from the **Payment Type*** drop-down list. Enter the details of the payment method, as appropriate, based on the payment type selected, as described in the following table:

Payment Type	Description
Credit Card	◆ From the **Credit Card Type*** drop-down list, select the type of credit card, for example, VISA, MasterCard, and so on. ◆ In the **Name On Card*** box, perform either of the following steps: - If a single box is displayed, enter the name of the credit card holder as displayed on the credit card. - If two boxes are displayed, enter the first name and the last name of the credit card holder as displayed on the credit card. ◆ In the **Credit Card No*** box, enter the credit card number. ◆ From the **Expiration Date*** drop-down lists, select the expiration month and expiration year of the credit card. ◆ To define a different billing address for the credit card, click the **Edit** hyperlink in the **Billing Address** panel.
Customer Account	In the **Customer Account No*** box, enter the account number of the customer to which the amount will be charged.
Other	In the **Payment Reference1***, **Payment Reference2**, and **Payment Reference3** boxes, enter the payment reference number information.
Gift Card	◆ In the **SVC Card #*** box, enter the stored value card number. In the **Payment Reference1**, **Payment Reference2**, and **Payment Reference3** boxes, enter the payment reference number information.
Store Value Card	◆ In the **SVC Card #*** box, enter the stored value card number. In the **Payment Reference1**, **Payment Reference2**, and **Payment Reference3** boxes, enter the payment reference number information.

Note: * indicates that the field is mandatory.

3. Click **Confirm**.

Delete a Payment Method

When converting a quote to an order, you can delete a payment method that has been added to the quote. For example, after specifying that $500 be charged to the customer's credit card, if the customer has a change of mind and wants to provide a check to pay, you can delete the credit card.

To delete a payment method:

1. In the Convert to Order screen, under the **Payment Methods** panel, click ✖ corresponding to the payment method you want to delete. The payment method is no longer displayed in the list of payment methods.

2. Click **Confirm**.

Modify the Amount to be Charged to Credit Card or Customer Account

When converting a quote to an order, you can modify the amount that will be charged to the customer's credit card or customer account. That is, if you want to increase or decrease the amount to be charged to the customer's credit card or customer account, you can modify the amount accordingly.

To modify the amount to be charged:

1. In the Convert to Order screen, under the **Payment Methods** panel, modify the amount to be charged to the corresponding credit card or customer account, as appropriate.

2. Click **Confirm**.

Add a Note

Notes can be used as an information repository to track a quote through its life cycle, and can be used for future references. When converting a quote to an order, you can add a note to the quote and the order. For example, you can add a note, explaining the actions that have taken place in the quote. The note that you add will be added to the order.

To add a note:

1. In the Convert to Order screen, click the **View/Add Notes** hyperlink.

2. The **Notes** dialog box is displayed. Perform the following tasks:

    ᴸ In the **Note Text** box, enter appropriate notes.

    ᴸ From the **Note Type** drop-down list, select the note type for the note.

    ᴸ Select the **For internal use only** check box to indicate that the note is meant for internal viewing only. If you select this check box, the note will be displayed only to internal users, and not to customers.

3. Click **Add Note**.

    Note: It is mandatory that you enter the note text.

4. Click **Close** to close the **Notes** dialog box and return to the Convert to Order screen.

See also:

🖘 View the Notes Added to a Quote

Search for a Quote

You can search for a quote and view the details of the quote. As a field sales representative, you may want to see the details of a quote, such as, the expiry date of the quote, products in the quote, payment and shipment terms and other relevant details.

You can use either of the following options to search for quotes:

- Quick Search
- Advanced Search

Quick Search

Quick search is a simple search that can be used to quickly browse for quotes in the system. You cannot use additional search criteria or sort search results.

To use the quick search:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Sterling Quotes home page is displayed. In the **Search** text box, enter either the complete name of the quote, if known, or one or more characters of the name as the search criteria.

   Note: The search is not case sensitive.

3. Click 🔍.

   The Quick Search Results screen is displayed with the following information:

   - Name of the Quote

   - Customer **Name**: Customer details of the quote

   - **Owner**: User ID of the person who created the quote

   - **Status**: Status of the quote. For example, created, accepted, rejected or approved. Quotes pending approval are indicated by an icon.

   - **Expiration Date**: Expiry date of the quote.

4. To view the details of a quote, click the **Quote Name** hyperlink.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed

Advanced Search

Advanced search allows you to browse for specific quotes by using additional search criteria, such as, expiry date of the quote, unfinished quotes, or customer ID. You can also sort the search results using the **Advanced Search** option.

To use advanced search:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Click the **Find Quote** hyperlink.

3. The Quote Search screen is displayed. Enter the search criteria, as appropriate:

    ·   Select the **Show only unfinished quotes** check box to search for quotes that have neither been abandoned nor converted to an order.

    ·   In the **Quote Name** field, select the appropriate operator from the drop-down list, and enter the appropriate value in the corresponding box. For example, to search for a quote whose name is ComputerSystems, you can select **starts with** from the drop-down list and enter Computer in the corresponding box.

    ·   Click 🔍 in the **Customer ID** field to browse for customer for whom the quote was created. The **Customer Search** dialog box is displayed. Enter the other search criteria as appropriate and click **Search**.

        A list of customers matching the search criteria is displayed in the **Search Results** panel. Select the check box adjacent to the customer, and click **Select**. Alternatively, double-click the row containing the Customer ID or click the corresponding Customer ID hyperlink to select the customer. The Customer ID of the customer is populated in the **Customer ID** box.

    ·   In the **Quote ID Starts With** box, enter the complete identifier of the quote or the initials of the quote identifier. If you are searching for a quote with quote123abc as the Quote ID, you can enter quote123 in the box.

    ·   In the **E-mail Starts With** box, enter the complete e-mail address or the initials of the e-mail address of the customer contact for the quote.

    ·   In the **First Name Starts With** box, enter the complete first name or the initials of the first name of the customer contact for the quote.

    ·   In the **Day Phone** field, select an operator from the drop-down list and enter the complete phone number or the partial phone number of the customer contact in the corresponding box.

    ·   In the **Last Name Starts With** box, enter the complete last name or the initials of the last name of the customer contact for the quote. For example, if the last name of the customer contact is Thomas, you can enter Thom in the box.

    ·   In the **Expiration Date** field, select an operator from the drop-down list and select an appropriate date from the calendar 📅 . The expiration date is the date by which the quote will expire.

        Note: If the expiration date of a quote is not specified before the quote is presented to the customer, the expiration date is computed by the system. The computed expiration date is not considered when you search for a quote with that expiration date as the criteria.

4. You can display the search results in either an ascending or descending order. To sort the search results, select the desired option from the **Sort By** drop-down list.

5. Click **Search.**

    A list of quotes that match the search criteria are displayed in the **Search Results** panel. By default, a maximum of 15 quotes are displayed. If the search results exceed 15, they span across pages. You can configure the number of results to be displayed.

