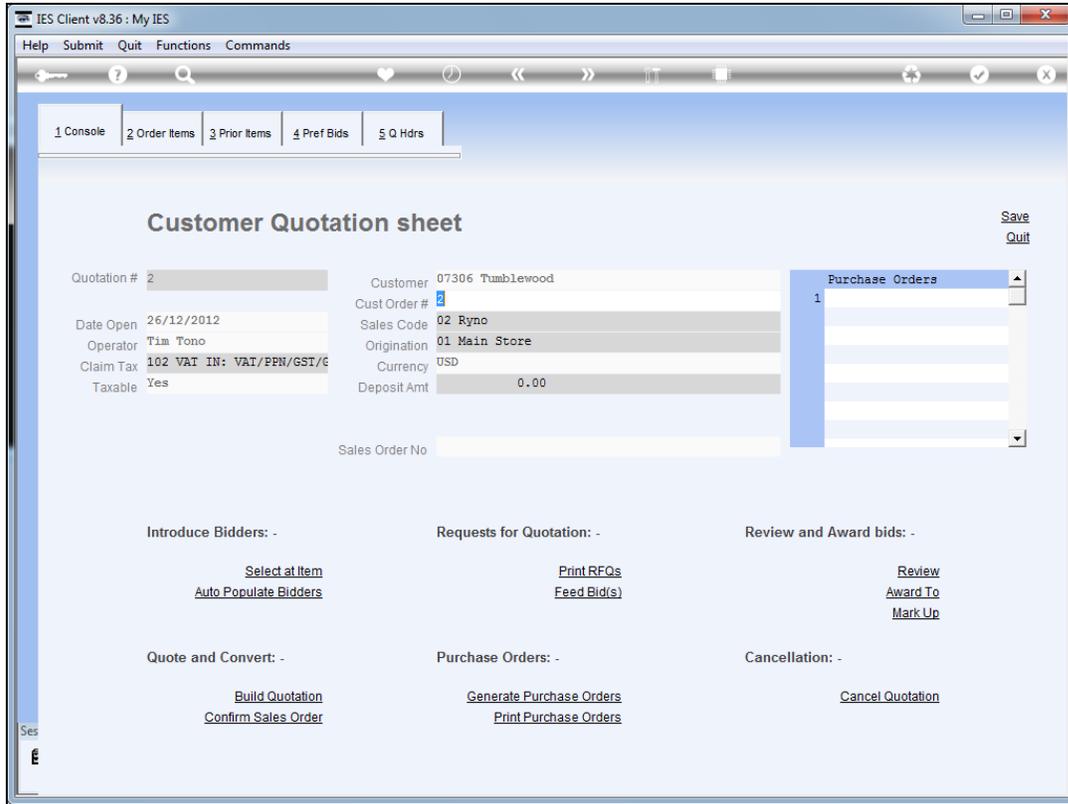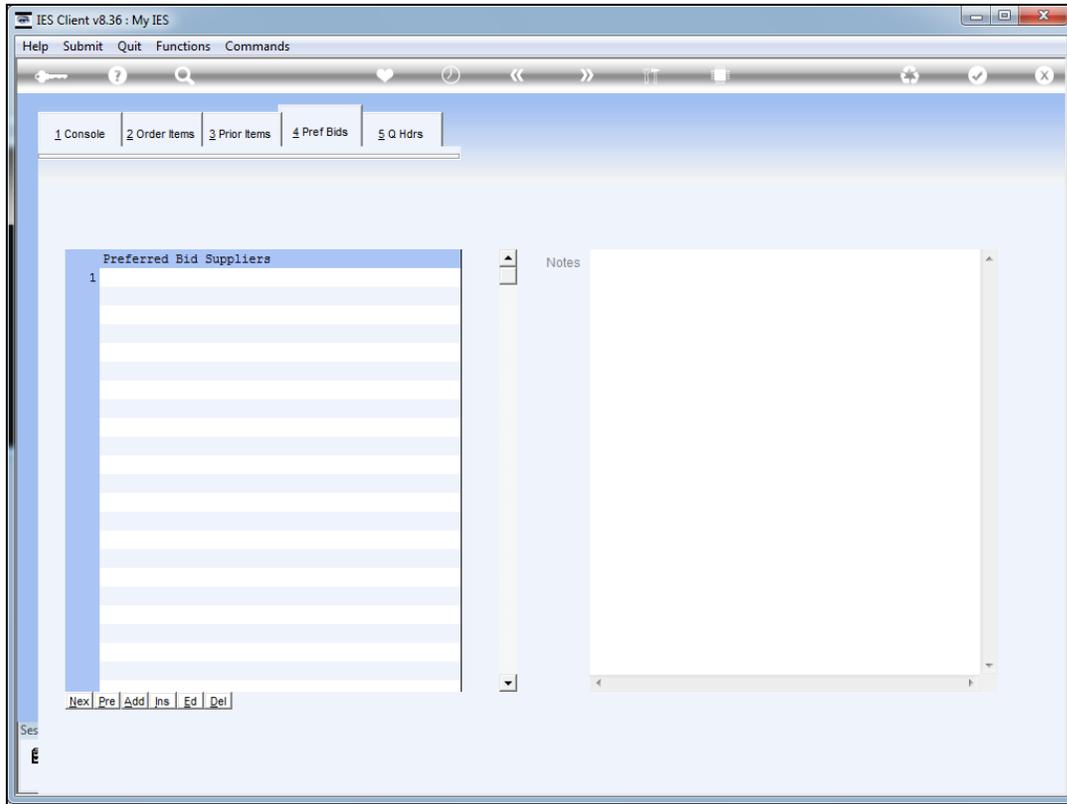Slide 1

Slide notes: If a quotation has