Sterling Field Sales

User Guide

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Sterling Commerce
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Contents

Overview of Sterling Field Sales

Sterling Field Sales enables you to manage opportunities and quotes effectively to help you close business deals more efficiently.

An opportunity acts as a container for holding a quote or related alternative quotes that are to be presented to a customer. A quote, on the other hand, is a commercial document that allows a customer to see a predetermined set of products, their quantity, predetermined price, and delivery date. Note that a quote is always associated with an opportunity.

In Sterling Field Sales, 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.

An opportunity moves through the following statuses in its life cycle:

- Inquiry - An opportunity is in the **Inquiry** status after it is created. To create an opportunity, it is mandatory that you provide the details of the customer for whom you are creating the opportunity.

- Negotiation - An opportunity is in the **Negotiation** status when either:

    - The opportunity is automatically created after a quote was created.

    - A user creates a quote and associates the quote to an existing opportunity.

- Won - An opportunity is in the **Won** status after an order has been created from one of the associated quotes.

- Lost - You can mark an opportunity as **Lost** if the opportunity no longer serves the necessary purpose.

A quote moves through the following statuses in its life cycle:

- Created - To create a quote, it is mandatory that you provide the details of the customer for whom you are creating the quote. After providing the customer information, 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:
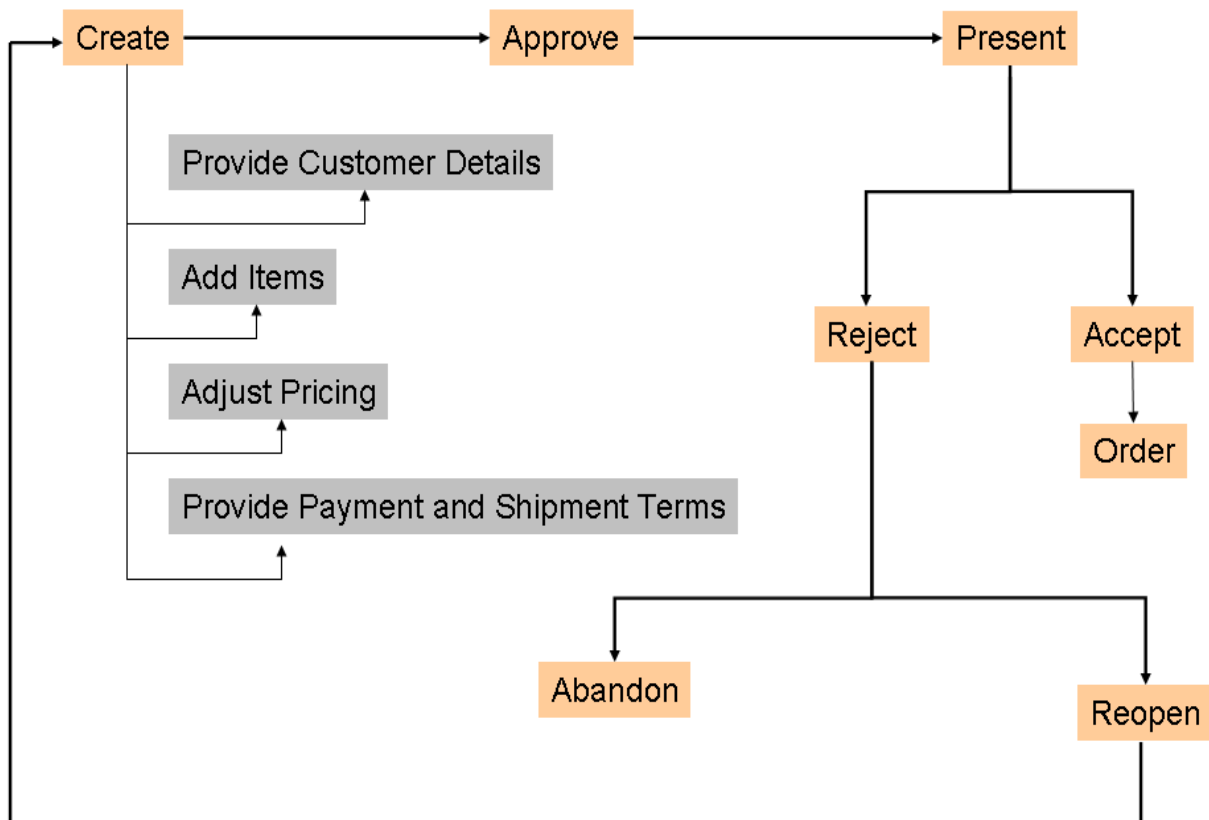
In addition to opportunity and quote management, Sterling Field Sales enables you to search for a product, opportunity, or quote. You can search for a product, view the details of the product, and verify the product's availability. You can also search for an opportunity or a quote, and view its details.

The application also provides the following home pages that assist you in performing the tasks that you perform frequently, and enable you to view the information that you want to see most often:

- Application home page - This enables you to perform certain tasks that you perform frequently, such as searching for an opportunity or a quote, or browsing the product catalog. The application home page also comprises a **Dashboard** panel that enables you to view information that is most important to you. You can configure the **Dashboard** to display information the that you want to see often.

- Opportunity home page - This enables you to perform certain opportunity-related tasks that you perform frequently, such as creating an opportunity or searching for an opportunity. The Opportunity home page also comprises a **Dashboard** panel that enables you to view important information about your opportunities. You can configure the **Dashboard** to display the information that you want to see often.

- Quote home page - This enables you to perform certain quote-related tasks that you perform frequently, such as creating a quote or searching for a quote. The Quote home page also comprises a **Dashboard** panel that enables you to view important information about your quotes. You can configure the **Dashboard** to display the information that you want to see often.

Logging In to the Sterling Field Sales Application

To access the Sterling Field Sales application and use its features, you must first log in to the application using a valid user ID and password.

Note: You can log in to the application with an enterprise in context.

To log in to the application:

1. Point your browser to the appropriate URL provided by your system administrator.
2. A new browser window is displayed. Enter your user ID and password, and click **Sign In**.

   The Sterling Field Sales application home page is displayed.

Understanding the Sterling Field Sales Application User Interface

To get the most out of Sterling Field Sales, it is important to understand the structure of the application.

The following figure illustrates the user interface layout:
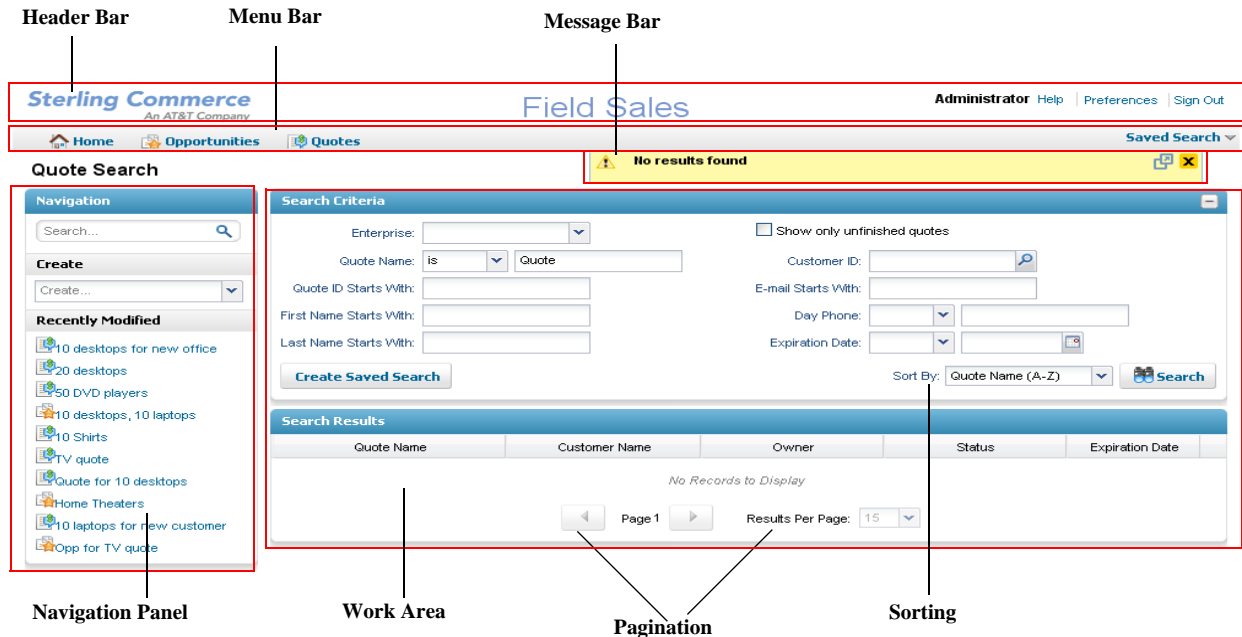
The user interface comprises the following elements:

- Header Bar - The header bar displays the following information and hyperlinks:
  - Application Name - The name of the application, in this case, Sterling Field Sales.
  - User Name - The name of the user who has logged in to the application.
  - Preferences - Click this hyperlink to set your user preferences.
  - Help - Move the pointer over the **Help** menu to perform the following tasks:
    - Access the context-sensitive help describing the current screen.
    - Access the documentation online library.
    - View the names of the applications that have been installed and the copyright information.
  - Sign out - Click this hyperlink to log out of the application.
- Menu Bar - This comprises the following elements:
  - Home - Click this tab to navigate to the application home page.
  - Opportunities - Click this tab to navigate to the Opportunity home page.
  - Quotes - Click this tab to navigate to the Quote home page.

- Saved Search - Select a saved search from the **Saved Search** drop-down menu to view and execute a saved search. Click **Manage Saved Searches** from the **Saved Search** drop-down menu to manage saved searches.

- Message Bar - This displays any status updates, warning messages, or error messages that result from a task that you performed.

- Navigation Panel - This panel comprises the following panels:

  - Search - This enables you to perform a quick search for entities such as an opportunity or a quote.

  - Create - This enables you to create an entity such as an opportunity or quote.

  - Tasks - This displays all the related tasks that you can perform from the current screen. These related tasks are dynamically populated based on the task you are currently performing.

  - Recently Modified - This displays 10 of your most recently modified entities, such as opportunities or quotes, as hyperlinks. The entities are displayed in the order of the modification time, with the most recently modified entity at the top of the list. Click the hyperlink to view the details of the entity.

  Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

- Work Area - This is the area within the application window where you can view and modify details pertaining to the current task.

- Pagination - The search results are displayed in multiple pages. In order to view the search results across the multiple pages, click ◀ to navigate to the previous page and click ▶ to navigate to the next page.

  You can also determine the number of search results that are displayed on each page. From the **Results per page** drop-down list, select an option. For example, if you select 15, when you are viewing the search results, 15 records will be displayed in 15 rows.

- Sorting - You can sort the search results, as required. From the **Sort By** drop-down list, select the required option. For example, when searching for quotes, you can sort the search results by the Quote Name in either an ascending or a descending order.

- Icons - In the Sterling Field Sales application, you can perform certain tasks by clicking the corresponding icons in the user interface. For example, you can click 🗓 adjacent to the **Date** field to select a date. However, a few icons only indicate a condition, and cannot be used to perform tasks. For example, the ✱ icon indicates a mandatory field.

Notes:

- The Web browser toolbar is hidden. It is recommended that you do not perform actions such as navigating back to the previous page, refreshing the current page, and so on, using the browser hot keys.

- If you enlarge the width of the Web browser window to a size that is greater than 1024 pixels, a white background appears on both sides of the application.

- If you reduce the width of the Web browser window to a size that is less than 1024 pixels, a horizontal scrollbar is displayed.

Using the Sterling Field Sales Application Home Page

The home page is the first screen that is displayed after you log in to the Sterling Field Sales application. When using the application, if you want to navigate to the home page at any point of time, click **Home** in the menu bar.

The home page comprises the following panels that assist you in performing certain tasks or viewing information:

- Home
- Dashboard

Using the Home Panel

The **Home** panel provides hyperlinks that enable you to perform certain tasks. The hyperlinks are available under their related entities. For example, the **New Opportunity** and **Find Opportunity** hyperlinks, which are available under **Opportunity**, enable you to create a new opportunity and search for an opportunity respectively.

The following table describes the tasks that you can perform from the application home page:

Click...	To...	Refer to topic...
New Opportunity	Create an opportunity.	Create an Opportunity
Find Opportunity	Search for an opportunity created for your enterprise.	Search for an Opportunity
New Quote	Create a quote.	Create a Quote
Find Quote	Search for a quote created for your enterprise.	Search for a Quote
Find Product	Browse your enterprise's product catalog, and view the details of a product.	◆ Search for a Product ◆ View Product Details and Check Availability

Using the Dashboard

The home page provides a **Dashboard** panel that enables you to customize the view so that you can see the information that is most important to you.

You can configure the Dashboard to display the details that you want to see most often by selecting the dashlets that you want displayed in the **Dashboard** panel. The following dashlets are provided out of the box:

- Recently Modified: This displays a maximum of 10 of your most recently modified entities, such as opportunities or quotes. The entities are displayed in the order of the modification time, with the most recently modified entity at the top of the list.
- New Product Releases: This displays a maximum of 25 products that have been added to the catalog in the current month.

- Expiring Products: This displays a maximum of 25 products whose effective end date falls within the current month.
- My Qualified Opportunities: This displays a maximum of 25 of your opportunities which you have not yet started working on.
- My Opportunities: This displays a maximum of 25 of your opportunities that you are currently working on.
- Recently Modified Opportunities: This displays 10 of your most recently modified opportunities. The opportunities are displayed in the order of the modification time, with the most recently modified opportunity at the top of the list.
- Probability of Success: This displays a bar graph with different lengths representing the open opportunities that have been grouped based on their probability of success (in %). Each bar in the graph represents the probability of success (in %) for a particular range, and the length of the bar represents the number of opportunities with the probability of success (in %) falling within that range.

  When you move the pointer over a bar in the graph, you can view the number of opportunities represented by that bar and the total estimated amount that will be earned from the opportunities for an enterprise. This amount is displayed in the currency that is defined for the enterprise. If you have access to multiple enterprises, you can view the breakdown of the total estimated amount that will be earned from the opportunities for each of the enterprises.

- My Quotes Pending Approval: This displays a maximum of 25 quotes for which you have requested approval.
- Quotes Pending My Approval: This displays a maximum of 25 quotes that are pending your approval.
- Recently Modified Quotes: This 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.

Customize the Dashboard

You can configure your dashboard to display only those dashlets that you want to see most often. You can select the dashlets that you want displayed in the **Dashboard** panel. Based on your implementation, you can select the layout that you want to use for the **Dashboard** panel. The changes that you make to the dashboard are saved, and the dashlets that you select are displayed every time you log in. For example, if you no longer want the **Recently Modified** dashlet to be displayed on your dashboard, you can click ⊠. The changes will be saved automatically, and the dashlet will not be displayed on the home page.

You can perform the following tasks to configure your dashboard:

- Change the Dashboard Layout
- Change the Order of Dashlets
- Add a Dashlet
- Remove a Dashlet

After making changes to the dashboard, if you want to revert back to the default settings, click the **Reset Dashboard** hyperlink. A message asking you for confirmation is displayed. Click **Yes**.

Change the Dashboard Layout

Based on the implementation of the Sterling Field Sales application, you can change the layout of the **Dashboard** panel. The changes that you make to the layout are saved, and this is the layout that is displayed every time you log in.

To change the dashboard layout:

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

2. From the layouts displayed, select the layout you want to use by selecting the corresponding radio button.

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

4. Click **Show Dashboard**. The dashboard is displayed in the layout that you selected.

Change the Order of Dashlets

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

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

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

Add a Dashlet

You can add a dashlet to the **Dashboard** panel. For example, if you want the **Quotes Pending My Approval** dashlet to be displayed in the **Dashboard** panel, you can configure the dashboard accordingly.

To add a dashlet:

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

2. In the **Dashlets** panel, select the entity pertaining to the dashlet by selecting the corresponding check box.

3. The dashlets that are available for the selected entity are displayed. Select the dashlet you want to add by clicking the corresponding **Add <*dashlet*>** button.

    Notes:

    ⠇ You can add multiple dashlets at one time.

    ⠇ After you click the **Add <*dashlet*>** button, the changes are saved automatically.

4. Click **Show Dashboard**. The **Dashboard** displays the dashlet that you added.

Remove a Dashlet

You can remove a dashlet if you no longer want it to be displayed in the **Dashboard** panel. For example, if your dashboard displays the **Expiring Products** dashlet, and you no longer feel the need for this dashlet, you can remove it. To remove a dashlet from the **Dashboard** panel, click ✖ corresponding to the dashlet you want to remove. The dashlet is automatically removed.

Using the Opportunity Home Page

The Opportunity home page enables you to view certain information related to your opportunities and perform tasks, such as creating an opportunity, searching for an opportunity, searching for a product, and so on. When using the application, if you want to navigate to the Opportunity home page at any point of time, click **Opportunities** in the application header bar.

The Opportunity home page comprises the following panels that assist you in performing certain tasks or viewing information:

- Home
- Dashboard

Using the Home Panel

The **Home** panel provides hyperlinks that enable you to perform certain tasks. The hyperlinks are available under their related entities. For example, the **New Opportunity** and **Find Opportunity** hyperlinks, which are available under **Opportunity**, enable you to create a new opportunity and search for an opportunity respectively.

The following table describes the tasks that you can perform from the application home page:

Click...	To...	Refer to topic...
New Opportunity	Create an opportunity.	Create an Opportunity
Find Opportunity	Search for an opportunity created for your enterprise.	Search for an Opportunity
New Quote	Create a quote.	Create a Quote
Find Quote	Search for a quote created for your enterprise.	Search for a Quote
Find Product	Browse your enterprise's product catalog, and view the details of a product.	◆ Search for a Product ◆ View Product Details and Check Availability

Using the Dashboard

The Opportunity home page provides a **Dashboard** panel that enables you to view important information about your opportunities.

You can configure the Dashboard to display the details that you want to see most often, by selecting the dashlets that you want displayed in the **Dashboard** panel. The following dashlets are provided out of the box:

- Recently Modified: This displays a maximum of 10 of your most recently modified entities, such as opportunities or quotes. The entities are displayed in the order of the modification time, with the most recently modified entity at the top of the list.

- New Product Releases: This displays a maximum of 25 products that have been added to the product catalog in the current month.

- Expiring Products: This displays a maximum of 25 products whose effective end date falls within the current month.

- My Qualified Opportunities: This displays a maximum of 25 of your opportunities which you have not yet started working on.

- My Opportunities: This displays a maximum of 25 of your opportunities which you are currently working on.

