

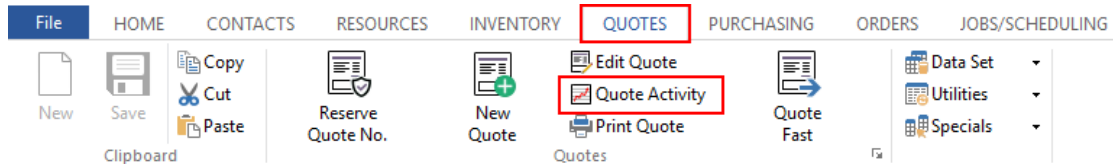
Quote Activity

Overview:

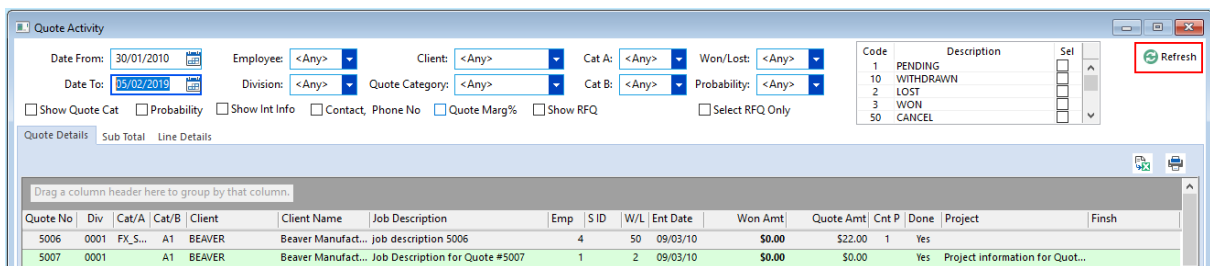
The Quote Activity function within OPTO enables the user to track quote activity and performance in real time. The report information can be refined by selecting any of the range of options to increase the degree of details provided in the report.

To View the Quote Activity

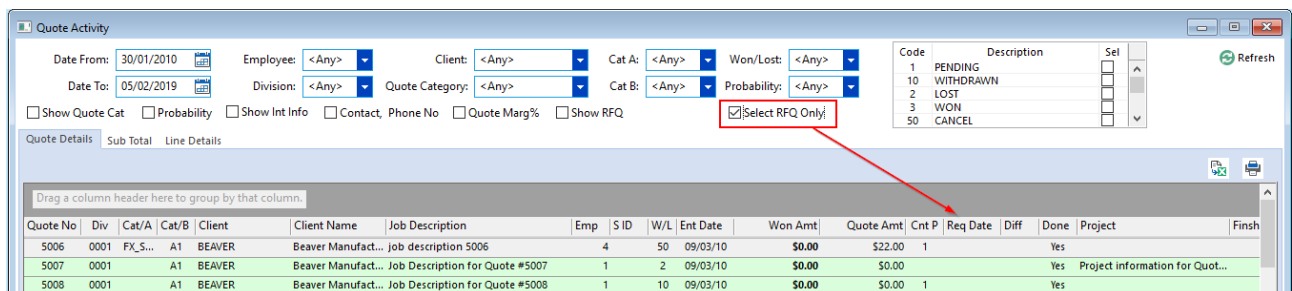
From the OPTO ribbon, select the 'Quotes' tab and **click** on the 'Quote Activity' icon (circled below) to open the 'Quote Activity' window.



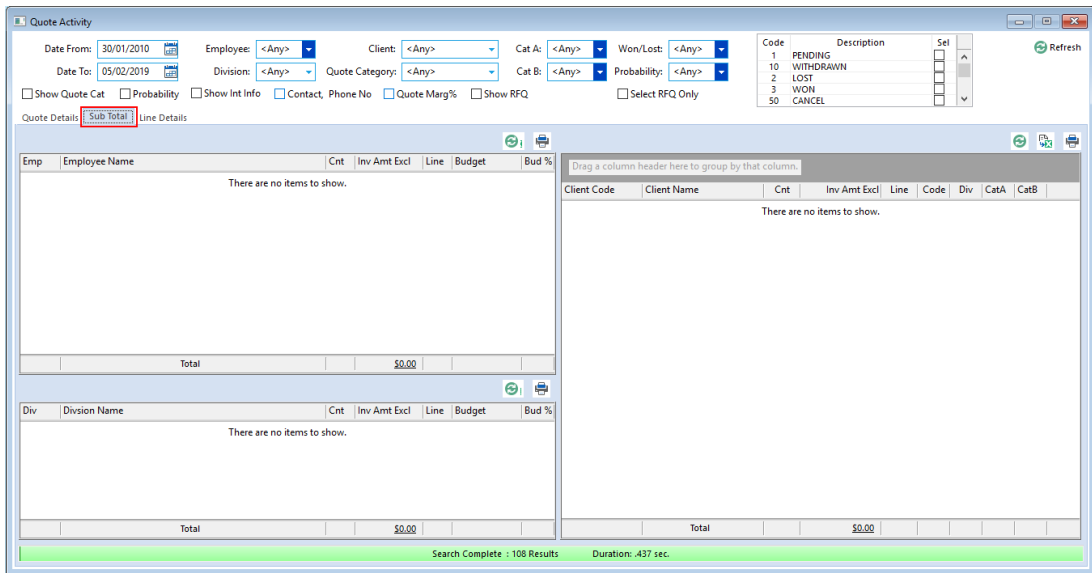
Enter the required dates in the **Date From** and **Date To** fields then **click** on the 'Refresh' button (circled below) to generate the window. There are a range of drop-down lists and tick boxes that can be selected to refine the report.



The user can view only Requests for Quotes by **clicking** in the **Select RFQ Only** box to tick and then **click** on the 'Refresh' button again. The **Show RFQ Only** tick box will show the date of the request when ticked.



The 'Sub Total' tab displays the quote amounts per employee and by client, these lists can be printed and / or viewed as an Excel Data Graph. **Click** on the Refresh buttons to display the lists.



To Print a Report

Click on the 'Print' button (1) to display the 'Print Data Table' window. The report can be customised by ticking or un-ticking the boxes to show/hide columns (2). **Click** on the 'Preview' button (3) to view the report before printing and **click** on the 'Print' button (4) to print the report, the 'Reset' button (5) resets the properties of the report.