    ·   To modify the number of quotes to be displayed in the **Search Results** panel, select a number from the **Results Per Page** drop-down list. The display of search results is modified accordingly.

- Use the arrow keys to navigate between pages.

6. To view the details of a quote, click the **Quote Name** hyperlink.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

Rework a Quote

After a quote is presented to a customer, the customer can either accept or reject the quote. The customer may reject the quote because the customer does not agree to the price of some of the products. After a customer rejects a quote, you can rework the quote, modify its details, and then present it to the customer.

To rework a quote:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

   * Click the **Find Quote** hyperlink.

   * In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

     If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

     However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. From the **Actions** drop-down list, select **Rework Quote**.

6. The Rework Quote screen is displayed. In the **Additional Notes** box, enter appropriate notes.

7. Click **Confirm**.

   The Quote Summary screen is refreshed, with the status of the quote displayed as **Created**.

See also:

* Add a Product to a Quote
* Adjust the Price of Multiple Products in a Quote
* View the Quote Price for a Different Pricing Date
* View the Notes Added to a Product in a Quote
* Add a Related Product to a Quote

* Adjust the Price of a Product in a Quote
* Adjust the Quote Price
* Modify a Product's Quantity in a Quote
* Add a Note to a Product in a Quote
* Add a Related Product as a Recommended Product

- Add a Product to a Quote
- Adjust the Price of Multiple Bundle Components in a Quote
- Delete a Product from a Quote

- Adjust the Price of a Product in a Quote
- Configure or Reconfigure a Product in a Quote
- Define the Payment and Shipment Terms for a Quote

Create an Alternative Quote

You can create an alternative quote within an opportunity by copying an existing quote. Alternative quotes are quotes that exist simultaneously and are associated with a single opportunity. After copying a quote, you can modify the product information, and the shipment and payment terms for the new quote. For example, let us suppose that you have a quote, Quote-A, for two desktop computers on which you have offered a discount of 5%. To provide another option to your customer, you can create an alternative quote, Quote-B, for one desktop computer and one laptop, on which you offer a discount of 6%. You can create Quote-B by copying Quote-A and modifying the product information accordingly.

You can create an alternative quote by copying an existing quote from either the Opportunity Details screen or the Quote Summary screen.

To create an alternative quote:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

    ◦ Click the **Find Quote** hyperlink.

    ◦ In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

      If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

      However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. From the **Actions** drop-down list, select **Copy as Alternative Quote**.

6. The **Enter Quote Name** dialog box is displayed. In the **Quote Name*** box, enter a name for the new quote.

   Note: * indicates that the field is mandatory.

7. Click **Save**. The **Enter Quote Name** dialog box is closed and the Quote Details screen of the newly created quote is displayed.

After the alternative quote is created, you can perform the following tasks:

- Add a Product to a Quote
- Adjust the Price of Multiple Products in a Quote
- View the Quote Price for a Different Pricing Date
- View the Notes Added to a Product in a Quote
- Add a Related Product to a Quote
- Adjust the Price of Multiple Bundle Components in a Quote
- Delete a Product from a Quote

- Adjust the Price of a Product in a Quote
- Adjust the Quote Price
- Modify a Product's Quantity in a Quote
- Add a Note to a Product in a Quote
- Add a Related Product as a Recommended Product
- Configure or Reconfigure a Product in a Quote
- Define the Payment and Shipment Terms for a Quote

View Alternative Quotes

Alternative quotes are quotes that are independent of each other, but are associated with a single opportunity. Alternative quotes are used to present different options to a customer. A customer can, however, accept only one option. For example, if a customer is looking at purchasing kitchen appliances, you can present the following quotes as alternatives:

- Quote1: One microwave oven at 5% discount and one coffee maker at 10% discount
- Quote2: One microwave oven at 10% discount, one dishwasher at 5% discount, and one sandwich toaster and one coffee maker at 5% discount each

To view the alternative quotes for an opportunity:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

   - Click the **Find Quote** hyperlink.

   - In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

     If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

     However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. From the **Actions** drop-down list, select **View Alternative Quotes**.

6. The View Alternative Quotes screen displays the list of alternative quotes available for the quote along with the current quote. In the **Quotes** panel, click the Quote Name hyperlink to view the details of a quote.

   The Quote Summary screen pertaining to the quote you selected is displayed.

Modify Quote Name and Expiration Date for a Quote

After a quote is created, you can modify the quote name and the expiration date of the quote, which is the date on which the quote will expire.

To modify the quote name and expiration date:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

    ᴸ Click the **Find Quote** hyperlink.

    ᴸ In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

    If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

    However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

    Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following tasks:

    ᴸ From the **Actions** drop-down list, select **Modify Quote**. The Quote Details screen is displayed. Click the **Customer** tab.

    ᴸ Click the **Edit** hyperlink in the **Customer** panel.

6. The Quote Details screen is displayed, with the **Customer** tab highlighted. In the **Primary Information** panel under the **Customer** tab, perform the following tasks:

    ᴸ In the **Name*** box, enter a name for the quote.

    ᴸ Select an expiry date for the quote from the calendar 🗓 in the **Expiration Date** field.

    Note: If you do not select a date, the expiration date of the quote is automatically computed based on the configuration.

7. Click **Save** to save the quote.

    Note: * indicates that the field is mandatory.

Modify Payment and Shipment Terms for a Quote

After you have created a quote, you can modify the payment terms and shipment terms in a quote in the Quote Details screen.

To modify the payment and shipping terms for a quote:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

   ↳ Click the **Find Quote** hyperlink.

   ↳ In the **Search** box, enter the name of the quote as the search criteria and click 🔍. The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

   If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

   However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following tasks:

   ↳ From the **Actions** drop-down list, select **Modify Quote**. The Quote Details screen is displayed. Click the **Terms** tab.

   ↳ Click the **Edit** hyperlink in the **Terms** panel. The Quote Details screen is displayed, with the **Terms** tab highlighted.

6. Modify the following fields, as required:

Field	Description
Payment Terms	The payment term to be applied on the quote, for example, Net 30, Net 10, and so on. The payment term is used to specify the time frame a customer is entitled to for paying the amount due if the quote is converted to an order.
Carrier	The carrier service that is to be used for the quote, for example, FedEx, UPS, and so on. The carrier service is the transportation service provider that will be used to deliver the products in the quote if the quote is converted to an order.
Level of Service	The level of service determines the way in which the order will be fulfilled if the quote is converted to an order. For example, you may choose to either have the products delivered using a normal speed carrier service or an express carrier service. Note that the shipping charges may differ based on the level of service you select.

Field	Description
Requested Delivery Date	The requested delivery date is the date on which the products in the quote have been requested for delivery. For example, a customer may want a certain product in the quote to be delivered on Christmas eve.
Shipment Instruction	The instructions to be followed when the products in the quote are being shipped. For example, if the product is a fragile product, you can provide specific shipping instructions, stating that the container in which the product is being shipped must have a label reading FRAGILE, DO NOT DROP.