- Recently Modified Opportunities: This displays a maximum of 10 of your most recently modified opportunities. The opportunities are displayed in the order of the modification time, with the most recently modified opportunity at the top of the list.

- Probability of Success: This displays a bar graph with different lengths representing the open opportunities that have been grouped based on their probability of success (in %). Each bar in the graph represents the probability of success (in %) for a particular range, and the length of the bar represents the number of opportunities with the probability of success (in %) falling within that range.

  When you move the pointer over a bar in the graph, you can view the number of opportunities represented by that bar and the total estimated amount that will be earned from the opportunities for an enterprise. This amount is displayed in the currency that is defined for the enterprise. If you have access to multiple enterprises, you can view the breakdown of the total estimated amount that will be earned from the opportunities for each of the enterprises.

- Quotes Pending My Approval: This displays a maximum of 25 quotes that are pending your approval.

Customize the Dashboard

You can configure your dashboard to display only those dashlets that you want to see most often. You can select the dashlets that you want displayed in the **Dashboard** panel. Based on your implementation, you can select the layout that you want to use for the **Dashboard** panel. The changes that you make to the dashboard are saved, and the dashlets that you select are displayed every time you log in. For example, if you no longer want the **Recently Modified** dashlet to be displayed on your dashboard, you can click ![X]. The changes will be saved automatically, and the dashlet will not be displayed on the Opportunity home page.

You can perform the following tasks to configure your dashboard:

- Change the Dashboard Layout
- Change the Order of Dashlets
- Add a Dashlet
- Remove a Dashlet

After making changes to the dashboard, if you want to revert back to the default settings, click the **Reset Dashboard** hyperlink. A message asking you for confirmation is displayed. Click **Yes**.

Change the Dashboard Layout

Based on the implementation of the Sterling Field Sales application, you can change the layout of the **Dashboard** panel. The changes that you make to the layout are saved, and this is the layout that is displayed every time you log in.

To change the dashboard layout:

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

2. From the layouts displayed, select the layout you want to use by selecting the corresponding radio button.

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

4. Click **Show Dashboard**. The dashboard is displayed in the layout that you selected.

Change the Order of Dashlets

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

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

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

Add a Dashlet

You can add a dashlet to the **Dashboard** panel. For example, if you want the **New Product Releases** dashlet to be displayed on the **Dashboard** panel, you can configure the dashboard accordingly.

To add a dashlet:

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

2. In the **Dashlets** panel, select the entity pertaining to the dashlet by selecting the corresponding check box.

3. The dashlets that are available for the selected entity are displayed. Select the dashlet you want to add by clicking the corresponding **Add** *<dashlet>* button.

    Notes:

    *   You can add multiple dashlets at one time.

    *   After you click the **Add** *<dashlet>* button, the changes are saved automatically.

4. Click **Show Dashboard**. The **Dashboard** displays the dashlet that you added.

Remove a Dashlet

You can remove a dashlet if you no longer want it to be displayed in the **Dashboard** panel. For example, if your dashboard displays the **My Qualified Opportunities** dashlet, and you no longer feel the need for this dashlet, you can remove it. To remove a dashlet from the **Dashboard** panel, click ⊠ corresponding to the dashlet you want to remove. The dashlet is automatically removed.

Using the Quote Home Page

The Quote home page enables you to view certain information related to your quotes and perform tasks, such as creating a quote, searching for a quote, searching for a product, and so on. When using the application, if you want to navigate to the Quote home page at any point of time, click **Quotes** in the application header bar.

The Quote home page comprises the following panels that assist you in performing certain tasks or viewing information:

- Home
- Dashboard

Using the Home Panel

The **Home** panel provides hyperlinks that enable you to perform certain tasks. The hyperlinks are available under their related entities. For example, the **New Opportunity** and **Find Opportunity** hyperlinks, which are available under **Opportunity**, enable you to create a new opportunity and search for an opportunity respectively.

The following table describes the tasks that you can perform from the application home page:

Click...	To...	Refer to topic...
New Opportunity	Create an opportunity.	Create an Opportunity
Find Opportunity	Search for an opportunity created for your enterprise.	Search for an Opportunity
New Quote	Create a quote.	Create a Quote
Find Quote	Search for a quote created for your enterprise.	Search for a Quote
Find Product	Browse your enterprise's product catalog, and view the details of a product.	◆ Search for a Product ◆ View Product Details and Check Availability

Using the Dashboard

The Quote home page provides a **Dashboard** panel that enables you to view important information about your quotes.

You can configure the Dashboard to display the details that you want to see most often, by selecting the dashlets that you want displayed in the **Dashboard** panel. The following dashlets are provided out of the box:

- Recently Modified: This displays a maximum of 10 of your most recently modified entities, such as opportunities or quotes. The entities are displayed in the order of the modification time, with the most recently modified entity at the top of the list.

- New Product Releases: This displays a maximum of 25 products that have been added to the product catalog in the current month.
- Expiring Products: This displays a maximum of 25 products whose effective end date falls within the current month.
- My Quotes Pending Approval: This displays a maximum of 25 quotes for which you have requested approval.
- Quotes Pending My Approval: This displays a maximum of 25 quotes that are pending your approval.
- Recently Modified Quotes: This 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.

Customize the Dashboard

You can configure your dashboard to display only those dashlets that you want to see most often. You can select the dashlets that you want displayed in the **Dashboard** panel. Based on your implementation, you can select the layout that you want to use for the **Dashboard** panel. The changes that you make to the dashboard are saved, and the dashlets that you select are displayed every time you log in. For example, if you no longer want the **Recently Modified** dashlet to be displayed on your dashboard, you can click ☒ . The changes will be saved automatically, and the dashlet will not be displayed on the Quote home page.

You can perform the following tasks to configure your dashboard:

- Change the Dashboard Layout
- Change the Order of Dashlets
- Add a Dashlet
- Remove a Dashlet

After making changes to the dashboard, if you want to revert back to the default settings, click the **Reset Dashboard** hyperlink. A message asking you for confirmation is displayed. Click **Yes**.

Change the Dashboard Layout

Based on the implementation of the Sterling Field Sales application, you can change the layout of the **Dashboard** panel. The changes that you make to the layout are saved, and this is the layout that is displayed every time you log in.

To change the dashboard layout:

1. In the **Dashboard** panel, click the **Customize** hyperlink.
2. From the layouts displayed, select the layout you want to use by selecting the corresponding radio button.
3. Click **Save Layout** to save the changes.
4. Click **Show Dashboard**. The dashboard is displayed in the layout that you selected.

Change the Order of Dashlets

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

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

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

Add a Dashlet

You can add a dashlet to the **Dashboard** panel. For example, if you want the **Recently Modified** dashlet to be displayed in the **Dashboard** panel, you can configure the dashboard accordingly.

To add a dashlet:

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

2. In the **Dashlets** panel, select the entity pertaining to the dashlet by selecting the corresponding check box.

3. The dashlets that are available for the selected entity are displayed. Select the dashlet you want to add by clicking the corresponding **Add <*dashlet*>** button.

   Notes:

   ⌐ You can add multiple dashlets at one time.

   ⌐ After you click the **Add <*dashlet*>** button, the changes are saved automatically.

4. Click **Show Dashboard**. The **Dashboard** displays the dashlet that you added.

Remove a Dashlet

You can remove a dashlet if you no longer want it to be displayed in the **Dashboard** panel. For example, if your dashboard displays the **Expiring Products** dashlet, and you no longer feel the need for this dashlet, you can remove it. To remove a dashlet from the **Dashboard** panel, click ✕ corresponding to the dashlet you want to remove. The dashlet is automatically removed.

Set User Preferences

You can set your user preferences. You can decide whether you want the **Navigation** panel to be displayed or hidden in the application.

After you set your preferences, the changes you make will persist every time you log in to the application.

To set the user preferences:

1. Log in to Sterling Field Sales.

2. In the application header bar, click **Preferences**.

3. The Preferences dialog box is displayed. Select the **Hide Navigation Panel** check box to not display the **Navigation** panel.

   Note: By default, the **Hide Navigation Panel** check box is not selected.

4. Click **Save**. The Preferences dialog box is closed and the application Home page is refreshed to hide the **Navigation** panel.

   Notes:

   ᴸ If you set the user preferences from a screen other than the application Home page, after you click **Save**, you will be redirected to the application Home page.

   ᴸ If you navigate to another screen, the **Actions** button is displayed if there are any related tasks that can be performed from that screen. Click the **Actions** button to view the related task hyperlinks.

View and Execute a Saved Search

You can search for a saved search, and then view and execute the saved search.

To view and execute a saved search:

1. Log in to Sterling Field Sales.

2. From the **Saved Search** drop-down menu in the menu bar, click the saved search you want to view and execute. The **Saved Search** drop-down menu displays a maximum of 10 saved searches, sorted in alphabetical order. If the saved search you want to view and execute is not displayed in the **Saved Search** drop-down menu, click **Manage Saved Searches**. The Manage Saved Searches dialog box is displayed. Perform the following steps:

   a. In the **Saved Search Name Contains** box, enter either the complete name or the partial name of the saved search.

   b. From the **Search Type** drop-down list, select the appropriate entity. For example, to search for a saved opportunity search, select Opportunity from the drop-down list.

   c. Click **Search**. The saved searches matching the criteria are displayed in the **Search Results** panel.

   d. Select the check box adjacent to the saved search you want to view and execute, and click .

   The corresponding search screen is displayed with the search criteria populated along with the search results.

Rename a Saved Search

After saving a search, you can rename the saved search.

To rename a saved search:

1. Log in to Sterling Field Sales.

2. From the **Saved Search** drop-down menu in the menu bar, click **Manage Saved Searches**.

3. The Manage Saved Searches dialog box is displayed. In the **Search Criteria** panel, search for the saved search by performing the following steps:

   a. In the **Saved Search Name Contains** box, enter either the complete name or the partial name of the saved search.

   b. From the **Search Type** drop-down list, select the appropriate entity. For example, to search for a saved opportunity search, select Opportunity from the drop-down list.

   c. Click **Search**.

4. The saved searches matching the criteria are displayed in the **Search Results** panel. Perform the following steps:

   a. Select the check box adjacent to the saved search you want to rename.

   b. Click the existing saved search name and enter a new name in the **Saved Search Name** column.

   c. Click **Save**.

5. Click **Close** to close the **Manage Saved Searches** dialog box.

Delete a Saved Search

You can delete a saved search if the saved search is no longer required.

To delete a saved search:

1. Log in to Sterling Field Sales.
2. From the **Saved Search** drop-down menu in the menu bar, click **Manage Saved Searches**.
3. The Manage Saved Searches dialog box is displayed. In the **Search Criteria** panel, search for the saved search by performing the following steps:
    a. In the **Saved Search Name Contains** box, enter either the complete name or the partial name of the saved search.
    b. From the **Search Type** drop-down list, select the appropriate entity. For example, to search for a saved opportunity search, select Opportunity from the drop-down list.
    c. Click **Search**.
4. The saved searches matching the criteria are displayed in the **Search Results** panel. Select the check box adjacent to the saved search you want to delete, and click **Delete**.
5. A message asking you for confirmation is displayed. Click **Yes**.
6. Click **Close** to close the Manage Saved Searches dialog box.

Search for a Product

You can search for a product that is available in the catalog. You can search for a product from any of the home pages and the Quote Details screen.

Search for a Product from the Home Page

You can search for a product from the application home page, Quote home page, or Opportunity home page. You can also narrow down the search results by performing a search for a product within the search results. Note that the search results may vary depending on the keywords that are defined by your administrator. For example, if you are looking for a particular laptop, you can search for it using computer as the keyword, provided your administrator has configured computer as a keyword that can be used to search for the laptop.

To search for a product from the home page:

1. Log in to Sterling Field Sales.

2. In the application home page, click the **Find Product** hyperlink. Alternatively, click the **Find Product** hyperlink in the Opportunity home page or the Quote home page.

3. The Select Enterprise dialog box is displayed. From the **Enterprise*** drop-down list, select the enterprise that owns the catalog containing the product you want to search for, and click **Select**.

   Note: The Select Enterprise dialog box is displayed only if you have access to multiple enterprises.

4. The Product Search screen displays the list of available products. If a product is configurable, the 🔧 **Product is configurable** is displayed adjacent to the product. You can perform the following steps:

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

   ⬩ The **Browse Categories** panel displays the categories and the subcategories that the products belong to, and the number of products available in each category. Click the ***<category>*** hyperlink in the **Browse Categories** panel to view the products under that category.

     Note: The **Browse Categories** panel displays only the categories as hyperlinks. To view the sub-categories, click 🔺.

   ⬩ The **Narrow By** panel displays the attributes assigned to the categories. It also displays the attribute values that are assigned to the products in those categories, and the number of products that have been assigned the attribute value. Click an ***<attribute value>*** hyperlink in the **Narrow By** panel to view the products that have been assigned that attribute value.

     The total number of records retrieved by the search is displayed at the top of the page. If the search results span across multiple pages, the page numbers of the pages that contain the search results are displayed, with the current page highlighted. By default, a maximum of five pages are displayed. Click the ***<page number>*** hyperlink to navigate to a page. If the search results are spread over more than five pages, a **Previous** hyperlink and a **Next** hyperlink are displayed. Click

the **Previous** hyperlink to navigate to the previous page, and the **Next** hyperlink to navigate to the next page.

> **Note:** The **Previous** hyperlink is disabled if you are viewing the first page, and the **Next** hyperlink is disabled if you are viewing the last page.

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.

Search for a Product from the Quote Details Screen

You can search for a product from the **Products** tab of the Quote Details screen.

To search for a product from the Quote Details screen:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   ▪ Click the **Find Quote** hyperlink.

   ▪ Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   ▪ Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   ▪ Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   ▪ Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     > **Note:** The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

     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:

   ▪ Under the **Tasks** panel, click **Modify Quote**.

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

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

7. 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. 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 🔍 .

- The **Browse Categories** panel displays the categories and the subcategories that the products belong to, and the number of products available in each category. Click the *<category>* hyperlink in the **Browse Categories** panel to view the products under that category.

  Note: The **Browse Categories** panel displays only the categories as hyperlinks. To view the sub-categories, click ▲ .

- The **Narrow By** panel displays the attributes assigned to the categories. It also displays the attribute values that are assigned to the products in those categories, and the number of products that have been assigned the attribute value. Click an *<attribute value>* hyperlink in the **Narrow By** panel to view the products that have been assigned that attribute value.

  The total number of records retrieved by the search is displayed at the top of the page. If the search results span across multiple pages, the page numbers of the pages that contain the search results are displayed, with the current page highlighted. By default, a maximum of five pages are displayed. Click the *<page number>* hyperlink to navigate to a page. If the search results are spread over more than five pages, a **Previous** hyperlink and a **Next** hyperlink are displayed. Click the **Previous** hyperlink to navigate to the previous page, and the **Next** hyperlink to navigate to the next page.

  Note: The **Previous** hyperlink is disabled if you are viewing the first page, and the **Next** hyperlink is disabled if you are viewing the last page.

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.

View Product Details and Check Availability

Using Sterling Field Sales, 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 any of the home pages or from the Quote Details screen.

Using the Home Page

You can view the details of a product and check its availability from the application home page, Quote home page, or Opportunity home page.

To view the details of a product and check its availability from the home page:

1. Log in to Sterling Field Sales.

2. In the application home page, click the **Find Product** hyperlink. Alternatively, click the **Find Product** hyperlink in the Opportunity home page or the Quote home page.

3. The Select Enterprise dialog box is displayed. From the **Enterprise*** drop-down list, select the enterprise that owns the catalog containing the product you want to search for, and click **Select**.

   Note: The Select Enterprise dialog box is displayed only if you have access to multiple enterprises.

4. The Product Search screen is displayed. The list of available products is displayed in the **Search Results** panel. If a product is configurable, the 🔧 **Product is configurable** is displayed adjacent to the product. 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 🔍.

   - The **Browse Categories** panel displays the categories and the subcategories that the products belong to, and the number of products available in each category. Click the **<category>** hyperlink in the **Browse Categories** panel to view the products under that category.

     Note: The **Browse Categories** panel displays only the categories as hyperlinks. To view the sub-categories, click ▲.

   - The **Narrow By** panel displays the attributes assigned to the categories. It also displays the attribute values that are assigned to the products in those categories, and the number of products that have been assigned the attribute value. Click an **<attribute value>** hyperlink in the **Narrow By** panel to view the products that have been assigned that attribute value.

     The total number of records retrieved by the search is displayed at the top of the page. If the search results span across multiple pages, the page numbers of the pages that contain the search results are displayed, with the current page highlighted. By default, a maximum of five pages are displayed. Click the **<page number>** hyperlink to navigate to a page. If the search results are spread over more than five pages, a **Previous** hyperlink and a **Next** hyperlink are displayed. Click the **Previous** hyperlink to navigate to the previous page, and the **Next** hyperlink to navigate to the next page.

     Note: The **Previous** hyperlink is disabled if you are viewing the first page, and the **Next** hyperlink is disabled if you are viewing the last page.

- Click the **Check Availability** hyperlink to check the availability of the product. The Product Availability dialog box is displayed. You can view the Product, Requested Quantity, and Availability Status of the product. 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.

    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.

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

6. (Optional) To narrow down the search, perform one of the following tasks:

    - To search for a product within the search results, click **Search in Results**, enter the appropriate keyword, and then click 🔍. In the **Search Results** panel, click the corresponding **<short description of product (Product ID)>** hyperlink to view the details of the product.

    - To search for a product within a category, click the **<category>** hyperlink in the **Browse Categories** panel. In the **Search Results** panel, click the corresponding **<short description of product (Product ID)>** hyperlink to view the details of the product.

    - To search for a product with a specific attribute, click the **<attribute>** hyperlink in the **Narrow By** panel. In the **Search Results** panel, click the corresponding **<short description of product (Product ID)>** hyperlink to view the details of the product.

    As you narrow down the search, your navigation path is displayed as bread crumbs, each of which is a hyperlink. For example, if you narrow down the search by clicking the Desktop category in the **Browse Categories** panel, and then the 12GB Hard Drive attribute in the **Narrow By** panel, the bread crumbs will be displayed as Desktop >> 12GB Hard Drive. If you click a bread crumb, the subsequent bread crumbs are no longer displayed. In this example, if you click the Desktop bread crumb, the 12GB Hard Drive bread crumb will no longer be displayed.

7. When you click the **<short description of product (Product ID)>** hyperlink or the product's image, the Product Details screen is displayed. You can view the product's description, unit of measure, unit price, and so on. If a product is configurable, the 🛠 **Product is configurable** is displayed. Additionally, you can view the following information based on the type of 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 check the availability of the product, click the **Check Availability** hyperlink.

