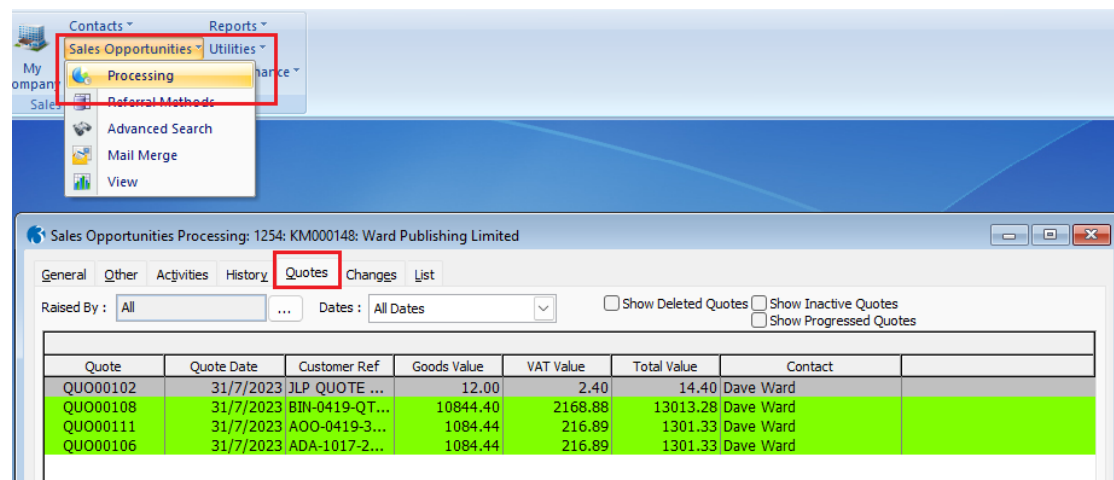


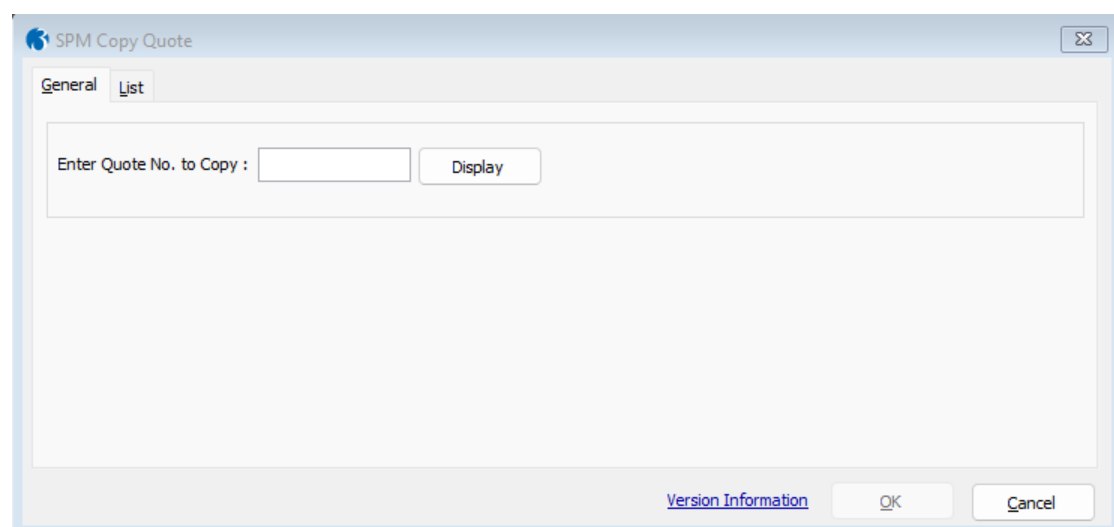
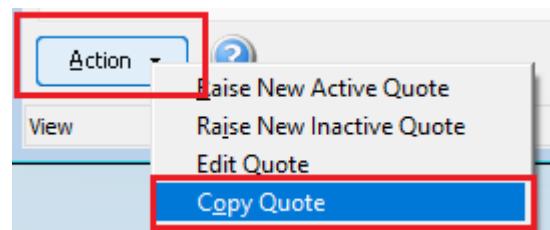
SPM Copy Quote Utility

This utility allows for an existing **CRM Quote** to be copied from one company / contact to another company / contact. This option applies to CRM Quotes and not SOP Quotes.