7. Click **Save** to save the quote.

Modify a Product's Quantity

After you have added a product to a quote, you can modify the quantity of the product depending on customer's requirement.

To modify a product's quantity:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

   - Click the **Find Quote** hyperlink.

   - In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

     If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

     However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following tasks:

   - From the **Actions** drop-down list, select **Modify Quote**. From the Quote Details screen that is displayed, click the **Products** tab.

   - Click the **Edit** hyperlink in the **Lines** panel.

6. The Quote Details screen is displayed, with the **Products** tab highlighted. Click the **Quote Lines** tab to modify the quantity of a quote product line.

7. A list of products in the quote is displayed. To narrow down the list of products displayed, perform the following steps:

   a. Click the **Show Filter Options** hyperlink.

   b. Select one of the following radio buttons:

   - **All Lines**: Select this to display all the products that match the search criteria.

   - **Problem Lines**: Select this to display only the products containing the products that match the search criteria and have failed validation.

   - **Lines Pending Approval**: Select this to display only the products that match the search criteria and are pending approval.

c. (Optional) Enter the Product ID as the search criteria in the **Find Products Within Quote** box, and click 🔍 .

The list of products that match the search criteria is displayed.

The total number of lines displayed on the page is displayed at the bottom of the page. By default, the first 100 lines are displayed. Click **Get More Records** to retrieve the next set of lines, and click **Get All Records** to retrieve all the lines that match the search criteria. You can sort the lines by the Line #, Product ID, and Quantity in either an ascending order or a descending order. For example, to sort the lines by Quantity in an ascending order, move the pointer over the **Quantity** column, click ▼ , and select **Sort Ascending**.

Note: When you sort the lines, sorting is performed on the server side. Therefore, when you sort the lines, all the lines that match the search criteria are considered for sorting. If there are any unsaved changes in the lines, and you try to sort the lines, a warning message is displayed.

8. (Optional) To clear the filter options, click the **Hide And Clear Filter** hyperlink. If there are any unsaved changes in a quote product line or a recommended product line, a message asking you for confirmation is displayed. Perform either of the following tasks:

▫ Click **Yes** to proceed without saving the changes.

▫ Click **No** to close the message box and return to the Quote Details screen.

9. In the **Quantity** column, enter the appropriate quantity for the corresponding product.

10. Click **Save** to save the quote.

The Quote Details screen is refreshed, and the modified quantity is displayed along with the modified adjustments and quote total.

Move a Product to the Recommended Lines in a Quote

A quote can have quote products and recommended products. Recommended products are products that you recommend to a customer in addition to the list of products a customer has requested. You can move a product in a quote to the list of products you want to recommend to the customer.

To move a product to the list of recommended products:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

   □ Click the **Find Quote** hyperlink.

   □ In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

   If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

   However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following tasks:

   □ From the **Actions** drop-down list, select **Modify Quote**.

   □ Click the **Edit** hyperlink in the **Lines** panel.

6. The Quote Details screen is displayed, with the **Products** tab highlighted. Click the **Quote Lines** tab.

7. The list of products in the quote is displayed. To narrow down the list of products displayed, perform the following steps:

   a. Click the **Show Filter Options** hyperlink.

   b. Select one of the following radio buttons:

   □ **All Lines**: Select this to display all the products that match the search criteria.

   □ **Problem Lines**: Select this to display only the products containing the products that match the search criteria and have failed validation.

   □ **Lines Pending Approval**: Select this to display only the products that match the search criteria and are pending approval.

c. (Optional) Enter the Product ID as the search criteria in the **Find Products Within Quote** box, and click 🔍 .

The list of products that match the search criteria is displayed.

The total number of lines displayed on the page is displayed at the bottom of the page. By default, the first 100 lines are displayed. Click **Get More Records** to retrieve the next set of lines, and click **Get All Records** to retrieve all the lines that match the search criteria. You can sort the lines by the Line #, Product ID, and Quantity in either an ascending order or a descending order. For example, to sort the lines by Quantity in an ascending order, move the pointer over the **Quantity** column, click ▾ , and select **Sort Ascending**.

Note: When you sort the lines, sorting is performed on the server side. Therefore, when you sort the lines, all the lines that match the search criteria are considered for sorting. If there are any unsaved changes in the lines, and you try to sort the lines, a warning message is displayed.

8. (Optional) To clear the filter options, click the **Hide And Clear Filter** hyperlink. If there are any unsaved changes in a quote product line or a recommended product line, a message asking you for confirmation is displayed. Perform either of the following tasks:

    ▪ Click **Yes** to proceed without saving the changes.

    ▪ Click **No** to close the message box and return to the Quote Details screen.

9. Select the check boxes adjacent to the products that you want to move to the list of recommended products.

10. From the **More** drop-down list**,** click **Move To Recommended Lines**.

The selected product is automatically moved to the list of recommended products, and is no longer displayed in the list of products under the **Quote Lines** tab.

Note: The **Move To Recommended Lines** menu option is displayed or hidden based on the configuration.

11. Click **Save** to save the quote.

Move a Recommended Product to a Quote

A quote can have quote products and recommended products. Recommended products are products that you recommend to a customer in addition to the list of products a customer has requested. You can move a recommended product to a quote. For example, after adding a television to a quote, you recommend a home theater to the customer. If the customer accepts the recommendation, you can move the home theater to the quote.

To move a recommended product to a quote:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

    ▫ Click the **Find Quote** hyperlink.

    ▫ In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

       If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

       However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

    Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following tasks:

    ▫ From the **Actions** drop-down list, select **Modify Quote**.

    ▫ Click the **Edit** hyperlink in the **Lines** panel.

6. The Quote Details screen is displayed, with the **Products** tab highlighted. Click the **Recommended Lines** tab.

    Note: The **Recommended Lines** tab is displayed or hidden based on the configuration.

7. The list of recommended products is displayed. To narrow down the list of products displayed, perform the following steps:

    a. Click the **Show Filter Options** hyperlink.

    b. Select one of the following radio buttons:

    ▫ **All Lines**: Select this to display all the products that match the search criteria.

    ▫ **Problem Lines**: Select this to display only the products containing the products that match the search criteria and have failed validation.

    ▫ **Lines Pending Approval**: Select this to display only the products that match the search criteria and are pending approval.

c. (Optional) Enter the Product ID as the search criteria in the **Find Products Within Quote** box, and click 🔍.

The list of products that match the search criteria is displayed.

The total number of lines displayed on the page is displayed at the bottom of the page. By default, the first 100 lines are displayed. Click **Get More Records** to retrieve the next set of lines, and click **Get All Records** to retrieve all the lines that match the search criteria. You can sort the lines by the Line #, Product ID, and Quantity in either an ascending order or a descending order. For example, to sort the lines by Quantity in an ascending order, move the pointer over the **Quantity** column, click ▾, and select **Sort Ascending**.