not been converted to a Sales Order yet, then it can be cancelled at any stage.
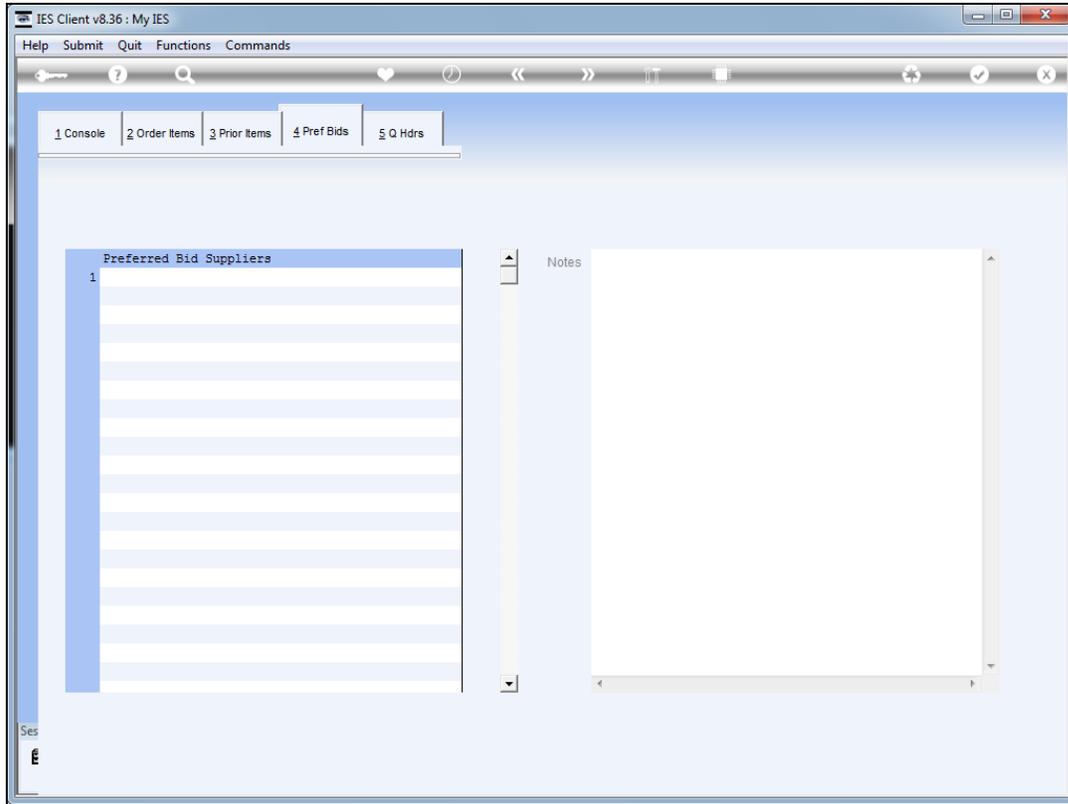