9. The Product Availability dialog box is displayed. You can view the Product, Requested Quantity, and Availability Status of the product. Click **Close** to close the Product Availability dialog box.

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

10. To view more images of the product, click the **More Images** hyperlink. The More Images dialog box is displayed. You can view more images of the product, the long description of the image, and so on. Click **Close** to close the More Images dialog box.

11. 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.

Using the Quote Details Screen

You can view the details of a product and check its availability from the **Products** tab of the Quote Details screen.

To view the details of a product and check its availability using the Quote Details screen:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   - Click the **Find Quote** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   - Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

- Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

  Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

  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:

   - Under the **Tasks** panel, click **Modify Quote**.
   - Click the **Edit** hyperlink in the **Lines** panel.

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

7. 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. 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 🔍 .

   - The **Browse Categories** panel displays the categories and the subcategories that the products belong to, and the number of products available in each category. Click the *<category>* hyperlink in the **Browse Categories** panel to view the products under that category.

     Note: The **Browse Categories** panel displays only the categories as hyperlinks. To view the sub-categories, click 🔺.

   - The **Narrow By** panel displays the attributes assigned to the categories. It also displays the attribute values that are assigned to the products in those categories, and the number of products that have been assigned the attribute value. Click an *<attribute value>* hyperlink in the **Narrow By** panel to view the products that have been assigned that attribute value.

     The total number of records retrieved by the search is displayed at the top of the page. If the search results span across multiple pages, the page numbers of the pages that contain the search results are displayed, with the current page highlighted. By default, a maximum of five pages are displayed. Click the *<page number>* hyperlink to navigate to a page. If the search results are spread over more than five pages, a **Previous** hyperlink and a **Next** hyperlink are displayed. Click

the **Previous** hyperlink to navigate to the previous page, and the **Next** hyperlink to navigate to the next page.

> **Note:** The **Previous** hyperlink is disabled if you are viewing the first page, and the **Next** hyperlink is disabled if you are viewing the last page.

- Click the **Check Availability** hyperlink to check the availability of the product. The Product Availability dialog box is displayed. You can view the Product, Requested Quantity, and Availability Status of the product. 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.

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.

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

9. (Optional) To narrow down the search, perform one of the following tasks:

   - To search for a product within the search results, click **Search in Results**, enter the appropriate keyword, and then click 🔍 . In the **Search Results** panel, click the corresponding ***<short description of product (Product ID)>*** hyperlink to view the details of the product.

   - To search for a product within a category, click the ***<category>*** hyperlink in the **Browse Categories** panel. In the **Search Results** panel, click the corresponding ***<short description of product (Product ID)>*** hyperlink to view the details of the product.

   - To search for a product with a specific attribute, click the ***<attribute>*** hyperlink in the **Narrow By** panel. In the **Search Results** panel, click the corresponding ***<short description of product (Product ID)>*** hyperlink to view the details of the product.

   As you narrow down the search, your navigation path is displayed as bread crumbs, each of which is a hyperlink. For example, if you narrow down the search by clicking the Desktop category in the **Browse Categories** panel, and then the 12GB Hard Drive attribute in the **Narrow By** panel, the bread crumbs will be displayed as Desktop >> 12GB Hard Drive. If you click a bread crumb, the subsequent bread crumbs are no longer displayed. In this example, if you click the Desktop bread crumb, the 12GB Hard Drive bread crumb will no longer be displayed.

10. When you click the ***<short description of product (Product ID)>*** hyperlink or the product's image, the details of the product are displayed. You can view the product's unit of measure, unit price, and so on. If a product is configurable, the 🔧 **Product is configurable** is displayed. Additionally, you can view the following information based on the type of 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.

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

12. The Product Availability dialog box is displayed. You can view the Product, Requested Quantity, and Availability Status of the product. Click **Close** to close the Product Availability dialog box.

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

13. To view more images of the product, click the **More Images** hyperlink. The More Images dialog box is displayed. You can view more images of the product, the long description of the image, and so on. Click **Close** to close the More Images dialog box.

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

15. Click **Close**. The Product Search dialog box is closed and the Quote Details screen is displayed.

Create an Opportunity

An opportunity is a container to hold a quote or related alternative quotes that can be presented to a customer. Related alternative quotes are a set of quotes that exist at the same time and are independent of each other, but are associated with the same opportunity. Irrespective of the number of quotes in an opportunity, only one can be accepted by a customer. For example, you may offer a customer three alternative quotes: Quote-A for two desktop computers, each being offered with 5% off the list price; Quote-B for one desktop computer and one laptop, each being offered with 5% off the list price; and Quote-C for one desktop computer and two laptops, each being offered with 7% off the list price. The customer is offered the choice between Quote-A, Quote-B, and Quote-C, but the customer can accept only one of them.

You can create an opportunity for an existing customer, a new business customer, or a new consumer customer.

To create an opportunity:

1. Log in to Sterling Field Sales.
2. In the application home page, perform one of the following tasks:
   - Click the **New Opportunity** hyperlink.
   - Click the **Opportunities** tab. In the Opportunity home page, click the **New Opportunity** hyperlink.
   - Click the **Quotes** tab. In the Quote home page, click the **New Opportunity** hyperlink.
   - Under the **Create** panel in the **Navigation** panel, select **Opportunity** from the drop-down list.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.
3. The Select Enterprise dialog box is displayed. From the **Enterprise*** drop-down list, select the enterprise for which you want to create the opportunity, and click **Select**.

   Note: The Select Enterprise dialog box is displayed only if you have access to multiple enterprises.

   The Create Opportunity screen is displayed. The following table describes the fields displayed in the Create Opportunity screen:

Field	Description
Opportunity Name*	The name of the opportunity.
Status	The status of the opportunity. This is displayed with a blank value. After you save the opportunity, the status is automatically populated as **Inquiry**.
Lead Origin	A lead origin is the source from which the lead for the opportunity originated. For example, a lead can originate from a phone conversation, trade show, Web site, and so on.
Created Date	The date on which the opportunity is created. This is displayed with a blank value. After you save the opportunity, the date is automatically populated, and the current date is displayed.

Field	Description
Success %	The opportunity's probability of success (in %).
Owner ID	The identifier of the user who is assigned as the opportunity owner. If you leave this field blank, the user who is creating the opportunity is automatically assigned as the owner of the opportunity.
Anticipated Close Date	The date by which the opportunity is expected to be closed.
Opportunity Value	The value of the opportunity. The opportunity value is the total amount that will be earned as revenue if a quote for the opportunity is accepted by the customer. The currency for the opportunity value is the currency defined for the enterprise for which you are creating the opportunity.
Co-Owner ID	The identifier of the user who is assigned as the co-owner of the opportunity. A co-owner is the secondary owner of an opportunity.
Existing Customer*	An existing customer is a customer whose records already exist in the system. Use this radio button to create an opportunity for an existing customer.
New Customer	Use this radio button to create an opportunity for a new customer.

Note: * indicates that the field is mandatory.

You can perform the following tasks:

- Create an Opportunity for an Existing Business Customer
- Create an Opportunity for an Existing Consumer Customer
- Create an Opportunity for a New Business Customer
- Create an Opportunity for a New Consumer Customer

Create an Opportunity for an Existing Business Customer

An opportunity is a container for holding a quote or related alternative quotes that are presented to a customer. You can create an opportunity for an existing business customer. An existing business customer is a business customer whose records already exist in the system. For example, let us suppose that the enterprise for which you are creating the opportunity has a customer, XYZ Corporation, which has been placing an order regularly for electronic products, and for which opportunities have been created in the past. You get a lead that XYZ Corporation is expanding its operations for which it has to place an order for electronic products. In such a scenario, you can create an opportunity for holding a quote or alternative quotes that can be presented to XYZ Corporation.

To create an opportunity for an existing business customer:

1. Log in to Sterling Field Sales.

2. In the application home page, perform one of the following tasks:

   - Click the **New Opportunity** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **New Opportunity** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **New Opportunity** hyperlink.

   - Under the **Create** panel in the **Navigation** panel, select **Opportunity** from the drop-down list.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

3. The Select Enterprise dialog box is displayed. From the **Enterprise*** drop-down list, select the enterprise for which you want to create the opportunity, and click **Select**.

   Note: The Select Enterprise dialog box is displayed only if you have access to multiple enterprises.

4. The Create Opportunity screen is displayed. In the **Create Opportunity** panel, enter the appropriate information:

   - In the **Opportunity Name*** box, enter a name for the opportunity.

   - From the **Lead Origin** drop-down list, select the lead origin for the opportunity. A lead origin is the source from which the lead for the opportunity originated. For example, a lead can originate from a phone conversation, trade show, Web site, and so on.

   - In the **Success %** box, enter the probability of success (in %). The probability of success (in %) is used to indicate the opportunity's chances of being successful. For example, if the opportunity has an equal chance of being a success or a failure, you can enter 50 in the box.

   - Click adjacent to the **Owner ID** box to search for the user who has been assigned as the owner of the opportunity. The User Search dialog box is displayed. Enter the appropriate search criteria and click **Search**. The User ID and User Name of the users matching the search criteria are displayed in the **Search Results** panel. Select the check box adjacent to the user, and click **Select**. Alternatively, double-click the **User ID** column or click the corresponding User ID hyperlink to select the user. The User ID of the user is populated in the **Owner ID** box.

- Click adjacent to the **Anticipated Close Date** field to select the anticipated close date. This is the date by which the opportunity is expected to be closed.

- In the **Opportunity Value** box, enter the value of the opportunity. The opportunity value is the total amount that will be earned as revenue if a quote for the opportunity is accepted by the customer. The currency for the opportunity value is the currency defined for the enterprise for which you are creating the opportunity.

- Click adjacent to the **Co-Owner ID** box to search for the user who has been assigned as the co-owner of the opportunity. A co-owner is the secondary owner of an opportunity. The User Search dialog box is displayed. Enter the appropriate search criteria and click **Search**. The User ID and User Name of the users matching the search criteria are displayed in the **Search Results** panel. Select the check box adjacent to the user, and click **Select**. Alternatively, double-click the **User ID** column or click the corresponding User ID hyperlink to select the user. The User ID of the user is populated in the **Co-Owner ID** box.

5. In the **Customer** panel, perform the following steps:

   a. Select the **Existing Customer*** radio button.

   b. Click adjacent to the **Existing Customer** radio button to search for the customer.

   c. The Customer Search dialog box is displayed. Depending on the **Customer Type** you want to search for, select either the **Business** radio button or the **Consumer** radio button.

   d. Enter the other search criteria and click **Search**.

   e. The list of customers matching the search criteria is displayed in the **Search Results** panel. Select the check box adjacent to the relevant 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 box adjacent to the **Existing Customer** radio button.

6. Click **Save**.

   Note: * indicates that the field is mandatory.

   The Opportunity Details screen containing the details of the newly created opportunity is displayed.

Assign a Different Contact

When creating an opportunity for an existing business customer, you can assign a different contact to this business customer.

To assign a different business customer contact:

1. In the Create Opportunity screen, under the **Customer** panel, select a different contact from the **Contact*** drop-down list. Alternatively, click the **New** hyperlink in the **Contact** panel. The Add New Contact dialog box is displayed. Enter the following information, as appropriate, and click **Save**:

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

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

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

- From the **Title** drop-down list, select the title for the contact, for example, Mrs, Dr, and so on.

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

  Note: The format for the phone number is based on your locale.

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

- In the **Company** box, enter the name of the company.

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

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

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

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

- In the **State** field, enter or select the name of the state in which the contact 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 that you select and the postal code that you enter.

- Select either of the following radio buttons:

  - Commercial: Select this if the address is the commercial address of the contact.

  - **Residential**: Select this if the address is the residential address of the contact.

  Note: * indicates that the field is mandatory.

2. Click **Save**.

   The information pertaining to the contact is displayed under the **Contact** panel.

Modify Contact Details

When creating an opportunity for an existing business customer, you can modify the details of the business customer's contact, such as the phone number, e-mail address, and so on.

To modify the details of a business customer's contact:

1. In the Create Opportunity screen, under the **Customer** panel, click the **Edit** hyperlink in the **Contact** panel.

2. The Edit Contact dialog box is displayed. Modify the following fields, as appropriate:

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

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

   - To choose 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 contact.

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

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

   - From the **Title** drop-down list, select the title for the contact, for example, Mrs, Dr, and so on.

- In the **Company** box, enter the name of the company.
- In the **Address** boxes, enter the address of the contact.
- From the **Country*** drop-down list, select the country in which the contact resides.
- In the **Postal Code** box, enter the postal code of the city in which the contact resides.
- In the **City** box, enter the name of the city in which the contact resides.
- In the **State** field, enter or select the name of the state in which the contact 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 that you select and the postal code that you enter.
- Select either of the following radio buttons:

  - Commercial: Select this if the address is the commercial address of the contact.

  - **Residential**: Select this if the address is the residential address of the contact.

3. Click **Save**.
4. If the address that you entered is not valid, the Select Address dialog box displays the valid addresses that are closest to the one that you entered. Select the appropriate option and click **Save** to return to the Create Opportunity screen.
5. Click **Save** in the Create Opportunity screen.

Note: * indicates that the field is mandatory.

Add a Note to an Opportunity

During the process of creating an opportunity for a customer, you can add notes, which can be used for future reference. For example, you can add notes explaining why an opportunity has been created.

To add a note to an opportunity, in the **Notes** panel of the Create Opportunity screen, enter the note text and click **Save**.

Create an Opportunity for an Existing Consumer Customer

An opportunity is a container for holding a quote or related alternative quotes that are presented to a customer. You can create an opportunity for an existing consumer customer. An existing consumer customer is a consumer customer whose records already exist in the system. For example, let us suppose that the enterprise for which you are creating the opportunity has a customer ABC, who has been placing an order regularly for products, and for which opportunities have been created in the past. You get a lead that ABC wants to place an order for some more products. In such a scenario, you can create an opportunity for holding a quote or alternative quotes that can be presented to ABC.

To create an opportunity for an existing consumer customer:

1. Log in to Sterling Field Sales.

2. In the application home page, perform one of the following tasks:

    ▪ Click the **New Opportunity** hyperlink.

    ▪ Click the **Opportunities** tab. In the Opportunity home page, click the **New Opportunity** hyperlink.

    ▪ Click the **Quotes** tab. In the Quote home page, click the **New Opportunity** hyperlink.

    ▪ Under the **Create** panel in the **Navigation** panel, select **Opportunity** from the drop-down list.

       Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

3. The Select Enterprise dialog box is displayed. From the **Enterprise*** drop-down list, select the enterprise for which you want to create the opportunity, and click **Select**.

    Note: The Select Enterprise dialog box is displayed only if you have access to multiple enterprises.

4. The Create Opportunity screen is displayed. In the **Create Opportunity** panel, enter the appropriate information:

    ▪ In the **Opportunity Name*** box, enter a name for the opportunity.

    ▪ From the **Lead Origin** drop-down list, select the lead origin for the opportunity. A lead origin is the source from which the lead for the opportunity originated. For example, a lead can originate from a phone conversation, trade show, Web site, and so on.

    ▪ In the **Success %** box, enter the probability of success (in %). The probability of success (in %) is used to indicate the opportunity's chances of being successful. For example, if the opportunity has an equal chance of being a success or a failure, you can enter 50 in the box.

    ▪ Click adjacent to the **Owner ID** box to search for the user who has been assigned as the owner of the opportunity. The User Search dialog box is displayed. Enter the appropriate search criteria and click **Search**. The User ID and User Name of the users matching the search criteria are displayed in the **Search Results** panel. Select the check box adjacent to the user, and click **Select**. Alternatively, double-click the **User ID** column or click the corresponding User ID hyperlink to select the user. The User ID of the user is populated in the **Owner ID** box.

    ▪ Click adjacent to the **Anticipated Close Date** field to select the anticipated close date. This is the date by which the opportunity is expected to be closed.

- In the **Opportunity Value** box, enter the value of the opportunity. The opportunity value is the total amount that will be earned as revenue if a quote for the opportunity is accepted by the customer. The currency for the opportunity value is the currency defined for the enterprise for which you are creating the opportunity.

- Click 🔍 adjacent to the **Co-Owner ID** box to search for the user who has been assigned as the co-owner of the opportunity. A co-owner is the secondary owner of an opportunity. The User Search dialog box is displayed. Enter the appropriate search criteria and click **Search**. The User ID and User Name of the users matching the search criteria are displayed in the **Search Results** panel. Select the check box adjacent to the user, and click **Select**. Alternatively, double-click the **User ID** column or click the corresponding User ID hyperlink to select the user. The User ID of the user is populated in the **Co-Owner ID** box.

5. In the **Customer** panel, perform the following steps:

   a. Select the **Existing Customer*** radio button.

   b. Click 🔍 adjacent to the **Existing Customer** radio button to search for the customer.

   c. The Customer Search dialog box is displayed. Depending on the **Customer Type** you want to search for, select either the **Business** radio button or the **Consumer** radio button.

   d. Enter the other search criteria and click **Search**.

   e. The list of customers matching the search criteria is displayed in the **Search Results** panel. Select the check box adjacent to the relevant 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 box adjacent to the **Existing Customer** radio button.

6. Click **Save**.

   Note: * indicates that the field is mandatory.

   The Opportunity Details screen containing the details of the newly created opportunity is displayed.

Modify Customer Details

When creating an opportunity for an existing consumer customer, you can modify the details of the customer, such as the phone number, e-mail address, and so on.

To modify the details of a consumer customer:

1. In the Create Opportunity screen, under the **Customer** panel, click the **Edit** hyperlink in the **Contact** panel.

2. The Edit Contact dialog box is displayed. Modify the following fields, as appropriate:

   - 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.

   - To choose 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 for the customer, for example, Mrs, Dr, and so on.
- In the **Company** box, enter the name of the company.
- 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 that you select and the postal code that you enter.
- Select either of the following radio buttons:

  - Commercial: Select this if the address is the commercial address of the customer.

  - Residential: Select this if the address is the residential address of the customer.

3. Click **Save**.
4. If the address that you entered is not valid, the Select Address dialog box displays the valid addresses that are closest to the one that you entered. Select the appropriate option and click **Save** to return to the Create Opportunity screen.
5. Click **Save** in the Create Opportunity screen.

Note: * indicates that the field is mandatory.

Add a Note to an Opportunity

During the process of creating an opportunity for a customer, you can add notes, which can be used for future reference. For example, you can add notes explaining why an opportunity has been created.

