QRG QT.1 – New Quote

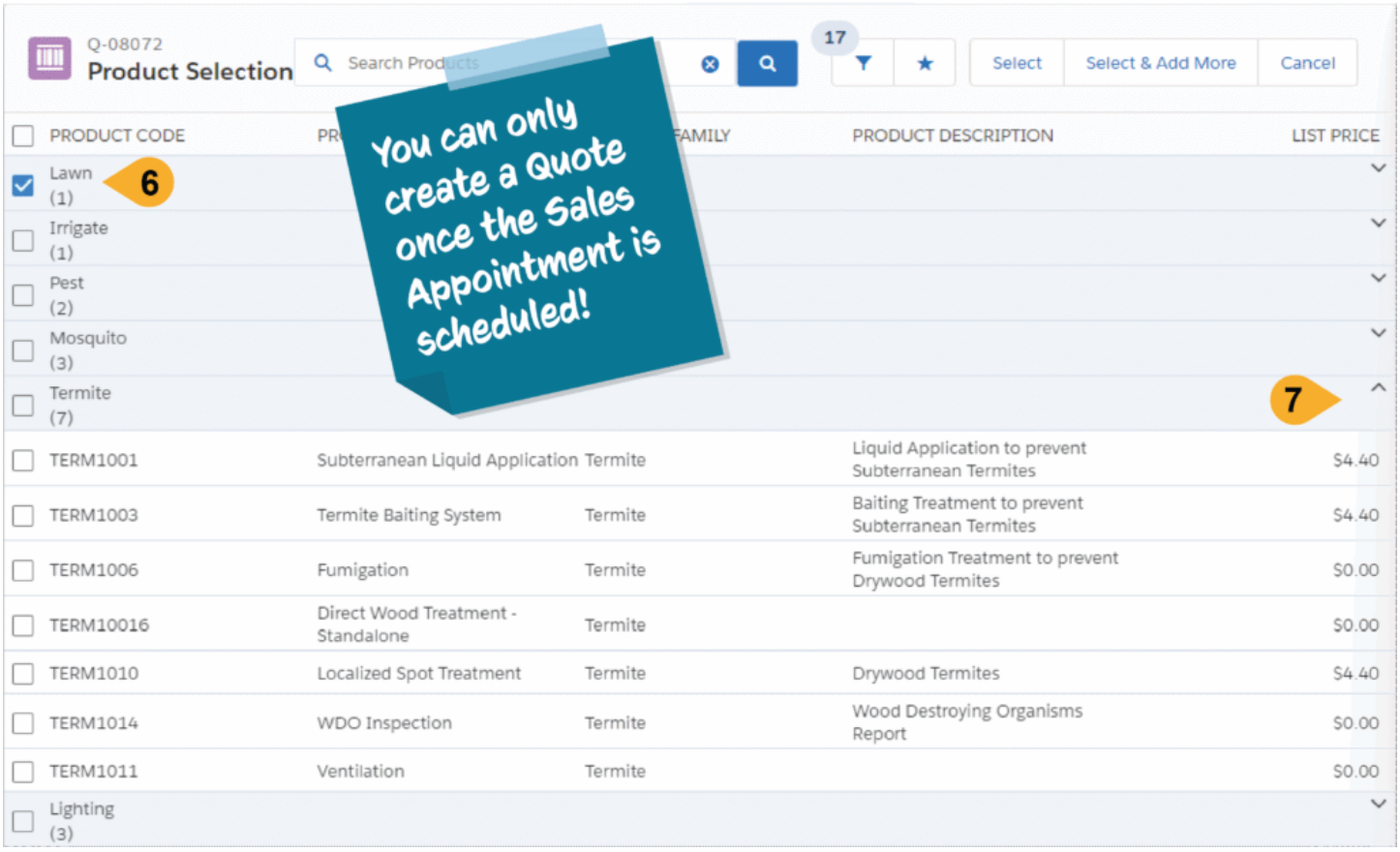
Quick Reference Guides · https://milo.masseyservices.com/docs/qrg-qt-1-new-quote/

Creating a Quote

1. Open the relevant Opportunity and click New Quote in the Quick Action ribbon.
2. Select the Default Service Location in the New Quote window, then click Save.
3. Scroll down and open the Quote created by Salesforce.

Adding Services to a Quote

4. In a Quote, click on Edit Lines.
5. Click Add Products.
6. Select the services using the check boxes.
7. Use the down arrows to expand a category to choose a specific service.
8. Click Select to save



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