Note: When you sort the lines, sorting is performed on the server side. Therefore, when you sort the lines, all the lines that match the search criteria are considered for sorting. If there are any unsaved changes in the lines, and you try to sort the lines, a warning message is displayed.

8. (Optional) To clear the filter options, click the **Hide And Clear Filter** hyperlink. If there are any unsaved changes in a quote product line or a recommended product line, a message asking you for confirmation is displayed. Perform either of the following tasks:

  ▫ Click **Yes** to proceed without saving the changes.

  ▫ Click **No** to close the message box and return to the Quote Details screen.

9. Select the check boxes adjacent to the products that you want to move to the list of recommended products.

10. From the **More** drop-down list**,** click **Move To Quote Lines**.

The selected product is moved to the quote, and is no longer displayed in the list of products under the **Recommended Lines** tab.

11. Click **Save** to save the quote.

Adjust the Price of a Product in a Quote

You can adjust the price of a product in a quote by adding a new pricing rule, removing an existing pricing rule, or modifying the amount to be discounted from the price as part of a pricing rule. For example, let us suppose that you have applied a pricing rule to a product under which a customer gets a discount of $100 if the customer buys three of those products. If you want to increase the discount to $110, you can adjust the price of the product accordingly.

You can adjust the price of both a quote line and a recommended line.

To adjust the price of a product in a quote:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

    - Click the **Find Quote** hyperlink.

    - In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

      If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

      However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

    Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following tasks:

    - From the **Actions** drop-down list, select **Modify Quote**.

    - Click the **Edit** hyperlink in the **Lines** panel.

6. The Quote Details screen is displayed, with the **Products** tab highlighted. Perform either of the following tasks:

    - Click the **Quote Lines** tab to adjust the price of a quote product line.

    - Click the **Recommended Lines** tab to adjust the price of a recommended product line.

      Note: The **Recommended Lines** tab is displayed or hidden based on the configuration.

7. The list of products in the quote is displayed. To narrow down the list of products displayed, perform the following steps:

    a. Click the **Show Filter Options** hyperlink.

    b. Select one of the following radio buttons:

    - **All Lines**: Select this to display all the products that match the search criteria.

- **Problem Lines**: Select this to display only the products containing the products that match the search criteria and have failed validation.

- **Lines Pending Approval**: Select this to display only the products that match the search criteria and are pending approval.

c. (Optional) Enter the Product ID as the search criteria in the **Find Products Within Quote** box, and click 🔍.

The list of products that match the search criteria is displayed.

The total number of lines displayed on the page is displayed at the bottom of the page. By default, the first 100 lines are displayed. Click **Get More Records** to retrieve the next set of lines, and click **Get All Records** to retrieve all the lines that match the search criteria. You can sort the lines by the Line #, Product ID, and Quantity in either an ascending order or a descending order. For example, to sort the lines by Quantity in an ascending order, move the pointer over the **Quantity** column, click ▼, and select **Sort Ascending**.

Note: When you sort the lines, sorting is performed on the server side. Therefore, when you sort the lines, all the lines that match the search criteria are considered for sorting. If there are any unsaved changes in the lines, and you try to sort the lines, a warning message is displayed.

8. (Optional) To clear the filter options, click the **Hide And Clear Filter** hyperlink. If there are any unsaved changes in a quote product line or a recommended product line, a message asking you for confirmation is displayed. Perform either of the following tasks:

- Click **Yes** to proceed without saving the changes.

- Click **No** to close the message box and return to the Quote Details screen.

9. Click the **Modify** hyperlink displayed in the **Adjustment** column to adjust the price for a product line.

Note: The **Modify** hyperlink is displayed only if a manual pricing rule has been added to the product line. If a manual pricing rule has not been applied to the product line, the 🖼️ icon is displayed under the corresponding **Rule ID** column. When you move the pointer over this icon, the reason for the adjustments not being applied is displayed.

10. The **Adjust Line Price** dialog box displays the list of manual pricing rules applied to the product line. Perform any of the following tasks:

- To add a different pricing rule, select the manual pricing rule from the **Adjustment** drop-down list, and click **Add**. The pricing rule is added to the list. After you add a pricing rule, a default adjustment percentage is displayed in the **Adjustment** column for the newly added pricing rule.

  Note: You can add a manual pricing rule only once.

- To modify the adjustment that is to be applied for a pricing rule, enter the appropriate absolute adjustment or percentage adjustment in the corresponding box under the **Adjustment** column.

- In the box under the **Adjustment** column, enter the absolute adjustment or percentage adjustment to be applied under the pricing rule.

- To delete a pricing rule from the list, click ✖️ adjacent to the pricing rule that you want to remove.

- Click **Save** to save the changes and return to the Quote Details screen.

11. Click **Save**.

   The Quote Details screen is displayed with the updated pricing adjustments.

View the Approval Summary of a Quote

You can view the approval summary of a quote that is pending approval. The approval summary displays the list of violations that require your approval. Additionally, if a quote requires approval from multiple approvers, you can view the approval status against each approver. For example, if a quote requires approval from the Sales Lead and the Sales Manager, in the Sales department, and the head of the Legal department, you can view the status of the approval against each of these three users.

To view the quote approval summary:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

   ˪ Click the **Find Quote** hyperlink.

   ˪ In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

   If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

   However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. From the **Actions** drop-down list, select **View Approvals**.

   The Approvals screen is displayed. The following table describes the fields displayed in the **Approvals** panel of the Approvals screen:

Field	Description
<Customer information or customer contact information, including name, phone number, and e-mail address>	The details of the customer contact are displayed, including the name, phone number, and e-mail address.

Field	Description
Status	The status of the quote. A quote can be in one of the following statuses:
	◆ Created - This indicates that the quote has been created.
	Note: If a quote is pending approval, the ![icon] icon is displayed to indicate that the quote has been put on hold. If the request for approval of a quote has been rejected by an approver, the ![icon] icon is displayed.
	◆ Approved - This indicates that the quote has been approved.
	◆ Presented - This indicates that the quote has been presented to the customer.
	◆ Accepted - This indicates that the quote has been accepted by the customer.
	◆ Rejected - This indicates that the quote has been rejected by the customer.
	◆ Ordered - This indicates that the quote has been converted to an order.
	◆ Abandoned - This indicates that the quote has been abandoned.
Opportunity Name	The name of the opportunity with which the quote is associated.

Additionally, you can view the following information:

- In the **Approval Trail** panel, you can view the list of approvers who are involved in the approval process and the status of the approval for each approver. If you are an approver for the quote, the row containing your name and team is automatically selected, and a panel is displayed with the list of violations that you have already approved or have to approve.

- In the **Pricing Summary** panel, you can view the following information:
  - Line Sub Total: The quote's line subtotal.
  - Adjustments: The price adjustments applied to the quote.
  - Shipping: The shipping costs of the quote.
  - Taxes: The tax amount applied to the quote.
  - Total: The quote's total. This is the total amount that will be charged from the customer after taking into account all the adjustments, charges, and taxes applied to the quote.
  - Profit Margin: The profit margin that will be earned from the quote if the quote is converted to an order. This is displayed as a percentage. For example, a profit margin of 20% means a profit of $20 from every $100 that is earned from the quote.