To add a note to an opportunity, in the **Notes** panel of the Create Opportunity screen, enter the note text and click **Save**.

Create an Opportunity for a New Business Customer

You can create an opportunity for a new business customer whose records do not exist in the system. For example, if you learn from a source that a business organization is looking to purchase computers on a large scale for its new operations in a region, you can create an opportunity for that organization. You can later use that opportunity to present quotes for computers to that organization.

To create an opportunity for a new business customer:

1. Log in to Sterling Field Sales.

2. In the application home page, perform one of the following tasks:

   · Click the **New Opportunity** hyperlink.

   · Click the **Opportunities** tab. In the Opportunity home page, click the **New Opportunity** hyperlink.

   · Click the **Quotes** tab. In the Quote home page, click the **New Opportunity** hyperlink.

   · Under the **Create** panel in the **Navigation** panel, select **Opportunity** from the drop-down list.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

3. The Select Enterprise dialog box is displayed. From the **Enterprise*** drop-down list, select the enterprise for which you want to create the opportunity, and click **Select**.

   Note: The Select Enterprise dialog box is displayed only if you have access to multiple enterprises.

4. The Create Opportunity screen is displayed. In the **Create Opportunity** panel, enter the appropriate information:

   · In the **Opportunity Name*** box, enter a name for the opportunity.

   · From the **Lead Origin** drop-down list, select the lead origin for the opportunity. A lead origin is the source from which the lead for the opportunity originated. For example, a lead can originate from a phone conversation, trade show, Web site, and so on.

   · In the **Success %** box, enter the probability of success (in %). The probability of success (in %) is used to indicate the opportunity's chances of being successful. For example, if the opportunity has an equal chance of being a success or a failure, you can enter 50 in the box.

   · Click adjacent to the **Owner ID** box to search for the user who has been assigned as the owner of the opportunity. The User Search dialog box is displayed. Enter the appropriate search criteria and click **Search**. The User ID and User Name of the users matching the search criteria are displayed in the **Search Results** panel. Select the check box adjacent to the user, and click **Select**. Alternatively, double-click the **User ID** column or click the corresponding User ID hyperlink to select the user. The User ID of the user is populated in the **Owner ID** box.

   · Click adjacent to the **Anticipated Close Date** field to select the anticipated close date. This is the date by which the opportunity is expected to be closed.

   · In the **Opportunity Value** box, enter the value of the opportunity. The opportunity value is the total amount that will be earned as revenue if a quote for the opportunity is accepted by the

customer. The currency for the opportunity value is the currency defined for the enterprise for which you are creating the opportunity.

- Click 🔎 adjacent to the **Co-Owner ID** box to search for the user who has been assigned as the co-owner of the opportunity. A co-owner is the secondary owner of an opportunity. The User Search dialog box is displayed. Enter the appropriate search criteria and click **Search**. The User ID and User Name of the users matching the search criteria are displayed in the **Search Results** panel. Select the check box adjacent to the user, and click **Select**. Alternatively, double-click the **User ID** column or click the corresponding User ID hyperlink to select the user. The User ID of the user is populated in the **Co-Owner ID** box.

5. In the **Customer** panel, select the **New Customer** radio button, and then select the **Business** radio button. Enter the following information, as appropriate:

- In the **First Name*** box, enter the first name of the contact.
- In the **Last Name*** box, enter the last name of the contact.
- In the **MI** box, enter the middle initial of the contact.
- From the **Title** drop-down list, select the title for the contact, for example, Mrs, Dr, and so on.
- In the **Phone No*** box, enter the phone number of the contact.

   Note: The format for the phone number is based on your locale.

- In the **E-mail Address*** box, enter the e-mail address of the contact.
- In the **Company*** box, enter the name of the company.
- From the **Default Currency** drop-down list, select the currency to be used. By default, the currency that is defined for the enterprise is populated.
- In the **Web URL** box, enter the URL that will be used to access the customer's Web site, for example, http://www.sterlingcommerce.com.
- In the **Address** boxes, enter the sold to address information pertaining to the contact.
- From the **Country*** drop-down list, select the country in which the contact resides.
- In the **Postal Code** box, enter the postal code of the city in which the contact resides.
- In the **City** box, enter the name of the city in which the contact resides.
- In the **State** field, enter the name of the state in which the contact resides. Based on the way it is configured by your administrator, the **State** field is either displayed as a a box or a drop-down list.

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

- Select either of the following radio buttons:

   - Commercial: Select this if the address is the commercial address of the contact.

   - Residential: Select this if the address is the residential address of the contact.

6. Click **Save**.

   Note: * indicates that the field is mandatory.

   The Opportunity Details screen with the details of the newly created opportunity is displayed.

Add a Note to an Opportunity

During the process of creating an opportunity for a new business customer, you can add notes, which can be used for future reference. For example, you can add notes explaining why an opportunity has been created for a new customer.

To add a note to an opportunity, in the **Notes** panel of the Create Opportunity screen, enter the note text and click **Save**.

Create an Opportunity for a New Consumer Customer

You can create an opportunity for a new consumer customer. For example, if you learn from a source that a person who has just moved into a new town wants to purchase furniture, you can create an opportunity for that person and use that opportunity to present one or more quotes for furniture to that person.

To create an opportunity for a new consumer customer:

1. Log in to Sterling Field Sales.

2. In the application home page, perform one of the following tasks:

    - Click the **New Opportunity** hyperlink.

    - Click the **Opportunities** tab. In the Opportunity home page, click the **New Opportunity** hyperlink.

    - Click the **Quotes** tab. In the Quote home page, click the **New Opportunity** hyperlink.

    - Under the **Create** panel in the **Navigation** panel, select **Opportunity** from the drop-down list.

        Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

3. The Select Enterprise dialog box is displayed. From the **Enterprise*** drop-down list, select the enterprise for which you want to create the opportunity, and click **Select**.

    Note: The Select Enterprise dialog box is displayed only if you have access to multiple enterprises.

4. The Create Opportunity screen is displayed. In the **Create Opportunity** panel, enter the appropriate information:

    - In the **Opportunity Name*** box, enter a name for the opportunity.

    - From the **Lead Origin** drop-down list, select the lead origin for the opportunity. A lead origin is the source from which the lead for the opportunity originated. For example, a lead can originate from a phone conversation, trade show, Web site, and so on.

    - In the **Success %** box, enter the probability of success (in %). The probability of success (in %) is used to indicate the opportunity's chances of being successful. For example, if the opportunity has an equal chance of being a success or a failure, you can enter 50 in the box.

    - Click 🔍 adjacent to the **Owner ID** box to search for the user who has been assigned as the owner of the opportunity. The User Search dialog box is displayed. Enter the appropriate search criteria and click **Search**. The User ID and User Name of the users matching the search criteria are displayed in the **Search Results** panel. Select the check box adjacent to the user, and click **Select**. Alternatively, double-click the **User ID** column or click the corresponding User ID hyperlink to select the user. The User ID of the user is populated in the **Owner ID** box.

    - Click 📆 adjacent to the **Anticipated Close Date** field to select the anticipated close date. This is the date by which the opportunity is expected to be closed.

    - In the **Opportunity Value** box, enter the value of the opportunity. The opportunity value is the total amount that will be earned as revenue if a quote for the opportunity is accepted by the

customer. The currency for the opportunity value is the currency defined for the enterprise for which you are creating the opportunity.

- Click 🔍 adjacent to the **Co-Owner ID** box to search for the user who has been assigned as the co-owner of the opportunity. A co-owner is the secondary owner of an opportunity. The User Search dialog box is displayed. Enter the appropriate search criteria and click **Search**. The User ID and User Name of the users matching the search criteria are displayed in the **Search Results** panel. Select the check box adjacent to the user, and click **Select**. Alternatively, double-click the **User ID** column or click the corresponding User ID hyperlink to select the user. The User ID of the user is populated in the **Co-Owner ID** box.

5. In the **Customer** panel, select the **New Customer** radio button, and then select the **Consumer** radio button. Enter the following information, as appropriate:

- 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 for the customer, for example, Mrs, Dr, and so on.
- In the **Phone No*** box, enter the phone number of the customer.

  Note: The format for the phone number is based on your locale.

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

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

- Select either of the following radio buttons:

  - Commercial: Select this if the address is the commercial address of the customer.

  - Residential: Select this if the address is the residential address of the customer.

6. Click **Save**.

   Note: * indicates that the field is mandatory.

   The Opportunity Details screen with the details of the newly created opportunity is displayed.

Add a Note to an Opportunity

During the process of creating an opportunity for a new consumer customer, you can add notes, which can be used for future reference. For example, you can add notes explaining why an opportunity has been created for a new customer.

To add a note to an opportunity, in the **Notes** panel of the Create Opportunity screen, enter the note text and click **Save**.

Search for an Opportunity

You can search for an opportunity and view the details of the opportunity. As a field sales representative, you may want to see the details of an opportunity, such as the status, the date on which the opportunity is expected to be closed, the notes added to the opportunity, and so on. To view the details of an opportunity, you must first search for the corresponding opportunity.

To search for an opportunity:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

    ￮ Click the **Find Opportunity** hyperlink.

    ￮ Click the **Opportunities** tab. In the Opportunity home page, click the **Find Opportunity** hyperlink.

    ￮ Click the **Quotes** tab. In the Quote home page, click the **Find Opportunity** hyperlink.

    ￮ Under the **Navigation** panel, click **Search...**, enter the name of the opportunity as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

    Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

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

    However, if the opportunity that you are searching for is not displayed in the **Matches on Opportunities** panel, click **Advanced Opportunity Search**.

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

    ￮ From the **Enterprise** drop-down list, select the enterprise for which the opportunity was created. This drop-down list displays all the enterprises that you have access to.

    Note: This field is displayed only if you have access to multiple enterprises.

    ￮ In the **Opportunity 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 an opportunity whose name is ComputerSystems, you can select **starts with** from the drop-down list and enter Computer in the corresponding box.

    ￮ In the **Opportunity ID Starts With** box, enter the complete identifier of the opportunity or the initials of the opportunity identifier. If you are searching for an opportunity with opportunity123abc as the Opportunity ID, you can enter opportunity123 in the box.

    ￮ In the **Success %** field, select the appropriate operator from the drop-down list, and enter the appropriate value in the corresponding box. For example, to search for an opportunity that has equal chances of being a success and a failure, you can select **is** from the drop-down list, and enter 50 in the corresponding box.

- Click 🔍 adjacent to the **Customer ID** field to search for the customer for whom the opportunity was created. The Customer Search dialog box is displayed. Perform the following tasks:

  - From the **Enterprise** drop-down list, select the appropriate enterprise. This drop-down list displays all the enterprises to which you have access.

  - Depending on the **Customer Type** you want to search for, select either the **Business** radio button or the **Consumer** radio button.

  - Enter the other search criteria as appropriate and click **Search**.

  The 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 **Opportunity Value** field, select the appropriate operator from the drop-down list, and enter the appropriate value in the corresponding box. For example, to search for an opportunity whose value is less than $50,000, you can select **is less than** from the drop-down list and enter 50,000 in the corresponding box.

- Click 🔍 adjacent to the **Owner ID** field to search for the user who has been assigned as the owner of the opportunity. The User Search dialog box is displayed. Enter the appropriate search criteria and click **Search**. The User ID and User Name of the users matching the search criteria are displayed in the **Search Results** panel. Select the check box adjacent to the user, and click **Select**. Alternatively, double-click the **User ID** column or click the corresponding User ID hyperlink to select the user. The User ID of the user is populated in the **Owner ID** box.

- In the **Anticipated Close Date** field, select the appropriate operator from the drop-down list and click 🗓 to select the appropriate date. This is the date by which the opportunity is expected to be closed.

4. Click **Search**.

- If only one opportunity matches the search criteria, the Opportunity Details screen is displayed.

- If multiple opportunities match the search criteria, the list of opportunities is displayed in the **Search Results** panel. Click the corresponding Opportunity Name hyperlink. Alternatively, double-click the corresponding row. The Opportunity Details screen is displayed.

Save an Opportunity Search

You can save an opportunity search to avoid entering the corresponding search criteria every time you search for opportunities. For example, while performing a search for the opportunities that have been assigned to a particular owner, you can save the search so that you do not have to enter the search criteria every time you want to search for opportunities owned by that user.

To save an opportunity search:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   - Click the **Find Opportunity** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Opportunity** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **Find Opportunity** hyperlink.

   - Under the **Navigation** panel, click **Search...**, enter the name of the opportunity as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

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

     However, if the opportunity that you are searching for is not displayed in the **Matches on Opportunities** panel, click **Advanced Opportunity Search**.

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

   - From the **Enterprise** drop-down list, select the enterprise for which the opportunity was created. This drop-down list displays all the enterprises that you have access to.

     Note: This field is displayed only if you have access to multiple enterprises.

   - In the **Opportunity 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 an opportunity whose name is ComputerSystems, you can select **starts with** from the drop-down list and enter Computer in the corresponding box.

   - In the **Opportunity ID Starts With** box, enter the complete identifier of the opportunity or the initials of the opportunity identifier. If you are searching for an opportunity with opportunity123abc as the Opportunity ID, you can enter opportunity123 in the box.

   - In the **Success %** field, select the appropriate operator from the drop-down list, and enter the appropriate value in the corresponding box. For example, to search for an opportunity that has equal chances of being a success and a failure, you can select **is** from the drop-down list, and enter 50 in the corresponding box.

- Click 🔍 adjacent to the **Customer ID** field to search for the customer for whom the opportunity was created. The Customer Search dialog box is displayed. Perform the following tasks:

  - From the **Enterprise** drop-down list, select the appropriate enterprise. This drop-down list displays all the enterprises to which you have access.

  - Depending on the **Customer Type** you want to search for, select either the **Business** radio button or the **Consumer** radio button.

  - Enter the other search criteria as appropriate and click **Search**.

  The 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 **Opportunity Value** field, select the appropriate operator from the drop-down list, and enter the appropriate value in the corresponding box. For example, to search for an opportunity whose value is less than $50,000, you can select **is less than** from the drop-down list and enter 50,000 in the corresponding box.

- Click 🔍 adjacent to the **Owner ID** field to search for the user who has been assigned as the owner of the opportunity. The User Search dialog box is displayed. Enter the appropriate search criteria and click **Search**. The User ID and User Name of the users matching the search criteria are displayed in the **Search Results** panel. Select the check box adjacent to the user, and click **Select**. Alternatively, double-click the **User ID** column or click the corresponding User ID hyperlink to select the user. The User ID of the user is populated in the **Owner ID** box.

- In the **Anticipated Close Date** field, select the appropriate operator from the drop-down list and click 📅 to select the appropriate date. This is the date by which the opportunity is expected to be closed.

4. Click **Create Saved Search**.
5. The Saved Search dialog box is displayed. Perform the following steps:

   a. In the **Saved Search Name*** box, enter a name for the search that is to be saved.

   b. Click **Save**.

   Note: * indicates that the field is mandatory.

   The saved search is created and the Saved Search dialog box is closed.

Modify Opportunity Details

After an opportunity is created for a customer, you can modify the details of the opportunity. For example, if the opportunity is expected to be closed at a date later than the one you had earlier projected, you can change the opportunity's Anticipated Close Date by selecting a new date.

To modify the details of an opportunity:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   · Click the **Find Opportunity** hyperlink.

   · Click the **Opportunities** tab. In the Opportunity home page, click the **Find Opportunity** hyperlink.

   · Click the **Quotes** tab. In the Quote home page, click the **Find Opportunity** hyperlink.

   · Navigate to the Quote Summary screen or the Quote Details screen, and then click the Opportunity Name hyperlink. In this scenario, ignore steps 3 and 4.

   · Under the **Navigation** panel, click **Search...**, enter the name of the opportunity as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

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

     However, if the opportunity that you are searching for is not displayed in the **Matches on Opportunities** panel, click **Advanced Opportunity Search**.

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

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

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

5. The Opportunity Details screen is displayed. Modify the following fields, as required:

   · **Opportunity Name*:** Modify this field by entering a new name for the opportunity.

   · **Lead Origin:** Modify this field by selecting a lead origin from the drop-down list. A lead origin is the source from which the lead for the opportunity originated. For example, a lead can originate from a phone conversation, trade show, Web site, and so on.

   · **Success %:** Modify this field by entering a new value. The probability of success (in %) is used to indicate the opportunity's chances of being successful.

   · **Owner ID:** Click 🔍 to search for the user you want to assign as the owner of the opportunity. The User Search dialog box is displayed. Enter the appropriate search criteria and click **Search**. The

User ID and User Name of the users matching the search criteria are displayed in the **Search Results** panel. Select the check box adjacent to the user, and click **Select**. Alternatively, double-click the **User ID** column or click the corresponding User ID hyperlink to select the user. The User ID of the user is populated in the **Owner ID** box.

- **Anticipated Close Date:** Modify this field by clicking [icon] and selecting the appropriate date. This is the date by which the opportunity is expected to be closed.

- **Opportunity Value:** Modify this field by entering a new opportunity value. The opportunity value is the total amount that will be earned as revenue if a quote for the opportunity is accepted by the customer.

- **Co-Owner ID:** Click [icon] to search for the user you want to assign as the co-owner of the opportunity. The User Search dialog box is displayed. Enter the appropriate search criteria and click **Search**. The User ID and User Name of the users matching the search criteria are displayed in the **Search Results** panel. Select the check box adjacent to the user, and click **Select**. Alternatively, double-click the **User ID** column or click the corresponding User ID hyperlink to select the user. The User ID of the user is populated in the **Co-Owner ID** box.

Note: After assigning an owner or a co-owner to an opportunity, you cannot unassign them. In such a scenario, you can only change the owner or co-owner of the opportunity.

6. Click **Save**.

Note: * indicates that the field is mandatory.

You can also perform the following tasks from the Opportunity Details screen:

- Modify the Owner and Co-Owner of an Opportunity
- Modify Business Customer Details in an Opportunity
- Modify Consumer Customer Details in an Opportunity
- Add a Note to an Opportunity
- Create an Alternative Quote in an Opportunity
- Create a Quote for an Opportunity
- Create a Quote and an Opportunity for an Existing Customer Using an Existing Quote
- Create a Quote and an Opportunity for a New Business Customer Using an Existing Quote
- Create a Quote and an Opportunity for a New Consumer Customer Using an Existing Quote
- Reject a Quote on Behalf of a Customer
- Document the Lessons Learnt for an Opportunity

Modify the Owner and Co-Owner of an Opportunity

You can assign an opportunity to an owner and co-owner who are different than the ones to whom you had assigned the opportunity earlier. An opportunity owner is a field sales representative who has been assigned primary ownership of an opportunity. When an opportunity is created, the user who created the opportunity is assigned as the owner by default. After the opportunity is created, you can reassign the opportunity to a different user. Similarly, you can modify the co-owner of an opportunity if you had defined the co-owner for the opportunity when you created it.