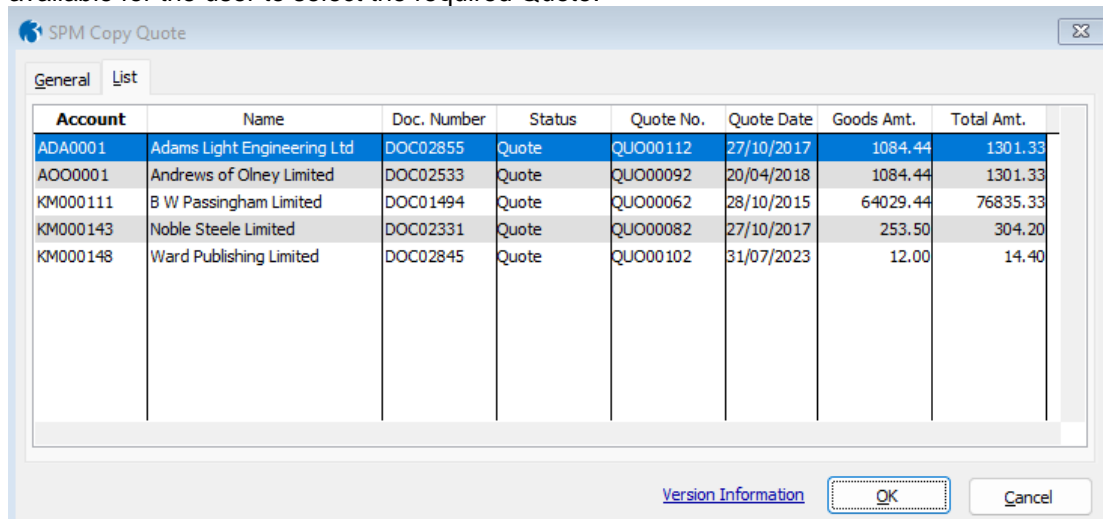
First, the user should select the **Quote** Tab in CRM - Sales Opportunities - Processing of the company / contact the existing quote should be copied to:



Next, the user should select the Action Menu – Copy Quote option:



Next, the user should enter the Quote number of the Quote to be copied. If the system detects a partial match on the number entered, each matching record will be displayed, available for the user to select the required Quote.



The dialog box titled "SPM Copy Quote" contains a "General" tab and a "List" tab. The "List" tab is active, displaying a table with the following data:

Account	Name	Doc. Number	Status	Quote No.	Quote Date	Goods Amt.	Total Amt.
ADA0001	Adams Light Engineering Ltd	DOC02855	Quote	QUO00112	27/10/2017	1084.44	1301.33
AOO0001	Andrews of Olney Limited	DOC02533	Quote	QUO00092	20/04/2018	1084.44	1301.33
KM000111	B W Passingham Limited	DOC01494	Quote	QUO00062	28/10/2015	64029.44	76835.33
KM000143	Noble Steele Limited	DOC02331	Quote	QUO00082	27/10/2017	253.50	304.20
KM000148	Ward Publishing Limited	DOC02845	Quote	QUO00102	31/07/2023	12.00	14.40

At the bottom of the dialog box, there is a "Version Information" link, an "OK" button, and a "Cancel" button.

Selecting the provided Ok button will prompt the user to copy the selected Quote. Only when the user selects Yes to this prompt will the quote be copied. The user can halt the process by selecting the Cancel option, which will result in no Quote being copied.

SPM Copy Quote Utility - £500.00

Annual Maintenance and Support - £100.00