- In the **Notes** panel, you can view the notes that have been added to the quote.

View the Notes Added to a Quote

Notes in a quote can be used as an information repository to track a quote through its life cycle, and can be used for future references. If notes have already been added to a quote, you can view those notes.

You can view the notes added to a quote when performing any of the following tasks:

- Viewing the quote summary
- Modifying the quote details
- Viewing the approval summary
- Presenting a quote to a customer
- Viewing alternative quotes
- Generating a Proposal
- Reworking a quote
- Converting a quote to an order
- Abandoning a quote

This topic describes how to view the notes added to a quote when viewing the quote summary or modifying the details of a quote.

To view the notes added to a quote:

1. Click the **Sterling Quotes** tab in the menu bar.
2. The Quote Home page is displayed. Perform either of the following steps:
   - Click the **Find Quote** hyperlink.
   - In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

     If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

     However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.
3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.
4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.
5. The Quote Summary screen is displayed. Perform any one of the following tasks:
   - Click the **View/Add Notes** hyperlink.
   - From the **Actions** drop-down list, select **Modify Quote**. In the Quote Details screen, click the **View/Add Notes** hyperlink.

6. The **Notes** dialog box displays the notes that have been added so far. To filter the notes that you want to view, perform the following steps:

- Select the note type from the **Filter by Note Type*** drop-down list to display only the notes of a particular note type. For example, select **All** from the drop-down list to view all the notes.

- Select the **Show System Generated Notes** check box to display the notes that are automatically generated by the system.

7. Click **Close** to close the **Notes** dialog box.

View the Notes Added to a Product in a Quote

Notes in a quote can be used as an information repository to track a quote through its life cycle, and for future references. You can view the notes that have been added to a product in a quote.

To view the notes that have been added to a product in a quote:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

    ⫶ Click the **Find Quote** hyperlink.

    ⫶ In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

    If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

    However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

    Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following tasks:

    ⫶ From the **Actions** drop-down list, select **Modify Quote**. From the Quote Details screen that is displayed, click the **Products** tab. The Quote Details screen is displayed, with the **Products** tab highlighted.

    ⫶ Click the **Edit** hyperlink in the **Lines** panel. The Quote Details screen is displayed, with the **Products** tab highlighted.

6. Perform either of the following steps:

    ⫶ Click the **Quote Lines** tab to view the notes added to a quote product line.

    ⫶ Click the **Recommended Lines** tab to view the notes added to a recommended product line.

    Note: The **Recommended Lines** tab is displayed or hidden based on the configuration.

7. The list of products in the quote is displayed. To narrow down the list of products displayed, perform the following steps:

    a. Click the **Show Filter Options** hyperlink.

    b. Select one of the following radio buttons:

    ⫶ **All Lines**: Select this to display all the products that match the search criteria.

    ⫶ **Problem Lines**: Select this to display only the products containing the products that match the search criteria and have failed validation.

ᴸ **Lines Pending Approval**: Select this to display only the products that match the search criteria and are pending approval.

c. (Optional) Enter the Product ID as the search criteria in the **Find Products Within Quote** box, and click 🔍.

The list of products that match the search criteria is displayed.

The total number of lines displayed on the page is displayed at the bottom of the page. By default, the first 100 lines are displayed. Click **Get More Records** to retrieve the next set of lines, and click **Get All Records** to retrieve all the lines that match the search criteria. You can sort the lines by the Line #, Product ID, and Quantity in either an ascending order or a descending order. For example, to sort the lines by Quantity in an ascending order, move the pointer over the **Quantity** column, click ▼, and select **Sort Ascending**.

Note: When you sort the lines, sorting is performed on the server side. Therefore, when you sort the lines, all the lines that match the search criteria are considered for sorting. If there are any unsaved changes in the lines, and you try to sort the lines, a warning message is displayed.

8. (Optional) To clear the filter options, click the **Hide And Clear Filter** hyperlink. If there are any unsaved changes in a quote product line or a recommended product line, a message asking you for confirmation is displayed. Perform either of the following tasks:

ᴸ Click **Yes** to proceed without saving the changes.

ᴸ Click **No** to close the message box and return to the Quote Details screen.

9. Select the check box adjacent to the corresponding product, and from the **More** drop-down list click **View/Add Notes**. Alternatively, click 📝 adjacent to the corresponding product for which you want to view the notes.

Note: The 📝 icon is displayed only if there are any notes added to the product.

10. The **Notes** dialog box displays the notes that have been added to the product so far. To filter the notes you want to view, perform the following steps:

ᴸ Select the note type from the **Filter by Note Type*** drop-down list to display only the notes of a particular note type. For example, select **All** from the drop-down list to view all the notes.

ᴸ Select the **Show System Generated Notes** check box to display the notes that are automatically generated by the system.

11. Click **Close** to close the **Notes** dialog box.

The Quote Details screen is displayed.

View List of Products from Opportunity Screen

You can view the list of products that have been added to an opportunity and its associated quotes using the **Opportunities** tab. You can view the products added to a quote when viewing the details of that opportunity.

To view the list of products from the Opportunity screen:

1. Click the **Opportunities** tab in the menu bar.

2. The Opportunities Home page displays the list of available opportunities. Click the corresponding opportunity name hyperlink.

   The details of the opportunity are displayed, with the list of products listed in the **Products** related list. By default, the **Products** related list displays a maximum of 5 products. If there are more than 5 products, you can perform either of the following steps to view the remainder of the products:

   · Click the **Show** *<number of products>* **more** hyperlink. The next set of a maximum of 5 products is displayed in addition to the original list.

   · Click the **Go to list** hyperlink. The list of all the available products is displayed.

   Note: The products listed in the **Products** related list correspond only to the products in the primary quote for the selected opportunity. Note that the products in the non-primary quotes are not listed in the **Products** related list.

Abandon a Quote

If you feel that a quote no longer serves a purpose, you can abandon the quote. For example, if a quote is no longer applicable to your customer due to changed customer's preferences, you may abandon the quote as it is no longer applicable.

Note: After a quote has been abandoned, you cannot perform any modifications to the quote.

To abandon a quote:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

    - Click the **Find Quote** hyperlink.

    - In the **Search** box, enter the name of the quote as the search criteria and click 🔍. The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

      If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

      However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

    Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. From the **Actions** drop-down list, select **Abandon Quote**.

6. The Abandon Quote screen is displayed. Perform the following steps:

    - From the **Abandon Reason*** drop-down list, select a reason for abandoning the quote. The reason is used to determine why you want to abandon the quote. For example, you can select **Duplicate** reason if the quote has been duplicated.