Note: After assigning an owner or a co-owner to an opportunity, you cannot unassign them. In such a scenario, you can only change the owner or co-owner of the opportunity.

To modify the owner and co-owner of an opportunity:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   - Click the **Find Opportunity** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Opportunity** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **Find Opportunity** hyperlink.

   - Navigate to the Quote Summary screen or the Quote Details screen, and then click the Opportunity Name hyperlink. In this scenario, ignore steps 3 and 4.

   - Under the **Navigation** panel, click **Search...**, enter the name of the opportunity as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

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

     However, if the opportunity that you are searching for is not displayed in the **Matches on Opportunities** panel, click **Advanced Opportunity Search**.

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

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

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

5. The Opportunity Details screen is displayed. To modify the owner of the opportunity, click 🔍 adjacent to the **Owner ID** field. To modify the co-owner of the opportunity, click 🔍 adjacent to the **Co-Owner ID** field.

6. The User Search dialog box is displayed. Perform the following tasks:

- From the **Enterprise** drop-down list, select the appropriate enterprise. This drop-down list displays all the enterprises to which you have access.

  Note: This field is displayed only if you are searching for a user without an enterprise in context.

- In the **User ID Starts With** box, enter either the complete identifier or the initials of the identifier of the user. For example, if you are searching for a user whose User ID is jcameron123, you can enter jcam as the search criteria.

- In the **User Name Contains** box, enter either the complete user name or the partial user name of the user. For example, if you are searching for a user whose User Name is lucelew, you can enter le as the search criteria.

- From the **Team** drop-down list, select the team to which the user is assigned.

7. Click **Search**.

8. The list of users matching the search criteria is displayed in the **Search Results** panel. Select the check box adjacent to the user you want to assign as the owner or the co-owner, and click **Select**.

9. The User Search dialog box is closed and the Opportunity Details screen is displayed. Click **Save**.

Modify Business Customer Details in an Opportunity

After an opportunity is created for a business customer, you can modify the customer information in the opportunity. For example, you can modify the address of a business customer's contact in the corresponding opportunity, or assign a new customer contact to the business customer.

Note: If you modify the address of a business customer's contact in an opportunity, the address information does not get updated in the quotes that are associated with that opportunity.

You can modify the following details pertaining to a business customer:

- Assign a Different Contact to a Business Customer
- Modify the Details of a Business Customer's Contact

Assign a Different Contact to a Business Customer

In a business-to-business scenario, a customer can be assigned multiple contacts. You can change a business customer's contact, who is already defined for an opportunity, by either selecting a different contact from the existing contacts for the customer, or adding a new contact for the customer.

To assign a different contact to a business customer:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   - Click the **Find Opportunity** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Opportunity** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **Find Opportunity** hyperlink.

   - Navigate to the Quote Summary screen or the Quote Details screen, and then click the Opportunity Name hyperlink. In this scenario, ignore steps 3 and 4.

   - Under the **Navigation** panel, click **Search...**, enter the name of the opportunity as the search criteria, and then click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

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

     However, if the opportunity that you are searching for is not displayed in the **Matches on Opportunities** panel, click **Advanced Opportunity Search**.

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

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

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

5. The Opportunity Details screen is displayed. In the **Contact** panel, perform either of the following tasks:

▫ To assign an existing contact to the customer, select the contact from the **Contact*** drop-down list.

▫ To assign a new contact to the customer, click the **New** hyperlink in the **Contact** panel. The Add New Contact dialog box is displayed. Enter the following information:

   ▫ In the **First Name*** box, enter the first name of the contact.

   ▫ In the **Last Name*** box, enter the last name of the contact.

   ▫ In the **MI** box, enter the middle initial of the contact.

   ▫ From the **Title** drop-down list, select the title for the contact, for example, Mrs, Dr, and so on.

   ▫ In the **Phone No*** box, enter the phone number of the contact.

      Note: The format for the phone number is based on your locale.

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

   ▫ In the **Company** box, enter the name of the company.

   ▫ In the **Address** boxes, enter the address of the contact.

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

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

   ▫ In the **City** box, enter the name of the city in which the contact resides.

   ▫ In the **State** field, enter or select the name of the state in which the contact 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 that you select and the postal code that you enter.

   ▫ Select either of the following radio buttons:

      - Commercial: Select this if the address is the commercial address of the contact.

      - Residential: Select this if the address is the residential address of the contact.

6. Click **Save**.

Note: * indicates that the field is mandatory.

Modify the Details of a Business Customer's Contact

You can modify the details of a business customer's contact for an opportunity. For example, you can modify the customer contact's phone number, e-mail address, and so on.

To modify the details of a business customer's contact:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   - Click the **Find Opportunity** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Opportunity** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **Find Opportunity** hyperlink.

   - Navigate to the Quote Summary screen or the Quote Details screen, and then click the Opportunity Name hyperlink. In this scenario, ignore steps 3 and 4.

   - Under the **Navigation** panel, click **Search...**, enter the name of the opportunity as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

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

     However, if the opportunity that you are searching for is not displayed in the **Matches on Opportunities** panel, click **Advanced Opportunity Search**.

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

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

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

5. The Opportunity Details screen is displayed. In the **Contact** panel, click the **Edit** hyperlink.

6. The Edit Contact dialog box is displayed. Modify the following fields, as appropriate:

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

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

   - To choose 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 contact.

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

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

   - From the **Title** drop-down list, select the title for the contact, for example, Mrs, Dr, and so on.

   - In the **Company** box, enter the name of the company.

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

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

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

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

- In the **State** field, enter or select the name of the state in which the contact 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 that you select and the postal code that you enter.

- Select either of the following radio buttons:

  - Commercial: Select this if the address is the commercial address of the contact.

  - Residential: Select this if the address is the residential address of the contact.

7. Click **Save**.

8. If the address that you entered is not valid, the Select Address dialog box displays the valid addresses that are closest to the one that you entered. Select the appropriate option and click **Save** to return to the Opportunity Details screen.

9. Click **Save** in the Opportunity Details screen.

Note: * indicates that the field is mandatory.

Modify Consumer Customer Details in an Opportunity

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

Note: If you modify the address of the consumer customer for an opportunity, the address information does not get updated in all the quotes that are associated with that opportunity.

To modify the details of a consumer customer for an opportunity:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

    *   Click the **Find Opportunity** hyperlink.

    *   Click the **Opportunities** tab. In the Opportunity home page, click the **Find Opportunity** hyperlink.

    *   Click the **Quotes** tab. In the Quote home page, click the **Find Opportunity** hyperlink.

    *   Navigate to the Quote Summary screen or the Quote Details screen, and then click the Opportunity Name hyperlink. In this scenario, ignore steps 3 and 4.

    *   Under the **Navigation** panel, click **Search...**, enter the name of the opportunity as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

        Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

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

        However, if the opportunity that you are searching for is not displayed in the **Matches on Opportunities** panel, click **Advanced Opportunity Search**.

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

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

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

5. The Opportunity Details screen is displayed. In the **Contact** panel, click the **Edit** hyperlink.

6. The Edit Contact dialog box is displayed. Modify the following fields, as appropriate:

    *   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.

    *   To choose 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 for the customer, for example, Mrs, Dr, and so on.
- In the **Company** box, enter the name of the company.
- 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 that you select and the postal code that you enter.
- Select either of the following radio buttons:

  - Commercial: Select this if the address is the commercial address of the customer.

  - Residential: Select this if the address is the residential address of the customer.

7. Click **Save**.
8. If the address that you entered is not valid, the Select Address dialog box displays the valid addresses that are closest to the one that you entered. Select the appropriate option and click **Save** to return to the Opportunity Details screen.
9. Click **Save** in the Opportunity Details screen.

Note: * indicates that the field is mandatory.

Add a Note to an Opportunity

Notes are a useful means of keeping track of actions that have taken place in an opportunity, and can be used for future reference. After an opportunity is created, you can add notes to the opportunity. For example, you can add notes to document all the actions that have been taken on the opportunity.

To add a note to an opportunity:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

    ·   Click the **Find Opportunity** hyperlink.

    ·   Click the **Opportunities** tab. In the Opportunity home page, click the **Find Opportunity** hyperlink.

    ·   Click the **Quotes** tab. In the Quote home page, click the **Find Opportunity** hyperlink.

    ·   Navigate to the Quote Summary screen or the Quote Details screen, and then click the Opportunity Name hyperlink. In this scenario, ignore steps 3 and 4.

    ·   Under the **Navigation** panel, click **Search...**, enter the name of the opportunity as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

        Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

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

        However, if the opportunity that you are searching for is not displayed in the **Matches on Opportunities** panel, click **Advanced Opportunity Search**.

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

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

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

5. The Opportunity Details screen is displayed. In the **Notes** panel, click **View/Add Notes**.

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 and return to the Opportunity Details screen.

Document the Lessons Learnt for an Opportunity

You can mark an opportunity as Lost if the opportunity no longer serves the necessary purpose, and document the lessons learnt in the context of this opportunity. For example, when an opportunity is still in the **Inquiry** status, a customer may have purchased the products from another seller. In such a scenario, you may want to mark the opportunity as Lost. When you mark an opportunity as Lost, it is mandatory that you provide a reason for losing the opportunity.

Note: When an opportunity moves to the **Lost** status, you cannot perform any modifications on the opportunity.

To mark an opportunity as Lost, and record the reasons for the loss:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   · Click the **Find Opportunity** hyperlink.

   · Click the **Opportunities** tab. In the Opportunity home page, click the **Find Opportunity** hyperlink.

   · Click the **Quotes** tab. In the Quote home page, click the **Find Opportunity** hyperlink.

   · Navigate to the Quote Summary screen or the Quote Details screen, and then click the Opportunity Name hyperlink. In this scenario, ignore steps 3 and 4.

   · Under the **Navigation** panel, click **Search...**, enter the name of the opportunity as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

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

     However, if the opportunity that you are searching for is not displayed in the **Matches on Opportunities** panel, click **Advanced Opportunity Search**.

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

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

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

5. The Opportunity Details screen is displayed. Under the **Tasks** panel, click **Mark as Lost**.

6. The Mark as Lost screen is displayed. Perform the following steps:

   · From the **Loss Reason*** drop-down list, select the reason code you want to use. The reason code is used to determine the reason why the opportunity is being marked as **Lost**, for example, Project Canceled, Project Delayed, Competitor Price, and so on.

- 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 why you lost the opportunity, whether you lost the opportunity to a market competitor, and so on.

Note: * indicates that the field is mandatory.

7. Click **Confirm**.

The Opportunity Details screen is displayed, with the status of the opportunity changed to **Lost**.

Create a Quote for an Opportunity

After an opportunity is created, you can create a quote for the opportunity. You can then define the products and pricing adjustments, and the shipment and payment terms for the quote. When a quote is created for an existing opportunity, the customer who is assigned to the opportunity is automatically assigned to the quote.

To create a quote for an opportunity:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

    ⌑ Click the **Find Opportunity** hyperlink.

    ⌑ Click the **Opportunities** tab. In the Opportunity home page, click the **Find Opportunity** hyperlink.

    ⌑ Click the **Quotes** tab. In the Quote home page, click the **Find Opportunity** hyperlink.

    ⌑ Navigate to the Quote Summary screen or the Quote Details screen, and then click the Opportunity Name hyperlink. In this scenario, ignore steps 3 and 4.

    ⌑ Under the **Navigation** panel, click **Search...**, enter the name of the opportunity as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

        Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

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

        However, if the opportunity that you are searching for is not displayed in the **Matches on Opportunities** panel, click **Advanced Opportunity Search**.

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

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

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

5. The Opportunity Details screen is displayed. In the **Quotes** panel, click **New**.

    Note: The **New** button is displayed only if there are no quotes associated with the opportunity.

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

    The quote is created for the opportunity and the Quote Details screen pertaining to the newly created quote is displayed.

Note: * indicates that the field is mandatory.

Create a Quote

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. You can either create a quote for an existing opportunity or create a quote even without the existence of an opportunity for it. If you create a quote without a pre-existing opportunity, the opportunity is automatically created when the quote is created.

You can create a quote for an existing customer, a new business customer, or a new consumer customer.

The quote creation process involves the following tasks:

* Associating an opportunity to the quote. An opportunity can be associated to a quote either explicitly or implicitly. You can associate an opportunity to a quote by creating a quote for the opportunity. An opportunity can also be associated to a quote when the quote is created without an opportunity in context. In such a scenario, the opportunity is automatically created for the quote.

* Defining the details of the customer for whom you are creating the quote.

To create a quote without a pre-existing opportunity:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   - Click the **New Quote** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **New Quote** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **New Quote** hyperlink.

   - Under the **Create** panel in the **Navigation** panel, select **Quote** from the drop-down list.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

3. The Select Enterprise dialog box is displayed. From the **Enterprise*** drop-down list, select the enterprise for which you want to create the quote, and click **Select**.

   Note: The Select Enterprise dialog box is displayed only if you have access to multiple enterprises.

4. The Create Quote screen is displayed.

   The following table describes the fields displayed in the Create Quote screen:

Field Desc	ription
Name*	The name of the quote.
Expiration Date	The expiration date is the date by which the quote will expire. If the expiration date is not defined at the time of creating the quote, the date will be defaulted based on the configuration.
Existing Customer	Use this radio button to select a customer from the list of existing customers. An existing customer is a customer whose records already exist in the system.
New Customer	Use this radio button to define the customer details of a new business customer or consumer customer.

Note: * indicates that the field is mandatory.

You can perform the following tasks:

- Create a Quote for an Existing Business Customer
- Create a Quote for an Existing Consumer Customer
- Create a Quote for a New Business Customer
- Create a Quote for a New Consumer Customer

Create a Quote for an Existing Business Customer

You can create a quote for an existing business customer when an opportunity is not yet created for the quote. When you create the quote, the opportunity for the quote is automatically created. An existing customer is a customer whose records already exist in the system.

The quote creation process involves the following tasks:

- Associating an opportunity to the quote. When you create a quote without an opportunity in context, the opportunity is automatically created for the quote.
- Defining the details of the customer such as the addresses and so on.

To create a quote for an existing business customer:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   - Click the **New Quote** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **New Quote** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **New Quote** hyperlink.

   - Under the **Create** panel in the **Navigation** panel, select **Quote** from the drop-down list.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

3. The Select Enterprise dialog box is displayed. From the **Enterprise*** drop-down list, select the enterprise for which you want to create the quote, and click **Select**.

   Note: The Select Enterprise dialog box is displayed only if you have access to multiple enterprises.

4. The Create Quote screen is displayed. In the **Primary Information** panel, perform the following tasks:

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

   - 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.

5. In the **Customer** panel, perform the following steps:

   a. Select the **Existing Customer*** radio button.

   b. Click 🔍 adjacent to the **Existing Customer** radio button to search for the customer.

   c. The Customer Search dialog box is displayed. Select the **Business** radio button.

   d. Enter the other search criteria and click **Search**.

   e. The list of customers matching the search criteria is displayed in the **Search Results** panel. Select the check box adjacent to the relevant 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 box adjacent to the **Existing Customer** radio button.

6. Click **Save**.

   Note: * indicates that the field is mandatory.

   The Quote Details screen with the details of the newly created quote is displayed.

After defining the customer details, you can add products to the quote, define the quantity and adjust the price of the products, and define the payment and shipment terms.

Assign a Different Contact

When creating a quote for an existing business customer, you can assign a different contact to this business customer.

To assign a different business customer contact:

1. In the Create Quote screen, under the **Customer** panel, select a different contact from the **Contact*** drop-down list. Alternatively, click the **New** hyperlink in the **Contact** panel. The Add New Contact dialog box is displayed. Enter the following information, as appropriate, and click **Save**:

   ⁃ In the **First Name*** box, enter the first name of the contact.

   ⁃ In the **Last Name*** box, enter the last name of the contact.

   ⁃ In the **MI** box, enter the middle initial of the contact.

   ⁃ From the **Title** drop-down list, select the title for the contact, for example, Mrs, Dr, and so on.

   ⁃ In the **Phone No*** box, enter the phone number of the contact.

     Note: The format for the phone number is based on your locale.

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

   ⁃ In the **Company** box, enter the name of the company.

   ⁃ In the **Address** boxes, enter the address of the contact.

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

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

   ⁃ In the **City** box, enter the name of the city in which the contact resides.

   ⁃ In the **State** field, enter or select the name of the state in which the contact 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 that you select and the postal code that you enter.

   ⁃ Select either of the following radio buttons:

     - Commercial: Select this if the address is the commercial address of the contact.

     - Residential: Select this if the address is the residential address of the contact.

   Note: * indicates that the field is mandatory.

2. Click **Save**.

    The information pertaining to the contact is displayed under the **Contact** panel.

Modify Contact Details

When creating a quote for an existing business customer, you can modify the details of the business customer's contact, such as the phone number or the e-mail address.

To modify the details of a business customer's contact:

1. In the Create Quote screen, under the **Customer** panel, click the **Edit** hyperlink in the **Contact** panel.
2. The Edit Contact dialog box is displayed. Modify the following fields, as appropriate:

    -   In the **Phone No*** box, enter the phone number of the contact.
    -   In the **E-mail Address*** box, enter the e-mail address of the contact.

    Note: * indicates that the field is mandatory.

3. Click **Save**. The Edit Contact dialog box is closed and the Create Quote screen is displayed.
4. Click **Save** in the Create Quote screen.

Modify Ship To Address

When creating a quote for an existing business customer, you can modify the default Ship To address of that customer.

To modify the Ship To address:

1. In the Create Quote screen, under the **Customer** panel, click the **Edit** hyperlink in the **Shipping Address** panel.
2. The Edit Address dialog box is displayed. Modify the following fields, as appropriate:

    -   To choose 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 contact.
    -   In the **Last Name*** box, enter the last name of the contact.
    -   In the **MI** box, enter the middle initial of the contact.
    -   From the **Title** drop-down list, select the title for the contact, for example, Mrs, Dr, and so on.
    -   In the **Company** box, enter the name of the company.
    -   In the **Address** boxes, enter the address of the contact.
    -   From the **Country*** drop-down list, select the country in which the contact resides.
    -   In the **Postal Code** box, enter the postal code of the city in which the contact resides.
    -   In the **City** box, enter the name of the city in which the contact resides.

- In the **State** field, enter or select the name of the state in which the contact 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 that you select and the postal code that you enter.