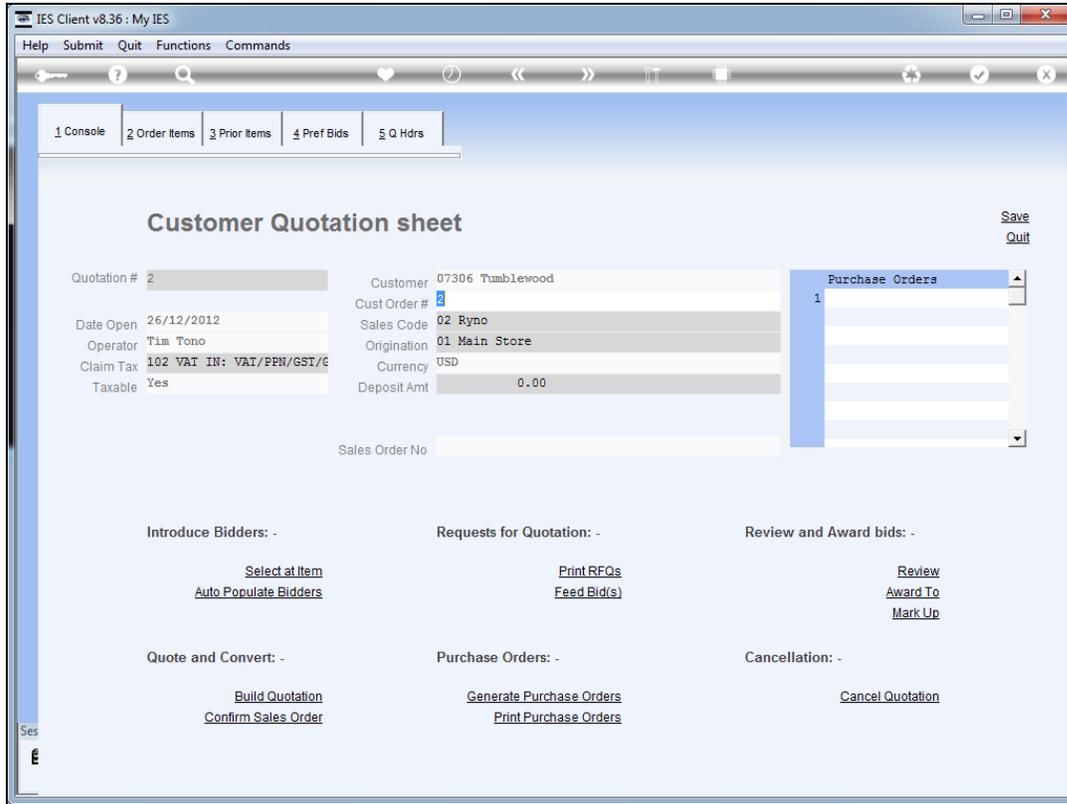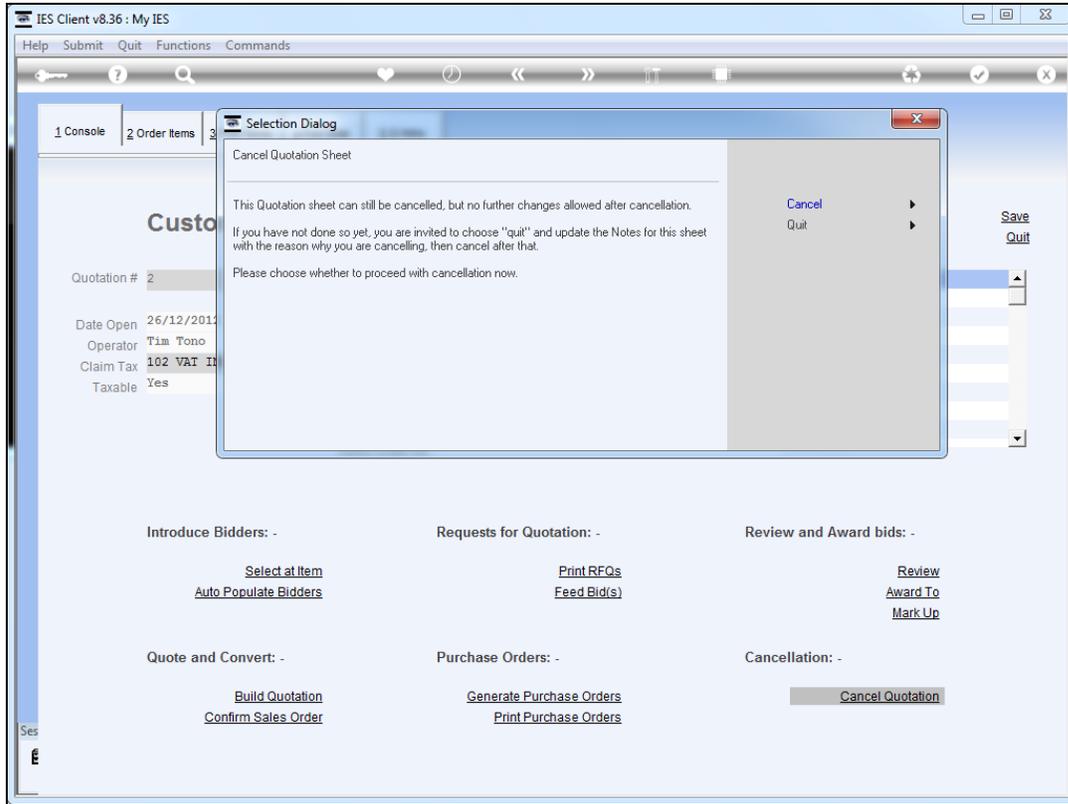
Slide 2
Slide notes:

Slide 3