    - In the **Note Text*** box, a note is displayed by default. Modify the note or enter additional notes, as required. For example, you can enter notes to elaborate on the events that led to the quote being abandoned.

    Note: * indicates that the field is mandatory.

7. Click **Confirm**.

    The Quote Summary screen is displayed, with the status of the quote changed to **Abandoned**.

Adjust the Price of Multiple Products in a Quote

You can adjust the price of multiple products in a quote by specifying new pricing rules for the products. For example, you might want to offer a discount of 5% on all the products in the quote as part of a promotional offer.

Note: When you adjust the price of multiple products in a quote, you can neither view nor remove any of the pricing rules that were applied to the products earlier.

To adjust the price of multiple products in a quote:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

   ﹍ Click the **Find Quote** hyperlink.

   ﹍ In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

   If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

   However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following tasks:

   ﹍ From the **Actions** drop-down list, select **Modify Quote**. From the Quote Details screen that is displayed, click the **Products** tab.

   ﹍ Click the **Edit** hyperlink in the **Lines** panel.

6. The Quote Details screen is displayed, with the **Products** tab highlighted. Perform either of the following steps:

   ﹍ Click the **Quote Lines** tab to adjust the price of multiple quote product lines.

   ﹍ Click the **Recommended Lines** tab to adjust the price of multiple recommended product lines.

   Note: The **Recommended Lines** tab is displayed or hidden based on the configuration.

7. The list of products in the quote is displayed. To narrow down the list of products displayed, perform the following steps:

   a. Click the **Show Filter Options** hyperlink.

   b. Select one of the following radio buttons:

   ﹍ **All Lines**: Select this to display all the products that match the search criteria.

- **Problem Lines**: Select this to display only the products containing the products that match the search criteria and have failed validation.

- **Lines Pending Approval**: Select this to display only the products that match the search criteria and are pending approval.

c. (Optional) Enter the Product ID as the search criteria in the **Find Products Within Quote** box, and click 🔍.

The list of products that match the search criteria is displayed.

The total number of lines displayed on the page is displayed at the bottom of the page. By default, the first 100 lines are displayed. Click **Get More Records** to retrieve the next set of lines, and click **Get All Records** to retrieve all the lines that match the search criteria. You can sort the lines by the Line #, Product ID, and Quantity in either an ascending order or a descending order. For example, to sort the lines by Quantity in an ascending order, move the pointer over the **Quantity** column, click ▼, and select **Sort Ascending**.

Note: When you sort the lines, sorting is performed on the server side. Therefore, when you sort the lines, all the lines that match the search criteria are considered for sorting. If there are any unsaved changes in the lines, and you try to sort the lines, a warning message is displayed.

8. (Optional) To clear the filter options, click the **Hide And Clear Filter** hyperlink. If there are any unsaved changes in a quote product line or a recommended product line, a message asking you for confirmation is displayed. Perform either of the following tasks:

- Click **Yes** to proceed without saving the changes.

- Click **No** to close the message box and return to the Quote Details screen.

9. Select the check boxes corresponding to the products for which you want to adjust the price.

10. Click **Add Line Adjustment**.

11. The **Add Line Adjustment** dialog box is displayed. Perform the following steps:

a. From the **Adjustment** drop-down list, select the manual pricing rule, and click **Add**.

Note: You can add a manual pricing rule only once.

b. In the box under the **Adjustment** column, enter the absolute adjustment or percentage adjustment to be applied to the products.

c. Click **Save** to save the changes, and close the **Add Line Adjustment** dialog box.

12. Click **Save**.

The Quote Details screen is displayed with the updated pricing adjustments.

Adjust the Price of a Bundle Component in a Quote

A bundle product is a product comprising multiple products. A bundle comprises a parent product and one or more component products. You can view the components of a bundle product in a quote and adjust the price of the component products. For example, let us suppose that you have a home theater system comprising a DVD player, a woofer, and two speakers. If you want to increase the discount offered on the speakers by 5% because the customer has insisted that the quote will not be accepted unless you increase the discount, you can adjust the price of the speakers accordingly.

To adjust the price of a bundle component in a quote:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

    ‣ Click the **Find Quote** hyperlink.

    ‣ In the **Search** box, enter the name of the quote as the search criteria and click 🔍. The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

       If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

       However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following tasks:

    ‣ From the **Actions** drop-down list, select **Modify Quote**. From the Quote Details screen that is displayed, click the **Products** tab.

    ‣ Click the **Edit** hyperlink in the **Lines** panel. The Quote Details screen is displayed, with the **Products** tab highlighted.

6. Perform either of the following tasks:

    ‣ Click the **Quote Lines** tab to adjust the price of the bundle components of a quote product line.

    ‣ Click the **Recommended Lines** tab to adjust the price of the bundle components of a recommended product line.

       Note: The **Recommended Lines** tab is displayed or hidden based on the configuration.

7. The list of products in the quote is displayed. To narrow down the list of products displayed, perform the following steps:

    a. Click the **Show Filter Options** hyperlink.

    b. Select one of the following radio buttons:

- **All Lines**: Select this to display all the products that match the search criteria.
- **Problem Lines**: Select this to display only the products containing the products that match the search criteria and have failed validation.
- **Lines Pending Approval**: Select this to display only the products that match the search criteria and are pending approval.

c. (Optional) Enter the Product ID as the search criteria in the **Find Products Within Quote** box, and click 🔍.

The list of products that match the search criteria is displayed.

The total number of lines displayed on the page is displayed at the bottom of the page. By default, the first 100 lines are displayed. Click **Get More Records** to retrieve the next set of lines, and click **Get All Records** to retrieve all the lines that match the search criteria. You can sort the lines by the Line #, Product ID, and Quantity in either an ascending order or a descending order. For example, to sort the lines by Quantity in an ascending order, move the pointer over the **Quantity** column, click ▼, and select **Sort Ascending**.

Note: When you sort the lines, sorting is performed on the server side. Therefore, when you sort the lines, all the lines that match the search criteria are considered for sorting. If there are any unsaved changes in the lines, and you try to sort the lines, a warning message is displayed.

8. (Optional) To clear the filter options, click the **Hide And Clear Filter** hyperlink. If there are any unsaved changes in a quote product line or a recommended product line, a message asking you for confirmation is displayed. Perform either of the following tasks:

- Click **Yes** to proceed without saving the changes.
- Click **No** to close the message box and return to the Quote Details screen.

9. Click ▦ adjacent to the product for which you want to adjust the price of component products.

Note: The ▦ icon is displayed only if the product is a bundle product.

10. The **Component Pricing** dialog box displays the details of the parent product and its components, such as the quantity, line total, unit price, and so on. Click the **Modify** hyperlink displayed under the **Adjustment** column to adjust the price of a product line.

Notes:

- The unit price of the parent product and its components is displayed based on the bundle pricing strategy that has been configured for the product. The unit price is displayed as follows:

  - If the bundle pricing strategy has been configured such that the price of the bundle product is calculated based on both the parent product and its component products, the unit price of the parent product is displayed along with the sum of the unit price of the components in the **Parent** panel.