- Select either of the following radio buttons:

  - Commercial: Select this if the address is the commercial address of the contact.

  - **Residential**: Select this if the address is the residential address of the contact.

  Note: * indicates that the field is mandatory.

3. Click **Save**.

4. If the address that you entered is not valid, the Select Address dialog box displays the valid addresses that are closest to the one that you entered. Select the appropriate option and click **Save**.

5. Click **Save** in the Create Quote screen.

Modify Bill To Address

When creating a quote for an existing business customer, you can modify the default Bill To address of the customer.

To modify the Bill To address:

1. In the Create Quote screen, under the **Customer** panel, click the **Edit** hyperlink in the **Billing Address** panel.

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

   - To choose 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 contact.

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

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

   - From the **Title** drop-down list, select the title for the contact, for example, Mrs, Dr, and so on.

   - In the **Company** box, enter the name of the company.

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

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

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

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

   - In the **State** field, enter or select the name of the state in which the contact 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 that you select and the postal code that you enter.

- Select either of the following radio buttons:

  - Commercial: Select this if the address is the commercial address of the contact.

  - **Residential**: Select this if the address is the residential address of the contact.

Note: * indicates that the field is mandatory.

3. Click **Save**.

4. If the address that you entered is not valid, the Select Address dialog box displays the valid addresses that are closest to the one that you entered. Select the appropriate option and click **Save**.

5. Click **Save** in the Create Quote screen.

Create a Quote for an Existing Consumer Customer

You can create a quote for an existing consumer customer when an opportunity is not yet created for the quote. When you create the quote, the opportunity for the quote is automatically created. An existing consumer customer is a consumer customer whose records already exist in the system.

The quote creation process involves the following tasks:

- Associating an opportunity to the quote. When you create a quote without an opportunity in context, the opportunity is automatically created for the quote.
- Defining the details of the customer such as the addresses and so on.

To create a quote for an existing consumer customer:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   - Click the **New Quote** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **New Quote** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **New Quote** hyperlink.

   - Under the **Create** panel in the **Navigation** panel, select **Quote** from the drop-down list.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

3. The Select Enterprise dialog box is displayed. From the **Enterprise*** drop-down list, select the enterprise for which you want to create the quote, and click **Select**.

   Note: The Select Enterprise dialog box is displayed only if you have access to multiple enterprises.

4. The Create Quote screen is displayed. In the **Primary Information** panel, perform the following tasks:

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

   - 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.

5. In the **Customer** panel, perform the following steps:

   a. Select the **Existing Customer*** radio button.

   b. Click 🔍 adjacent to the **Existing Customer** radio button to search for the customer.

   c. The Customer Search dialog box is displayed. Select the **Consumer** radio button.

   d. Enter the other search criteria and click **Search**.

   e. The list of customers matching the search criteria is displayed in the **Search Results** panel. Select the check box adjacent to the relevant 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 box adjacent to the **Existing Customer** radio button.

6. Click **Save**.

   Note: * indicates that the field is mandatory.

   The Quote Details screen of the newly created quote is displayed.

After defining the customer details, you can add products to the quote, define the quantity and adjust the price of the products, and define the payment terms and shipment terms.

Modify Consumer Customer Details

When creating a quote for an existing consumer customer, you can modify the details of the customer.

To modify the details of a consumer customer:

1. In the Create Quote screen, under the **Customer** panel, click the **Edit** hyperlink in the **Contact** panel.

2. The Edit Contact dialog box is displayed. Modify the following fields, as appropriate:

   - 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.

3. Click **Save**. The Edit Contact dialog box is closed and the Create Quote screen is displayed.

4. Click **Save** in the Create Quote screen.

Modify Ship To Address

When creating a quote for an existing consumer customer, you can modify the default Ship To address of the customer.

To modify the Ship To address:

1. In the Create Quote screen, under the **Customer** panel, click the **Edit** hyperlink in the **Shipping Address** panel.

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

   - To choose 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 for the customer, for example, Mrs, Dr, and so on.

   - In the **Company** box, enter the name of the company.

   - 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 that you select and the postal code that you enter.
- Select either of the following radio buttons:

  - Commercial: Select this if the address is the commercial address of the customer.

  - **Residential**: Select this if the address is the residential address of the customer.

  Note: * indicates that the field is mandatory.
3. Click **Save**.
4. If the address that you entered is not valid, the Select Address dialog box displays the valid addresses that are closest to the one that you entered. Select the appropriate option and click **Save**.
5. Click **Save** in the Create Quote screen.

Modify Bill To Address

When creating a quote for an existing consumer customer, you can modify the default Bill To address of the customer.

To define the Bill To address:

1. In the Create Quote screen, under the **Customer** panel, click the **Edit** hyperlink in the **Billing Address** panel.
2. The Edit Address dialog box is displayed. Modify the following fields, as appropriate:
   - To choose 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 for the customer, for example, Mrs, Dr, and so on.
   - In the **Company** box, enter the name of the company.
   - 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.

ı   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 that you select and the postal code that you enter.

ı   Select either of the following radio buttons:

- Commercial: Select this if the address is the commercial address of the customer.

- **Residential**: Select this if the address is the residential address of the customer.

Note: * indicates that the field is mandatory.

3. Click **Save**.

4. If the address that you entered is not valid, the Select Address dialog box displays the valid addresses that are closest to the one that you entered. Select the appropriate option and click **Save**.

5. Click **Save** in the Create Quote screen.

Create a Quote for a New Business Customer

You can create a quote for a new business customer when an opportunity is not yet created for the quote. When you create the quote, the opportunity for the quote is automatically created.

The quote creation process involves the following tasks:

- Associating an opportunity to the quote. When you create a quote without an opportunity in context, the opportunity is automatically created for the quote.
- Defining the details of the customer such as the addresses and so on.

To create a quote for a new business customer:

1. Log in to Sterling Field Sales.
2. The application home page is displayed. Perform one of the following tasks:
    - Click the **New Quote** hyperlink.
    - Click the **Opportunities** tab. In the Opportunity home page, click the **New Quote** hyperlink.
    - Click the **Quotes** tab. In the Quote home page, click the **New Quote** hyperlink.
    - Under the **Create** panel in the **Navigation** panel, select **Quote** from the drop-down list.

        Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.
3. The Select Enterprise dialog box is displayed. From the **Enterprise*** drop-down list, select the enterprise for which you want to create the quote, and click **Select**.

    Note: The Select Enterprise dialog box is displayed only if you have access to multiple enterprises.
4. The Create Quote screen is displayed. In the **Primary Information** panel, perform the following tasks:
    - In the **Name*** box, enter a name for the quote.
    - 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.
5. In the **Customer** panel, select the **New Customer** radio button, and then select the **Business** radio button. Enter the following information, as appropriate:
    - In the **First Name*** box, enter the first name of the contact.
    - In the **Last Name*** box, enter the last name of the contact.
    - In the **MI** box, enter the middle initial of the contact.
    - From the **Title** drop-down list, select the title for the contact, for example, Mrs, Dr, and so on.
    - In the **Phone No*** box, enter the phone number of the contact.

        Note: The format for the phone number is based on your locale.
    - In the **E-mail Address*** box, enter the e-mail address of the contact.

- In the **Company*** box, enter the name of the company.

- From the **Default Currency** drop-down list, select the currency to be used. By default, the currency that is defined for the enterprise is populated.

- In the **Web URL** box, enter the URL that will be used to access the customer's Web site, for example, http://www.sterlingcommerce.com.

- In the **Address** boxes, enter the sold to address information pertaining to the contact.

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

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

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

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

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

- Select either of the following radio buttons:

    - Commercial: Select this if the address is the commercial address of the contact.

    - **Residential**: Select this if the address is the residential address of the contact.

6. Click **Save**.

    Note: * indicates that the field is mandatory.

    The Quote Details screen of the newly created quote is displayed.

After defining the customer details, you can add products to the quote, define the quantity and adjust the price of the products, and define the payment terms and shipment terms.

Create a Quote for a New Consumer Customer

You can create a quote for a new consumer customer when an opportunity is not yet created for the quote. When you create the quote, the opportunity for the quote is automatically created.

The quote creation process involves the following tasks:

- Associating an opportunity to the quote. When you create a quote without an opportunity in context, the opportunity is automatically created for the quote.
- Defining the details of the customer such as the addresses and so on.

To create a quote for a new consumer customer:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   - Click the **New Quote** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **New Quote** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **New Quote** hyperlink.

   - Under the **Create** panel in the **Navigation** panel, select **Quote** from the drop-down list.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

3. The Select Enterprise dialog box is displayed. From the **Enterprise*** drop-down list, select the enterprise for which you want to create the quote, and click **Select**.

   Note: The Select Enterprise dialog box is displayed only if you have access to multiple enterprises.

4. The Create Quote screen is displayed. In the **Primary Information** panel, perform the following tasks:

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

   - Click [icon] 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.

5. In the **Customer** panel, select the **New Customer** radio button, and then select the **Consumer** radio button. Enter the following information, as appropriate:

   - 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 for the customer, for example, Mrs, Dr, and so on.

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

     Note: The format for the phone number is based on your locale.

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

- In the **Company*** box, enter the name of the company.

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

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

- Select either of the following radio buttons:

  - Commercial: Select this if the address is the commercial address of the customer.

  - **Residential**: Select this if the address is the residential address of the customer.

6. Click **Save**.

   Note: * indicates that the field is mandatory.

   The Quote Details screen of the newly created quote is displayed.

After defining the customer details, you can add products to the quote, define the quantity and adjust the price of the products, and define the payment terms and shipment terms.

Create an Alternative Quote in an Opportunity

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.

Create an Alternative Quote from the Opportunity Details Screen

To create an alternative quote from the Opportunity Details screen:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   ▪ Click the **Find Opportunity** hyperlink.

   ▪ Click the **Opportunities** tab. In the Opportunity home page, click the **Find Opportunity** hyperlink.

   ▪ Click the **Quotes** tab. In the Quote home page, click the **Find Opportunity** hyperlink.

   ▪ Navigate to the Quote Summary screen or the Quote Details screen, and then click the Opportunity Name hyperlink. In this scenario, ignore steps 3 and 4.

   ▪ Under the **Navigation** panel, click **Search...**, enter the name of the opportunity as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

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

     However, if the opportunity that you are searching for is not displayed in the **Matches on Opportunities** panel, click **Advanced Opportunity Search**.

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

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

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

5. The Opportunity Details screen is displayed. In the **Quotes** panel, select the check box corresponding to the quote you want to copy, and click **Copy as Alternative**.

    Notes:

    ⫶   The **Copy as Alternative** button is displayed only if there is at least one quote associated with the opportunity.

    ⫶   You can copy only one quote at a time.

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.

Create an Alternative Quote from the Quote Summary Screen

To create an alternative quote from the Quote Summary screen:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

    ⫶   Click the **Find Quote** hyperlink.

    ⫶   Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

    ⫶   Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

    ⫶   Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

    ⫶   Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

        Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

        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. Under the **Tasks** panel, click **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 of 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
- 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 of a Product as a Recommended Product
- Configure or Reconfigure a Product in a Quote
- Define the Payment Terms and Shipment Terms for a Quote

Create a Quote and an Opportunity for an Existing Customer Using an Existing Quote

You can copy a quote and create a new quote and a new opportunity for an existing customer. For example, you may want to use an existing quote, which you had created for a customer, for a different customer. In such a scenario, you can copy the quote along with the product information, and payment and shipment terms, and then define the customer information to create a new quote and opportunity for the new customer.

You can create a quote and an opportunity for an existing customer using an existing quote from either the Opportunity Details screen or the Quote Summary screen.

Create a Copy of a Quote from the Opportunity Details Screen

To create a copy of a quote from the Opportunity Details screen:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   · Click the **Find Opportunity** hyperlink.

   · Click the **Opportunities** tab. In the Opportunity home page, click the **Find Opportunity** hyperlink.

   · Click the **Quotes** tab. In the Quote home page, click the **Find Opportunity** hyperlink.

   · Navigate to the Quote Summary screen or the Quote Details screen, and then click the Opportunity Name hyperlink. In this scenario, ignore steps 3 and 4.

   · Under the **Navigation** panel, click **Search...**, enter the name of the opportunity as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

   Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

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

   However, if the opportunity that you are searching for is not displayed in the **Matches on Opportunities** panel, click **Advanced Opportunity Search**.

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

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

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

5. The Opportunity Details screen is displayed. In the **Quotes** panel, select the check box adjacent to the quote you want to copy, and click **Copy as New**.

   Notes:

- The **Copy as New** button is displayed only if there is at least one quote associated with the opportunity.
- You can only copy one quote at a time.

6. The Create Quote screen is displayed. In the **Name*** box, enter a name for the quote.

7. 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.

8. In the **Customer** panel, perform the following steps:

   a. Select the **Existing Customer*** radio button.

   b. Click 🔍 adjacent to the **Existing Customer** radio button to search for the customer.

   c. The Customer Search dialog box is displayed. Depending on the **Customer Type** you want to search for, select either the **Business** radio button or the **Consumer** radio button.

   d. Enter the other search criteria and click **Search**.

   e. The list of customers matching the search criteria is displayed in the **Search Results** panel. Select the check box adjacent to the relevant 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 box adjacent to the **Existing Customer** radio button.

9. Click **Save** to create the new quote.

   Note: * indicates that the field is mandatory.

Create a Copy of a Quote from the Quote Summary Screen

To create a copy of a quote from the Quote Summary screen:

1. Log in to Sterling Field Sales.
2. The application home page is displayed. Perform one of the following tasks:
   - Click the **Find Quote** hyperlink.
   - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.
   - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.
   - Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

- Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

  Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

  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. Under the **Tasks** panel, click **Copy as New Quote**.

6. The Create Quote screen is displayed. In the **Name*** box, enter a name for the quote.

7. 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.

8. In the **Customer** panel, perform the following steps:

   a. Select the **Existing Customer*** radio button.

   b. Click 🔍 adjacent to the **Existing Customer** radio button to search for the customer.

   c. The Customer Search dialog box is displayed. Depending on the **Customer Type** you want to search for, select either the **Business** radio button or the **Consumer** radio button.

   d. Enter the other search criteria and click **Search**.

   e. The list of customers matching the search criteria is displayed in the **Search Results** panel. Select the check box adjacent to the relevant 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 box adjacent to the **Existing Customer** radio button.

9. Click **Save** to create the new quote.

   Note: * indicates that the field is mandatory.

Create a Quote and an Opportunity for a New Business Customer Using an Existing Quote

You can copy a quote and create a new quote and a new opportunity for a new business customer. For example, you may want to copy an existing quote to create a new quote for a new business customer. In such a scenario, you can copy the quote along with the product information, and payment and shipment terms, and then define the customer information to create a new quote and opportunity for a new customer.

You can create a quote and an opportunity for a new business customer using an existing quote from either the Opportunity Details screen or the Quote Summary screen.

Create a Copy of a Quote from the Opportunity Details Screen

To create a copy of a quote from the Opportunity Details screen:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

    ▫ Click the **Find Opportunity** hyperlink.

    ▫ Click the **Opportunities** tab. In the Opportunity home page, click the **Find Opportunity** hyperlink.

    ▫ Click the **Quotes** tab. In the Quote home page, click the **Find Opportunity** hyperlink.

    ▫ Navigate to the Quote Summary screen or the Quote Details screen, and then click the Opportunity Name hyperlink. In this scenario, ignore steps 3 and 4.

    ▫ Under the **Navigation** panel, click **Search...**, enter the name of the opportunity as the search criteria, and then click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

      Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

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

      However, if the opportunity that you are searching for is not displayed in the **Matches on Opportunities** panel, click **Advanced Opportunity Search**.

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

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

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

5. The Opportunity Details screen is displayed. In the **Quotes** panel, select the check box adjacent to the quote you want to copy, and click **Copy as New**.

    Notes:

- The **Copy as New** button is displayed only if there is at least one quote associated with the opportunity.

- You can only copy one quote at a time.

6. The Create Quote screen is displayed. In the **Name*** box, enter a name for the quote.

7. 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.

8. In the **Customer** panel, select the **New Customer** radio button, and then select the **Business** radio button. Enter the following information, as appropriate:

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

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

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

   - From the **Title** drop-down list, select the title for the contact, for example, Mrs, Dr, and so on.

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

     Note: The format for the phone number is based on your locale.

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

   - In the **Company*** box, enter the name of the company.

   - From the **Default Currency** drop-down list, select the currency to be used. By default, the currency that is defined for the enterprise is populated.

   - In the **Web URL** box, enter the URL that will be used to access the customer's Web site, for example, http://www.sterlingcommerce.com.

   - In the **Address** boxes, enter the sold to address information pertaining to the contact.

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

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

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

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

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

   - Select either of the following radio buttons:

     - Commercial: Select this if the address is the commercial address of the contact.

     - Residential: Select this if the address is the residential address of the contact.

9. Click **Save** to create the new quote.

   Note: * indicates that the field is mandatory.

Create a Copy of a Quote from the Quote Summary Screen

To create a copy of a quote from the Quote Summary screen:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   - Click the **Find Quote** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   - Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   - Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

     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. Under the **Tasks** panel, click **Copy as New Quote**.

6. The Create Quote screen is displayed. In the **Name*** box, enter a name for the quote.

7. 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.

8. In the **Customer** panel, select the **New Customer** radio button, and then select the **Business** radio button. Enter the following information, as appropriate:

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

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

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

   - From the **Title** drop-down list, select the title for the contact, for example, Mrs, Dr, and so on.

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

     Note: The format for the phone number is based on your locale.

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

- In the **Company*** box, enter the name of the company.

- From the **Default Currency** drop-down list, select the currency to be used. By default, the currency that is defined for the enterprise is populated.

- In the **Web URL** box, enter the URL that will be used to access the customer's Web site, for example, http://www.sterlingcommerce.com.

- In the **Address** boxes, enter the sold to address information pertaining to the contact.

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

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

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

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

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

- Select either of the following radio buttons:

  - Commercial: Select this if the address is the commercial address of the contact.

  - **Residential**: Select this if the address is the residential address of the contact.

9. Click **Save** to create the new quote.

   Note: * indicates that the field is mandatory.

Create a Quote and an Opportunity for a New Consumer Customer Using an Existing Quote

You can copy a quote from an existing opportunity and create a new quote and a new opportunity for a new consumer customer. For example, you may want to copy an existing quote to create a new quote for a new consumer customer. In such a scenario, you can copy the quote along with the product information, and payment and shipment terms, and then define the customer information to create a new quote and opportunity for the new customer.

You can create a quote and an opportunity for a new consumer customer using an existing quote from either the Opportunity Details screen or the Quote Summary screen.

Create a Copy of a Quote from the Opportunity Details Screen

To create a copy of a quote from the Opportunity Details screen:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

    ᴸ Click the **Find Opportunity** hyperlink.

    ᴸ Click the **Opportunities** tab. In the Opportunity home page, click the **Find Opportunity** hyperlink.

    ᴸ Click the **Quotes** tab. In the Quote home page, click the **Find Opportunity** hyperlink.

    ᴸ Navigate to the Quote Summary screen or the Quote Details screen, and then click the Opportunity Name hyperlink. In this scenario, ignore steps 3 and 4.

    ᴸ Under the **Navigation** panel, click **Search...**, enter the name of the opportunity as the search criteria, and then click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

    Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

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

    However, if the opportunity that you are searching for is not displayed in the **Matches on Opportunities** panel, click **Advanced Opportunity Search**.

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

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

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

5. The Opportunity Details screen is displayed. In the **Quotes** panel, select the check box adjacent to the quote you want to copy, and click **Copy as New**.

   Notes:

   ⫶ The **Copy as New** button is displayed only if there is at least one quote associated with the opportunity.

   ⫶ You can only copy one quote at a time.

6. The Create Quote screen is displayed. In the **Name*** box, enter a name for the quote.

7. 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.

8. In the **Customer** panel, select the **New Customer** radio button, and then select the **Consumer** radio button. Enter the following information, as appropriate:

   ⫶ 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 for the customer, for example, Mrs, Dr, and so on.

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

   Note: The format for the phone number is based on your locale.

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

   ⫶ In the **Company*** box, enter the name of the company.

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

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

   ⫶ Select either of the following radio buttons:

   - Commercial: Select this if the address is the commercial address of the customer.

   - Residential: Select this if the address is the residential address of the customer.

9. Click **Save** to create the new quote.

   Note: * indicates that the field is mandatory.

Create a Copy of a Quote from the Quote Summary Screen

To create a copy of a quote from the Quote Summary screen:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   - Click the **Find Quote** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   - Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   - Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

     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. Under the **Tasks** panel, click **Copy as New Quote**.

6. The Create Quote screen is displayed. In the **Name*** box, enter a name for the quote.

7. 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.

8. In the **Customer** panel, select the **New Customer** radio button, and then select the **Consumer** radio button. Enter the following information, as appropriate:

   - 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 for the customer, for example, Mrs, Dr, and so on.

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

     Note: The format for the phone number is based on your locale.

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

  Note: Based on the configuration, the **City** and **State** fields are automatically populated based on the country that you select and the postal code that you enter.
- Select either of the following radio buttons:

  - Commercial: Select this if the address is the commercial address of the customer.

  - **Residential**: Select this if the address is the residential address of the customer.
9. Click **Save** to create the new quote.

   Note: * indicates that the field is mandatory.

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 expiration date of the quote, the products added to the quote, and so on.

To search for a quote:

1. Log in to Sterling Field Sales.

2. In the application home page, perform one of the following tasks:

   □ Click the **Find Quote** hyperlink.

   □ Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   □ Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   □ Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

   Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

   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 search criteria, as appropriate:

   □ From the **Enterprise** drop-down list, select the enterprise for which the quote was created. This drop-down list displays all the enterprises that you have access to.

   Note: This field is displayed only if you have access to multiple enterprises.

   □ Select the **Show only incomplete quotes** check box to search only for the 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 🔍 adjacent to the **Customer ID** field to search for the customer for whom the quote was created. The Customer Search dialog box is displayed. Perform the following tasks:

  - From the **Enterprise** drop-down list, select the appropriate enterprise. This drop-down list displays all the enterprises to which you have access.

  - Depending on the **Customer Type** you want to search for, select either the **Business** radio button or the **Consumer** radio button.

  - Enter the other search criteria as appropriate and click **Search**.

  The 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 click 📅 to select the appropriate date. 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. Click **Search**.

   - If only one quote matches the search criteria, the Quote Summary screen is displayed.

   - If multiple quotes match the search criteria, the list of quotes is displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink or double-click the corresponding row. The Quote Summary screen is displayed.

Save a Quote Search

You can save a quote search to avoid entering the corresponding search criteria every time you search for quotes. For example, while performing a search for the quotes created for a particular customer, you can save the search so that you do not have to enter the same search criteria every time you want to search for quotes created for that customer.

To save a quote search:

1. Log in to Sterling Field Sales.

2. In the application home page, perform one of the following tasks:

    - Click the **Find Quote** hyperlink.

    - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

    - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

    - Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

      Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

      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 search criteria, as appropriate:

    - From the **Enterprise** drop-down list, select the enterprise for which the quote was created. This drop-down list displays all the enterprises that you have access to.

      Note: This field is displayed only if you have access to multiple enterprises.

    - Select the **Show only incomplete quotes** check box to search only for the 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 🔍 adjacent to the **Customer ID** field to search for the customer for whom the quote was created. The Customer Search dialog box is displayed. Perform the following tasks:

  - From the **Enterprise** drop-down list, select the appropriate enterprise. This drop-down list displays all the enterprises to which you have access.

  - Depending on the **Customer Type** you want to search for, select either the **Business** radio button or the **Consumer** radio button.

  - Enter the other search criteria as appropriate and click **Search**.

  The 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 click 📅 to select the appropriate date. 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. Click **Create Saved Search**.

5. The Saved Search dialog box is displayed. Perform the following steps:

   a. In the **Saved Search Name*** box, enter a name for the search that is to be saved.

   b. Click **Save**.

   Note: * indicates that the field is mandatory.

   The saved search is created and the Saved Search dialog box is closed.

Perform Quick Search

You can perform a quick search for an opportunity or a quote using the **Navigation** panel.

Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

To perform a quick search:

1. Log in to Sterling Field Sales.

2. Under the **Navigation** panel, click **Search...**, enter the name of the opportunity or the quote as the search criteria, and then click 🔍.

3. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria. Perform one of the following steps:

   - If the opportunity that you are searching for is displayed in the **Matches on Opportunities** panel, click the corresponding Opportunity Name hyperlink or double-click the corresponding row. The Opportunity Details screen is displayed.

   - If the opportunity that you are searching for is not displayed in the **Matches on Opportunities** panel, click **Advanced Opportunity Search**. The Opportunity Search screen is displayed. Enter the appropriate search criteria and click **Search**. If only one opportunity matches the search criteria, the Opportunity Details screen is displayed. If multiple opportunities match the search criteria, the list of opportunities is displayed in the **Search Results** panel. Click the corresponding Opportunity Name hyperlink. Alternatively, double-click the corresponding row. The Opportunity Details screen is displayed.

   - 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.

   - If the quote that you are searching for is not displayed in the **Matches on Quotes** panel, click **Advanced Quote Search**. The Quote Search screen is displayed. Enter the appropriate search criteria and click **Search**. If only one quote matches the search criteria, the Quote Summary screen is displayed. If multiple quotes match the search criteria, the list of quotes is displayed in the **Search Results** panel. Click the corresponding Quote Name hyperlink. Alternatively, double-click the corresponding row. The Quote Summary screen is displayed.

Modify Quote Details

You can modify the details of a quote. For example, you can modify the customer information in a quote by assigning a new contact to the customer, add or delete products from the quote, choose a different payment term, and so on.

Note: If a quote is pending approval or has already been presented to a customer, you may need to rework the quote to perform any modifications.

You can perform the following tasks to modify a quote:

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

To modify the details of a quote:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

    - Click the **Find Quote** hyperlink.

    - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

    - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

    - Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

    - Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

      Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

      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. Under the **Tasks** panel, click **Modify Quote**.

   The Quote Details screen is displayed.

The following table describes the fields displayed in the Quote Details screen:

Field	Description
<Customer information or customer contact information, including name, phone number, and e-mail address>	The details of the consumer customer or the business customer contact are displayed, including the name, phone number, and e-mail address.
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.
Quote ID	The unique identifier of the quote.
Opportunity Name	The name of the opportunity with which the quote is associated.

Modify Customer Details

You can modify the details pertaining to a customer by clicking the **Customer** tab in the Quote Details screen. The following table describes the fields displayed under the **Customer** tab:

Field	Description
Primary Information Panel	
Name	The name of the quote.
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] 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>*"

Field	Description
Contact Panel	
<Name of the consumer customer or the company>	The name of the customer in the case of a consumer customer or the name of the company in the case of a business customer.
Contact	The name of the business customer contact. **Note:** This field is displayed only if the customer is a business customer.
Phone No	The phone number of the business customer contact or the consumer customer.
E-mail Address	The e-mail address of the business customer contact or the consumer customer.'
Address	The sold to address of the customer.
Shipping Address Panel	
This panel displays the Ship To address of the customer.	
Billing Address Panel	
This panel displays the Bill To address of the customer.	

You can perform the following tasks:

- Modify Quote Name and Expiration Date
- Modify the Consumer Customer Details in a Quote
- Modify the Business Customer Details in a Quote

Modify Product Details

You can modify the details of the products in the quote by clicking the **Products** tab in the Quote Details screen.

The **Products** tab displays information about the products added to the quote, such as the identifier of the product, quantity, unit price, adjustment, line total, and so on. The total number of lines on a page is displayed at the bottom of that 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 in the quote. You can sort the lines by the **Line #**, **Product**, 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 then select **Sort Ascending**.

Note: When you sort the lines, the sorting takes place on the server side. Therefore, when you sort the lines, all the products that are added to the quote 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.

The following table describes the fields displayed under the **Products** tab:

Field	Description
Pricing Date	The pricing date of the quote. The prices of the products in the quote are calculated based on this date.
Adjustments	The adjustments applied to the quote. To view the adjustment breakdown for the quote, click the adjustments value hyperlink. The Price Breakdown dialog box displays the profit margin, manual adjustments, and the automatic adjustments applied to the quote.
Total	The quote total.
Line #	The line number.
Image	The image of the product.
Product	The identifier of the product is displayed as a hyperlink. Clicking this hyperlink will display the Product Details screen. ◆ Use ▦ to manage the notes for a product. ◆ Use ▦ to adjust the component pricing of a bundle product. ◆ Use 🔧 to configure a product. ◆ Use 🔧 to reconfigure a product.
Quantity	The quantity of the product is displayed along with the product's unit of measure (UOM).
Unit Price	The unit price of the product.
Adjustment	The adjustments applied to the line. To view the adjustment breakdown for a line, click the adjustment value hyperlink. The Price Breakdown dialog box displays the profit margin, manual adjustments, and the automatic adjustments applied to the line.
Line Total	The line total. This is the total price for the line that is calculated after taking into consideration the unit price, quantity, and the adjustments applied to the line.

You can perform the following tasks:

- Add a Product to a Quote
- Adjust the Price of a Product in a Quote
- Adjust the Price of Multiple Products in a Quote
- Adjust the Quote Price
- Move a Product to the Recommended Lines in a Quote
- View the Quote Price for a Different Pricing Date
- Modify a Product's Quantity in a Quote
- View the Notes Added to a Product in a Quote
- Add a Note to a Product in a Quote
- Add a Related Product of a Product to a Quote
- Add a Related Product of a Product as a Recommended Product
- Adjust the Price of a Bundle Component in a Quote

- Add a Product to a Quote
- Adjust the Price of Multiple Bundle Components in a Quote
- Add a Note to a Bundle Component in a Quote
- Delete a Product from a Quote
- Adjust the Price of a Product in a Quote
- View the Notes Added to a Bundle Component in a Quote
- Configure or Reconfigure a Product in a Quote

Modify the Payment Terms and Shipment Terms

You can modify the payment terms and shipment terms in a quote by clicking the **Terms** tab in the Quote Details screen. The following table describes the fields displayed under the **Terms** tab:

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.
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.

You can modify the payment terms and shipment terms for a quote. For more information about modifying the payment terms and shipment terms, refer to the topic "Define the Payment Terms and Shipment Terms for a Quote".

Modify Quote Name and Expiration Date

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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

    ι Click the **Find Quote** hyperlink.

    ι Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

    ι Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

    ι Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

    ι Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

      Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

      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 Under the **Tasks** panel, click **Modify Quote**. The Quote Details screen is displayed. Click the **Customer** tab.

    ι Click the **Edit** hyperlink in the **Customer** panel. The Quote Details screen is displayed, with the **Customer** tab highlighted.

6. In the **Primary Information** panel under the **Customer** tab, perform the following tasks:

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

    ι 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 computed based on the configuration.

7. Click **Save**.

   Note: * indicates that the field is mandatory.

Modify the Consumer Customer Details in a Quote

After a quote is created for a consumer customer, you can modify the customer information in the quote. For example, you can modify the Ship To address of the customer in the quote.

Note: Even if you modify the address of the customer for a quote, the address does not get updated on the opportunity with which the quote is associated.

You can perform the following tasks as part of consumer customer details modification process:

- Modify the Details of a Consumer Customer
- Modify the Ship To Address of a Consumer Customer
- Modify the Bill To Address of a Consumer Customer

Modify the Details of a Consumer Customer

You can modify the details of a consumer customer for a quote. For example, you can modify the phone number or the e-mail address of a consumer customer.

To modify the details of a consumer customer:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   - Click the **Find Quote** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   - Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   - Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

     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:

   · Under the **Tasks** panel, click **Modify Quote**. The Quote Details screen is displayed. Click the **Customer** tab.

   · Click the **Edit** hyperlink in the **Customer** panel. The Quote Details screen is displayed, with the **Customer** tab highlighted.

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

7. The Edit Contact dialog box is displayed. Modify the following fields, as appropriate:

   · 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.

8. Click **Save**.

9. The Edit Contact dialog box is closed and the Quote Details screen is displayed. Click **Save** in the Quote Details screen.

Modify the Ship To Address of a Consumer Customer

You can modify the Ship To address of a consumer customer for 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.

To modify the Ship To address of a consumer customer:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   · Click the **Find Quote** hyperlink.

   · Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   · Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   · Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   · Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

     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:

   ‣ Under the **Tasks** panel, click **Modify Quote**. The Quote Details screen is displayed. Click the **Customer** tab.

   ‣ Click the **Edit** hyperlink in the **Customer** panel. The Quote Details screen is displayed, with the **Customer** tab highlighted.

6. In the **Shipping Address** panel under the **Customer** tab, click the **Edit** hyperlink.

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

   ‣ To choose 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 for the customer, for example, Mrs, Dr, and so on.

   ‣ In the **Company** box, enter the name of the company.

   ‣ 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 that you select and the postal code that you enter.

   ‣ Select either of the following radio buttons:

   - Commercial: Select this if the address is the commercial address of the customer.

   - **Residential**: Select this if the address is the residential address of the customer.

   Note: * indicates that the field is mandatory.

8. Click **Save**.

9. If the address that you entered is not valid, the Select Address dialog box displays the valid addresses that are closest to the one that you entered. Select the appropriate option and click **Save**.

10. Click **Save** in the Quote Details screen.

Modify the Bill To Address of a Consumer Customer

You can modify the Bill To address of a consumer 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.

To modify the Bill To address of a consumer customer:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   ⊡ Click the **Find Quote** hyperlink.

   ⊡ Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   ⊡ Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   ⊡ Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   ⊡ Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

   Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

   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:

   ⊡ Under the **Tasks** panel, click **Modify Quote**. The Quote Details screen is displayed. Click the **Customer** tab.

   ⊡ Click the **Edit** hyperlink in the **Customer** panel. The Quote Details screen is displayed, with the **Customer** tab highlighted.

6. In the **Billing Address** panel under the **Customer** tab, click the **Edit** hyperlink.

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

   ⊡ To choose 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 for the customer, for example, Mrs, Dr, and so on.

- In the **Company** box, enter the name of the company.

- 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 that you select and the postal code that you enter.

- Select either of the following radio buttons:

  - Commercial: Select this if the address is the commercial address of the customer.

  - **Residential**: Select this if the address is the residential address of the customer.

Note: * indicates that the field is mandatory.

8. Click **Save**.

9. If the address that you entered is not valid, the Select Address dialog box displays the valid addresses that are closest to the one that you entered. Select the appropriate option and click **Save**.

10. Click **Save** in the Quote Details screen.

Modify the Business Customer Details in a Quote

After a quote is created for a business customer, you can modify the customer information in the quote. For example, you can modify the Ship To address of the business customer's contact in the quote, or assign a new customer contact to the business customer.

Note: Even if you modify the address of the business customer's contact in a quote, the address does not get updated in the opportunity with which the quote is associated.

You can perform the following tasks as part of the business customer details modification process:

- Assign a Different Contact to a Business Customer
- Modify the Details of a Business Customer's Contact
- Modify the Ship To Address of a Business Customer's Contact
- Modify the Bill To Address of a Business Customer's Contact

Assign a Different Contact to a Business Customer

In a business-to-business scenario, a customer can have multiple contacts. You can assign a different contact to a business customer in a quote by either selecting a different contact from the list of existing contacts for the customer, or adding a new contact for the customer.

To assign a different contact to a business customer:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   - Click the **Find Quote** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   - Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   - Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

     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:

   - Under the **Tasks** panel, click **Modify Quote**. The Quote Details screen is displayed. Click the **Customer** tab.

   - Click the **Edit** hyperlink in the **Customer** panel. The Quote Details screen is displayed, with the **Customer** tab highlighted.

6. In the **Contact** panel under the **Customer** tab, perform either of the following tasks:

- To assign an existing contact to the customer, select the corresponding contact from the **Contact*** drop-down list.

- To assign a new contact to the customer, click the **New** hyperlink in the **Contact** panel. The Add New Contact dialog box is displayed. Enter the following information, as appropriate, and click **Save**:

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

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

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

  - From the **Title** drop-down list, select the title for the contact, for example, Mrs, Dr, and so on.

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

    Note: The format for the phone number is based on your locale.

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

  - In the **Company** box, enter the name of the company.

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

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

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

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

  - In the **State** field, enter or select the name of the state in which the contact 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 that you select and the postal code that you enter.

  - Select either of the following radio buttons:

    - Commercial: Select this if the address is the commercial address of the contact.

    - **Residential**: Select this if the address is the residential address of the contact.

  Note: * indicates that the field is mandatory.

7. Click **Save**.

8. If the address that you entered is not valid, the Select Address dialog box displays the valid addresses that are closest to the one that you entered. Select the appropriate option and click **Save**.

9. Click **Save** in the Quote Details screen.

Modify the Details of a Business Customer's Contact

You can modify the business customer contact's information in a quote. For example, you can modify the phone number or the e-mail address of a business customer's contact

To modify the details of a business customer's contact:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

    ⬦ Click the **Find Quote** hyperlink.