  - If the bundle pricing strategy has been configured such that the price of the bundle product is calculated based only on the parent product, only the unit price of the parent product is displayed in the **Parent** panel. In this scenario, the unit price and the line total of the product lines are not displayed.

- The **Modify** hyperlink is displayed only if a manual pricing rule has been added to the product line.

11. The **Adjust Line Price** dialog box is displayed, showing the list of manual pricing rules applied to the product line.

    Note: If a manual pricing rule has not been applied to the product line, the icon is displayed under the corresponding **Rule ID** column. When you move the pointer over this icon, the reason for the adjustments not being applied is displayed.

    Perform any of the following tasks, and click **Save**:

    · To add a different pricing rule, select the manual pricing rule from the **Adjustment** drop-down list, and click **Add**. The pricing rule is added to the list. After you add a pricing rule, a default adjustment percentage is displayed in the **Adjustment** column for the newly added pricing rule.

        Note: You can add a manual pricing rule only once.

    · To modify the adjustment that is to be applied for a pricing rule, enter the appropriate absolute adjustment or percentage adjustment in the corresponding box under the **Adjustment** column.

    · In the box under the **Adjustment** column, enter the absolute adjustment or percentage adjustment to be applied under the pricing rule.

    · To delete a pricing rule from the list, click adjacent to the pricing rule that you want to remove.

12. Click **Close** to close the **Component Pricing** dialog box.

13. Click **Save**.

Adjust the Price of Multiple Bundle Components in a Quote

A bundle product is a product comprising multiple products. A bundle comprises a parent product and one or more component products. You can view the components of a bundle product in a quote and adjust the price of the components.

To adjust the price of multiple bundle components in a quote:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

   ⸽ Click the **Find Quote** hyperlink.

   ⸽ In the **Search** box, enter the name of the quote as the search criteria and click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

   If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

   However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following tasks:

   ⸽ From the **Actions** drop-down list, select **Modify Quote**. From the Quote Details screen that is displayed, click the **Products** tab.

   ⸽ Click the **Edit** hyperlink in the **Lines** panel.

6. The Quote Details screen is displayed, with the **Products** tab highlighted. Perform either of the following tasks:

   ⸽ Click the **Quote Lines** tab to adjust the price of the bundle components of a quote product line.

   ⸽ Click the **Recommended Lines** tab to adjust the price of the bundle components of a recommended product line.

   Note: The **Recommended Lines** tab is displayed or hidden based on the configuration.

7. The list of products in the quote is displayed. To narrow down the list of products displayed, perform the following steps:

   a. Click the **Show Filter Options** hyperlink.

   b. Select one of the following radio buttons:

   ⸽ **All Lines**: Select this to display all the products that match the search criteria.

- **Problem Lines**: Select this to display only the products containing the products that match the search criteria and have failed validation.

- **Lines Pending Approval**: Select this to display only the products that match the search criteria and are pending approval.

c. (Optional) Enter the Product ID as the search criteria in the **Find Products Within Quote** box, and click 🔍.

The list of products that match the search criteria is displayed.

The total number of lines displayed on the page is displayed at the bottom of the page. By default, the first 100 lines are displayed. Click **Get More Records** to retrieve the next set of lines, and click **Get All Records** to retrieve all the lines that match the search criteria. You can sort the lines by the Line #, Product ID, and Quantity in either an ascending order or a descending order. For example, to sort the lines by Quantity in an ascending order, move the pointer over the **Quantity** column, click ▾, and select **Sort Ascending**.

Note: When you sort the lines, sorting is performed on the server side. Therefore, when you sort the lines, all the lines that match the search criteria are considered for sorting. If there are any unsaved changes in the lines, and you try to sort the lines, a warning message is displayed.

8. (Optional) To clear the filter options, click the **Hide And Clear Filter** hyperlink. If there are any unsaved changes in a quote product line or a recommended product line, a message asking you for confirmation is displayed. Perform either of the following tasks:

- Click **Yes** to proceed without saving the changes.

- Click **No** to close the message box and return to the Quote Details screen.

9. Click 🔳 adjacent to the product for which you want to adjust the price of component products.

Note: The 🔳 icon is displayed only if the product is a bundle product.

10. The **Component Pricing** dialog box displays the details of the parent product and its components, such as the quantity, line total, unit price, and so on. Select the check boxes corresponding to the products for which you want to adjust the price and click **Add Line Adjustment**.

Notes:

- The unit price of the parent product and its components is displayed based on the bundle pricing strategy that has been configured for the product. The unit price is displayed as follows:

  - If the bundle pricing strategy has been configured such that the price of the bundle product is calculated based on both the parent product and its component products, the unit price of the parent product is displayed along with the sum of the unit price of the components in the **Parent** panel.

  - If the bundle pricing strategy has been configured such that the price of the bundle product is calculated based only on the parent product, only the unit price of the parent product is displayed in the **Parent** panel. In this scenario, the unit price and the line total of the product lines are not displayed.

- The **Add Line Adjustment** button is enabled only if the bundle pricing strategy for the parent product has been configured such that the price of the bundle product is calculated based only on the component products or both the parent product and its component products.

11. The **Add Line Adjustment** dialog box is displayed, showing the list of manual pricing rules applied to the products. Perform any of the following tasks, and click **Save**:

  * To add a different pricing rule, select the manual pricing rule from the **Adjustment** drop-down list, and click **Add**. The pricing rule is added to the list. After you add a pricing rule, a default adjustment percentage is displayed in the **Adjustment** column for the newly added pricing rule.

    Note: You can add a manual pricing rule only once.

  * To modify the adjustment that is to be applied for a pricing rule, enter the appropriate absolute adjustment or percentage adjustment in the corresponding box under the **Adjustment** column.

  * In the box under the **Adjustment** column, enter the absolute adjustment or percentage adjustment to be applied under the pricing rule.

  * To delete a pricing rule from the list, click adjacent to the pricing rule that you want to remove.

12. Click **Close** to close the **Component Pricing** dialog box.

13. Click **Save**.

Add a Note to a Bundle Component in a Quote

A bundle product is a product comprising multiple products. A bundle comprises a parent product and one or more component products. You can add notes to the components of a bundle product in a quote.

To add a note to a bundle component in a quote:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

    ⸱ Click the **Find Quote** hyperlink.

    ⸱ In the **Search** box, enter the name of the quote as the search criteria and click 🔍. The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

      If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

      However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following tasks:

    ⸱ From the **Actions** drop-down list, select **Modify Quote**. From the Quote Details screen that is displayed, click the **Products** tab.

    ⸱ Click the **Edit** hyperlink in the **Lines** panel.

6. The Quote Details screen is displayed, with the **Products** tab highlighted. Perform either of the following steps:

    ⸱ Click the **Quote Lines** tab to add notes to the bundle components of a quote product line.

    ⸱ Click the **Recommended Lines** tab to add notes to the bundle components of a recommended product line.

      Note: The **Recommended Lines** tab will be displayed or hidden based on the configuration.

7. The list of products in the quote is displayed. To narrow down the list of products displayed, perform the following steps:

    a. Click the **Show Filter Options** hyperlink.

    b. Select one of the following radio buttons:

    ⸱ **All Lines**: Select this to display all the products that match the search criteria.

    ⸱ **Problem Lines**: Select this to display only the products containing the products that match the search criteria and have failed validation.

- **Lines Pending Approval**: Select this to display only the products that match the search criteria and are pending approval.

c. (Optional) Enter the Product ID as the search criteria in the **Find Products Within Quote** box, and click 🔍.

The list of products that match the search criteria is displayed.

The total number of lines displayed on the page is displayed at the bottom of the page. By default, the first 100 lines are displayed. Click **Get More Records** to retrieve the next set of lines, and click **Get All Records** to retrieve all the lines that match the search criteria. You can sort the lines by the Line #, Product ID, and Quantity in either an ascending order or a descending order. For example, to sort the lines by Quantity in an ascending order, move the pointer over the **Quantity** column, click ▼, and select **Sort Ascending**.

Note: When you sort the lines, sorting is performed on the server side. Therefore, when you sort the lines, all the lines that match the search criteria are considered for sorting. If there are any unsaved changes in the lines, and you try to sort the lines, a warning message is displayed.

8. (Optional) To clear the filter options, click the **Hide And Clear Filter** hyperlink. If there are any unsaved changes in a quote product line or a recommended product line, a message asking you for confirmation is displayed. Perform either of the following tasks:

- Click **Yes** to proceed without saving the changes.

- Click **No** to close the message box and return to the Quote Details screen.

9. Click ⊞ adjacent to the product to whose bundle component you want to add notes.

Note: The ⊞ icon is displayed only if the product is a bundle product.

10. The **Component Pricing** dialog box displays the details of the product, which is the bundle parent, and its components, such as the quantity, line total, unit price, and so on. Select the check box adjacent to the corresponding component product, and from the **More** drop-down list select **View/Add Notes**.

Alternatively, click 📝 adjacent to the corresponding component product to which you want to add a note.

Note: The 📝 icon is displayed only if there are any notes added to the component product.

11. The **Notes** dialog box is displayed. Perform the following steps:

- In the **Note Text** box, enter appropriate notes.

- From the **Note Type** drop-down list, select the note type for the note.

- Select the **For internal use only** check box to indicate that the note is meant for internal viewing only. If you select this check box, the note will be displayed only to internal users, and not to customers.

12. Click **Add Note**.

Note: It is mandatory that you enter the note text.

13. Click **Close** to close the **Notes** dialog box and return to the **Component Pricing** dialog box.

14. Click **Close** to close the **Component Pricing** dialog box and return to the Quote Details screen.

View the Notes Added to a Bundle Component in a Quote

A bundle product is a product comprising multiple products. A bundle comprises a parent product and one or more component products. You can view the notes added to the components of a bundle product in a quote.

To view the notes added to a bundle component in a quote:

1. Click the **Sterling Quotes** tab in the menu bar.

2. The Quote Home page is displayed. Perform either of the following steps:

   ˪ Click the **Find Quote** hyperlink.

   ˪ In the **Search** box, enter the name of the quote as the search criteria and click 🔍. The Quick Search Results screen displays a maximum of 10 quotes matching the search criteria.

     If the quote that you are searching for is displayed in the **Matches on Quotes** panel, click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed. In this scenario, ignore steps 3 and 4.

     However, if the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**.

3. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**.

4. The quotes matching the search criteria are displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row.

   Note: If only one quote matches the search criteria, the details of the corresponding quote are automatically displayed.

5. The Quote Summary screen is displayed. Perform either of the following tasks:

   ˪ From the **Actions** drop-down list, select **Modify Quote**. From the Quote Details screen that is displayed, click the **Products** tab.

   ˪ Click the **Edit** hyperlink in the **Lines** panel.

6. The Quote Details screen is displayed, with the **Products** tab highlighted. Perform either of the following steps:

   ˪ Click the **Quote Lines** tab to view the notes added to the bundle components of a quote product line.

   ˪ Click the **Recommended Lines** tab to view the notes added to the bundle components of a recommended product line.

     Note: The **Recommended Lines** tab will be displayed or hidden based on the configuration.

7. The list of products in the quote is displayed. To narrow down the list of products displayed, perform the following steps:

   a. Click the **Show Filter Options** hyperlink.

   b. Select one of the following radio buttons:

   ˪ **All Lines**: Select this to display all the products that match the search criteria.

- **Problem Lines**: Select this to display only the products containing the products that match the search criteria and have failed validation.

- **Lines Pending Approval**: Select this to display only the products that match the search criteria and are pending approval.

c. (Optional) Enter the Product ID as the search criteria in the **Find Products Within Quote** box, and click 🔍.

The list of products that match the search criteria is displayed.

The total number of lines displayed on the page is displayed at the bottom of the page. By default, the first 100 lines are displayed. Click **Get More Records** to retrieve the next set of lines, and click **Get All Records** to retrieve all the lines that match the search criteria. You can sort the lines by the Line #, Product ID, and Quantity in either an ascending order or a descending order. For example, to sort the lines by Quantity in an ascending order, move the pointer over the **Quantity** column, click ▼, and select **Sort Ascending**.

Note: When you sort the lines, sorting is performed on the server side. Therefore, when you sort the lines, all the lines that match the search criteria are considered for sorting. If there are any unsaved changes in the lines, and you try to sort the lines, a warning message is displayed.

8. (Optional) To clear the filter options, click the **Hide And Clear Filter** hyperlink. If there are any unsaved changes in a quote product line or a recommended product line, a message asking you for confirmation is displayed. Perform either of the following tasks:

- Click **Yes** to proceed without saving the changes.

- Click **No** to close the message box and return to the Quote Details screen.

9. Click ▦ adjacent to the product to whose component you want to add notes.

Note: The ▦ icon is displayed only if the product is a bundle product.

10. The **Component Pricing** dialog box displays the details of the product and its components, such as the quantity, line total, unit price, and so on. Select the check box adjacent to the corresponding component product, and from the **More** drop-down list, select **View/Add Notes**. Alternatively, click 📝 adjacent to the corresponding component product to which you want to add a note.

Note: The 📝 icon is displayed only if there are any notes added to the component product.

11. The **Notes** dialog box displays the notes that have been added so far. To filter the notes you want to view, perform the following tasks:

- Select the note type from the **Filter by Note Type*** drop-down list to display only the notes of a particular note type. For example, select **All** from the drop-down list to view all the notes.

- Select the **Show System Generated Notes** check box to display the notes that are automatically generated by the system.

12. Click **Close** to close the **Notes** dialog box.

13. Click **Close** to close the **Component Pricing** dialog box and return to the Quote Details screen.

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