    ⬦ Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

    ⬦ Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

    ⬦ Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

    ⬦ Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

    Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

    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:

    ⬦ Under the **Tasks** panel, click **Modify Quote**. The Quote Details screen is displayed. Click the **Customer** tab.

    ⬦ Click the **Edit** hyperlink in the **Customer** panel. The Quote Details screen is displayed, with the **Customer** tab highlighted.

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

7. The Edit Contact dialog box is displayed. Modify the following fields, as appropriate:

- In the **Phone No*** box, enter the phone number of the contact.
- In the **E-mail Address*** box, enter the e-mail address of the contact.

8. Click **Save**.

9. The Edit Contact dialog box is closed and the Quote Details screen is displayed. Click **Save** in the Quote Details screen.

Modify the Ship To Address of a Business Customer's Contact

You can modify the Ship To address of a business customer's contact in a quote by either selecting a different address from the list of existing Ship To addresses defined for the customer, or adding a new Ship To address for the customer.

To modify the Ship To address of a business customer's contact:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:
   - Click the **Find Quote** hyperlink.
   - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.
   - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.
   - Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.
   - Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

     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:
   - Under the **Tasks** panel, click **Modify Quote**. The Quote Details screen is displayed. Click the **Customer** tab.
   - Click the **Edit** hyperlink in the **Customer** panel. The Quote Details screen is displayed, with the **Customer** tab highlighted.

6. In the **Shipping Address** panel under the **Customer** tab, click the **Edit** hyperlink.

7. The Edit Address dialog box is displayed. Modify the following information, as appropriate:

  - To choose 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 contact.

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

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

  - From the **Title** drop-down list, select the title for the contact, for example, Mrs, Dr, and so on.

  - In the **Company** box, enter the name of the company.

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

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

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

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

  - In the **State** field, enter or select the name of the state in which the contact 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 that you select and the postal code that you enter.

  - Select either of the following radio buttons:

    - Commercial: Select this if the address is the commercial address of the contact.

    - Residential: Select this if the address is the residential address of the contact.

  Note: * indicates that the field is mandatory.

8. Click **Save**.

9. If the address that you entered is not valid, the Select Address dialog box displays the valid addresses that are closest to the one that you entered. Select the appropriate option and click **Save**.

10. Click **Save** in the Quote Details screen.

Modify the Bill To Address of a Business Customer's Contact

You can modify the Bill To address of a business customer's contact for 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.

To modify the Bill To address of a business customer's contact:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

  - Click the **Find Quote** hyperlink.

  - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

- Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.
- Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.
- Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

  Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

  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:
   - Under the **Tasks** panel, click **Modify Quote**. The Quote Details screen is displayed. Click the **Customer** tab.
   - Click the **Edit** hyperlink in the **Customer** panel. The Quote Details screen is displayed, with the **Customer** tab highlighted.

6. In the **Billing Address** panel under the **Customer** tab, click the **Edit** hyperlink.

7. The Edit Address dialog box is displayed. Modify the following information, as appropriate:
   - To choose 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 contact.
   - In the **Last Name*** box, enter the last name of the contact.
   - In the **MI** box, enter the middle initial of the contact.
   - From the **Title** drop-down list, select the title for the contact, for example, Mrs, Dr, and so on.
   - In the **Company** box, enter the name of the company.
   - In the **Address** boxes, enter the address of the contact.
   - From the **Country*** drop-down list, select the country in which the contact resides.
   - In the **Postal Code** box, enter the postal code of the city in which the contact resides.
   - In the **City** box, enter the name of the city in which the contact resides.

٠ In the **State** field, enter or select the name of the state in which the contact 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 that you select and the postal code that you enter.

٠ Select either of the following radio buttons:

- Commercial: Select this if the address is the commercial address of the contact.

- **Residential**: Select this if the address is the residential address of the contact.

Note: * indicates that the field is mandatory.

8. Click **Save**.

9. If the address that you entered is not valid, the Select Address dialog box displays the valid addresses that are closest to the one that you entered. Select the appropriate option and click **Save**.

10. Click **Save** in the Quote Details screen.

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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

    · Click the **Find Quote** hyperlink.

    · Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

    · Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

    · Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

    · Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

      Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

      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.

   ⁃ Under the **Tasks** panel, click **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.

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. Log in to Sterling Field Sales.
2. The application home page is displayed. Perform one of the following tasks:
    - Click the **Find Quote** hyperlink.
    - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.
    - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.
    - Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.
    - Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

        Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

        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.

   ◦ Under the **Tasks** panel, click **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.

   The Quote Details screen is displayed.

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 topic "View Product Details and Check Availability".

To add a product to a quote:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   - Click the **Find Quote** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   - Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   - Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

     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:

  ○ Under the **Tasks** panel, click **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 a product as a quote line.

  ○ 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. Perform either of the following tasks:

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

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

  ○ 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**.

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

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 a quote line and a recommended line.

To adjust the price of a product in a quote:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   - Click the **Find Quote** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   - Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   - Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

     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:

   - Under the **Tasks** panel, click **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 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 the **Modify** hyperlink displayed under 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.

10. The Adjust Line Price dialog box displays 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 displayed in the list of pricing rules. In the box under the **Adjustment** column, enter the absolute adjustment or percentage adjustment to be applied under the pricing rule.

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

- To delete a pricing rule from the list of pricing rules, click ✖ adjacent to the corresponding pricing rule.

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

11. Click **Save**.

The Quote Details screen is displayed with the updated pricing adjustments.

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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

    ▪ Click the **Find Quote** hyperlink.

    ▪ Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

    ▪ Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

    ▪ Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

    ▪ Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

       Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

       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:

    ▪ Under the **Tasks** panel, click **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 multiple quote product lines.

- Click the **Recommended Lines** tab to adjust the price of multiple recommended product lines.

  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. Select the check boxes corresponding to the products for which you want to adjust the price. Click **Add Line Adjustment**.

10. 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**.

    The Add Line Adjustment dialog box is closed.

11. Click **Save**.

    The Quote Details screen is displayed with the updated pricing adjustments.

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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   ⌐ Click the **Find Quote** hyperlink.

   ⌐ Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   ⌐ Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   ⌐ Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   ⌐ Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

   Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

   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:

   ⌐ Under the **Tasks** panel, click **Modify Quote**.

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

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

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

   Note: If a manual pricing rule has not been applied to the quote, 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 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 displayed in the list of pricing rules. In the box under the **Adjustment** column, enter the absolute adjustment or percentage adjustment to be applied under the pricing rule.

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

   - To delete a pricing rule from the list of pricing rules, click ✖ adjacent to the corresponding pricing rule.

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

8. Click **Save**.

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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

    ˪ Click the **Find Quote** hyperlink.

    ˪ Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

    ˪ Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

    ˪ Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

    ˪ Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

    Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

    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:

    ˪ Under the **Tasks** panel, click **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. Click **More** and then 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 will be displayed or hidden based on the configuration.

10. Click **Save**.

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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   ⌐ Click the **Find Quote** hyperlink.

   ⌐ Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   ⌐ Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   ⌐ Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   ⌐ Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

   Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

   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:

   ⌐ Under the **Tasks** panel, click **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 will be 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.

   Select the check boxes adjacent to the products you want to move to the quote. Click **More** and then 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.

9. Click **Save**.

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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   ⌐ Click the **Find Quote** hyperlink.

   ⌐ Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   ⌐ Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   ⌐ Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   ⌐ Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

   Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

   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:

   ⌐ Under the **Tasks** panel, click **Modify Quote**.

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

6. The Quote Details screen is displayed, with the **Products** tab highlighted. Click 🔳 adjacent to the **Pricing Date** field and select a different pricing date. The initial pricing date of a quote is the date on which the quote is created.

7. Click **Save**.

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

Modify a Product's Quantity in a Quote

After adding a product to a quote, you can modify the quantity of the product. For example, you may want to either increase or decrease the quantity of the product based on the requirements of the customer.

To modify a product's quantity in a quote:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   ι   Click the **Find Quote** hyperlink.

   ι   Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   ι   Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   ι   Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   ι   Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

       Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

       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   Under the **Tasks** panel, click **Modify Quote**.

   ι   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:

   ι   Click the **Quote Lines** tab to modify the quantity of a quote product line.

   ι   Click the **Recommended Lines** tab to modify the quantity 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. In the box under the **Quantity** column, enter the appropriate quantity for the corresponding product.

10. Click **Save**.

    The Quote Details screen is refreshed, and the modified quantity is displayed along with the modified adjustments and quote total.

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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   - Click the **Find Quote** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   - Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   - Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

     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:

   - Under the **Tasks** panel, click **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. 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 box adjacent to the corresponding product, click **More**, and then click **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.

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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   ᴸ Click the **Find Quote** hyperlink.

   ᴸ Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   ᴸ Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   ᴸ Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   ᴸ Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

      Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

      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 Under the **Tasks** panel, click **Modify Quote**.

   ᴸ 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:

   ᴸ Click the **Quote Lines** tab to view the notes added to a quote product line.

   ᴸ Click the **Recommended Lines** tab to view the notes added to 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. Select the check box adjacent to the corresponding product, click **More,** and then 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:

    - 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.

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

    The Quote Details screen is displayed.

Add a Related Product of a 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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   - Click the **Find Quote** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   - Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   - Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

     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:

   - Under the **Tasks** panel, click **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.

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 box adjacent to the corresponding product whose related product you want to add to the quote, click **More**, and then click **View Related Products**.

10. The Related Products dialog box, containing the list of related products associated with the product, is displayed. Select the check box adjacent to the corresponding product and click **Add As Quote Line**.

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

12. Click **Save** in the Quote Details screen.

Add a Related Product of a 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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   ⌐ Click the **Find Quote** hyperlink.

   ⌐ Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   ⌐ Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   ⌐ Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   ⌐ Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

   Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

   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:

   ⌐ Under the **Tasks** panel, click **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. 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 box adjacent to the corresponding product whose related product you want to add as a recommended product, click **More**, and then click **View Related Products**.

10. The Related Products dialog box, containing the list of related products associated with the product, is displayed. Select the check box adjacent to the corresponding product and click **Add As Recommended Line**.

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

12. Click **Save** in the Quote Details screen.

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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

    ⌐ Click the **Find Quote** hyperlink.

    ⌐ Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

    ⌐ Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

    ⌐ Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

    ⌐ Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

    Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

    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:

    ⌐ Under the **Tasks** panel, click **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 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 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 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] 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 displayed in the list of pricing rules. In the box under the **Adjustment** column, enter the absolute adjustment or percentage adjustment to be applied under the pricing rule.

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

    - To delete a pricing rule from the list of pricing rules, click [icon] adjacent to the corresponding pricing rule.

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

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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   ᴸ Click the **Find Quote** hyperlink.

   ᴸ Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   ᴸ Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   ᴸ Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   ᴸ Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

   Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

   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 Under the **Tasks** panel, click **Modify Quote**.

   ᴸ 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:

   ᴸ Click the **Quote Lines** tab to adjust the price of the bundle components of a quote product line.

   ᴸ Click the **Recommended Lines** tab to adjust the price of 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 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 displayed in the list of pricing rules. In the box under the **Adjustment** column, enter the absolute adjustment or percentage adjustment to be applied under the pricing rule.

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

- To delete a pricing rule from the list of pricing rules, click adjacent to the corresponding pricing rule.

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

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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   - Click the **Find Quote** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   - Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   - Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

     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:

   - Under the **Tasks** panel, click **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 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.

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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, click **More,** and then click **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 tasks:

    - 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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

    * Click the **Find Quote** hyperlink.

    * Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

    * Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

    * Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

    * Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

       Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

       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:

    * Under the **Tasks** panel, click **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 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, click **More,** and then click **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.

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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   ι Click the **Find Quote** hyperlink.

   ι Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   ι Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   ι Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   ι Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

   Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

   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 Under the **Tasks** panel, click **Modify Quote**.

   ι 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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   ▫ Click the **Find Quote** hyperlink.

   ▫ Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   ▫ Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   ▫ Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   ▫ Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

   Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

   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:

   ▫ Under the **Tasks** panel, click **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. Click **More** and then click **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.

Define the Payment Terms and Shipment Terms for a Quote

After a quote is created, you can define the payment terms 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 terms and shipment terms for a quote:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   - Click the **Find Quote** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   - Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   - Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

     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:

   - Under the **Tasks** panel, click **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. 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.

- Click adjacent to the **Requested Delivery Date** field to select 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.

- 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**.

View Quote Summary

You can search for a quote and view the quote details.

You can 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. Log in to Sterling Field Sales.
2. The application home page is displayed. Perform one of the following tasks:

    - Click the **Find Quote** hyperlink.
    - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.
    - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.
    - Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.
    - Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

        Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

        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 consumer customer or the business customer contact are displayed, including the name, phone number, and e-mail address.
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.
Anticipated Close Date	The date on which the quote is closed. This is the date by which the opportunity, which the quote is associated with, is expected to be closed.
Owner ID	The identifier of the owner of the opportunity with which the quote is associated.
Co-Owner ID	The identifier of the co-owner of the opportunity with which the quote is associated. A co-owner is the secondary owner of an opportunity.

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 business customer contact or the consumer customer for which the quote has been created.
  - Shipping Address: The ship to address of the business customer contact or the consumer customer for which the quote has been created.

  Additionally, 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:
  - Sub Total: The quote's subtotal.
  - Adjustments: The adjustments applied to the quote.
  - Shipping Costs: 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.

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 will be 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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   * Click the **Find Quote** hyperlink.

   * Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   * Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   * Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

- Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

  Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

  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. Under the **Tasks** panel, click **Request Approval**.

   - 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.

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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

    ᴸ Click the **Find Quote** hyperlink.

    ᴸ Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

    ᴸ Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

    ᴸ Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

    ᴸ Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

       Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

       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. Under the **Tasks** panel, click **View Approvals**.

The Approvals screen is displayed.

The following table describes the fields displayed in the Approvals screen:

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

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:

  ▫ Sub Total: The quote's subtotal.

  ▫ Adjustments: The price adjustments applied to the quote.

  ▫ Shipping Costs: 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.

You can perform the following tasks from the Approvals screen:

- View the Details of a Line Violating a Manual Pricing Rule
- Accept an Approval Request for a Quote
- Reject an Approval Request for a Quote
- Add a Note to a Quote
- View the Notes Added to a Quote
- Modify Opportunity Details

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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   - Click the **Find Quote** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   - Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   - Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

     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. Under the **Tasks** panel, click **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.

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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   - Click the **Find Quote** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   - Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   - Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

     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. Under the **Tasks** panel, click **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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

    - Click the **Find Quote** hyperlink.

    - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

    - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

    - Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

    - Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

        Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

        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. Under the **Tasks** panel, click **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.

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 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. Log in to Sterling Field Sales.
2. The application home page is displayed. Perform one of the following tasks:
    - Click the **Find Quote** hyperlink.
    - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.
    - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.
    - Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.
    - Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

      Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

      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. Under the **Tasks** panel, click **View Alternative Quotes**.
6. The View Alternative Quotes screen displays the list of alternative quotes available for the 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.

Additionally, you can perform the following tasks in the View Alternative Quotes screen:

- Add a Note to a Quote

- View the Notes Added to a Quote
- Modify Opportunity Details

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 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. Log in to Sterling Field Sales.
2. The application home page is displayed. Perform one of the following tasks:
   - Click the **Find Quote** hyperlink.
   - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.
   - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.
   - Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.
   - Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

     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. Under the **Tasks** panel, click **Generate Proposal**. Alternatively, if the quote is in the **Approved** status, perform the following steps:
   a. Under the **Tasks** panel, click **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:
   - From the **Choose a print template*** drop-down list, select the template to be used for generating the proposal.
   - From the **Choose a print format*** drop-down list, select the format in which the proposal is to be printed.
   - In the **Proposal Title*** box, enter a title for the proposal.

- 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.

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

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

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

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

- 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.

Additionally, you can perform the following tasks in the Generate Proposal screen:

- Add a Note to a Quote
- View the Notes Added to a Quote
- Modify Opportunity Details

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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   - Click the **Find Quote** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   - Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   - Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

     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. Under the **Tasks** panel, click **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.

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.

Additionally, you can perform the following tasks in the Send To Customer screen:

- [Generate a Proposal](#)

- Add a Note to a Quote
- View the Notes Added to a Quote
- Modify Opportunity Details

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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   ⬩ Click the **Find Quote** hyperlink.

   ⬩ Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   ⬩ Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   ⬩ Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   ⬩ Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

   Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

   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. Under the **Tasks** panel, click **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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   - Click the **Find Quote** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   - Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   - Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

     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. Under the **Tasks** panel, click **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 work on 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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   - Click the **Find Quote** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   - Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   - Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

     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. Under the **Tasks** panel, click **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 quote 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 quote 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 in the **Awaiting 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:

    * 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.

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.

Additionally, you can perform the following tasks in the Convert to Order screen:

* View the Notes Added to a Quote
* Modify Opportunity Details

Abandon a Quote

If you feel that a quote no longer serves a purpose, you can abandon the quote. For example, if you create a quote by mistake, you can abandon the quote.

Note: After a quote has been abandoned, you cannot perform any modifications to the quote.

To abandon a quote:

1. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

   - Click the **Find Quote** hyperlink.

   - Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

   - Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

   - Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

   - Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍 . The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

     Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

     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. Under the **Tasks** panel, click **Abandon Quote**.

6. The Abandon Quote screen is displayed. Perform the following tasks:

   - From the **Abandon Reason*** drop-down list, select the reason code you want to use. The reason code is used to determine the reason why you want to abandon the quote. For example, you can select the **Duplicate** reason code if the quote has been duplicated by mistake.

   - 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**.

Additionally, you can perform the following tasks in the Abandon Quote screen:

- Add a Note to a Quote
- View the Notes Added to a Quote
- Modify Opportunity Details

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. Log in to Sterling Field Sales.

2. The application home page is displayed. Perform one of the following tasks:

    ۰   Click the **Find Quote** hyperlink.

    ۰   Click the **Opportunities** tab. In the Opportunity home page, click the **Find Quote** hyperlink.

    ۰   Click the **Quotes** tab. In the Quote home page, click the **Find Quote** hyperlink.

    ۰   Navigate to the Opportunity Details screen, and then click the Quote Name hyperlink in the **Quotes** panel. In this scenario, ignore steps 3 and 4.

    ۰   Under the **Navigation** panel, click **Search...**, enter the name of the quote as the search criteria, and then click 🔍. The Quick Search Results screen displays a maximum of 10 quotes and 10 opportunities matching the search criteria.

        Note: The **Navigation** panel is displayed only if you have not selected the **Hide Navigation Panel** user preference.

        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. Under the **Tasks** panel, click **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**.

Additionally, you can perform the following tasks in the Rework Quote screen:

-   Add a Note to a Quote
-   View the Notes Added to a Quote
-   Modify Opportunity Details

Log Out of the Sterling Field Sales Application

Log out of the application when you want to end your current session.

To log out of the application, click **Sign Out** in the application header bar. You will be logged out and the application will close.

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