Slide notes: It is recommended that we record a note as to why the quotation is being cancelled, because this note will still be visible on the cancelled quotation.
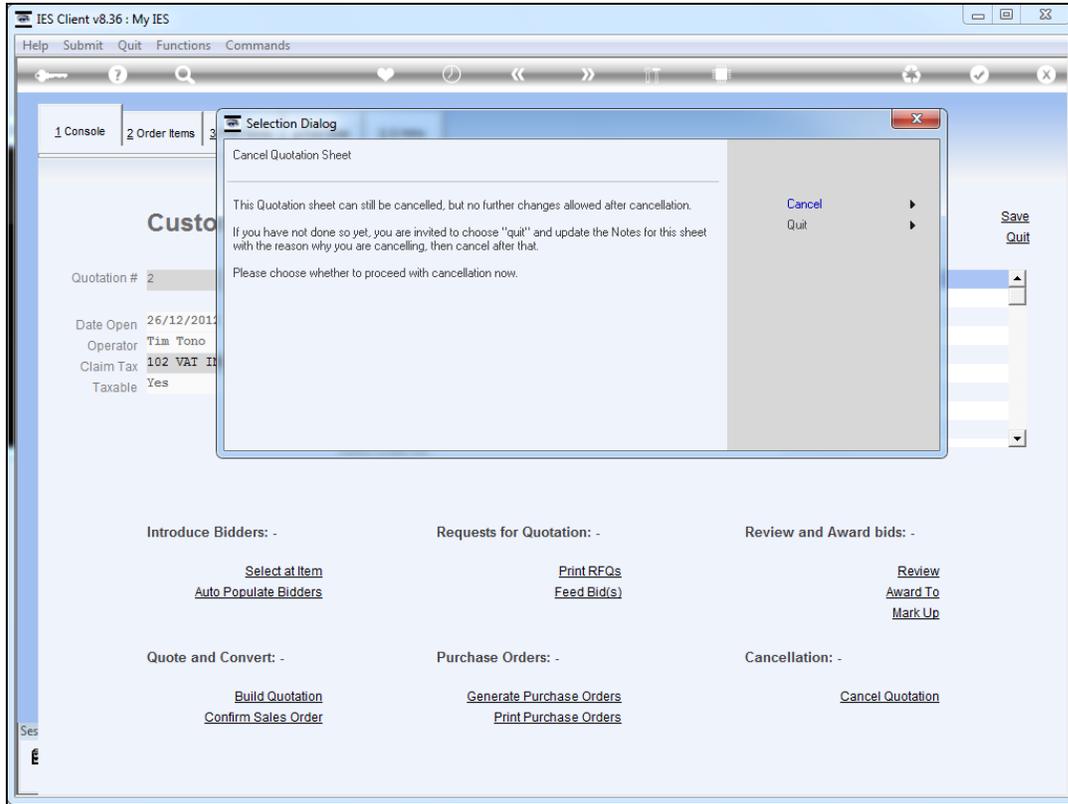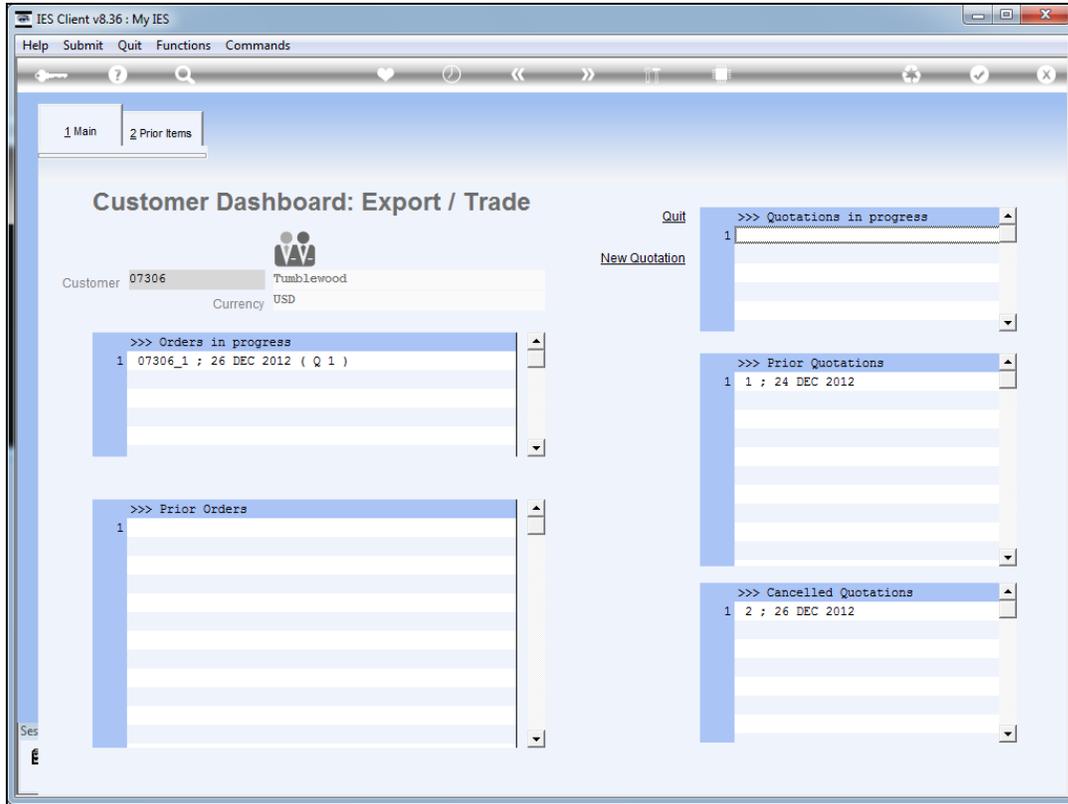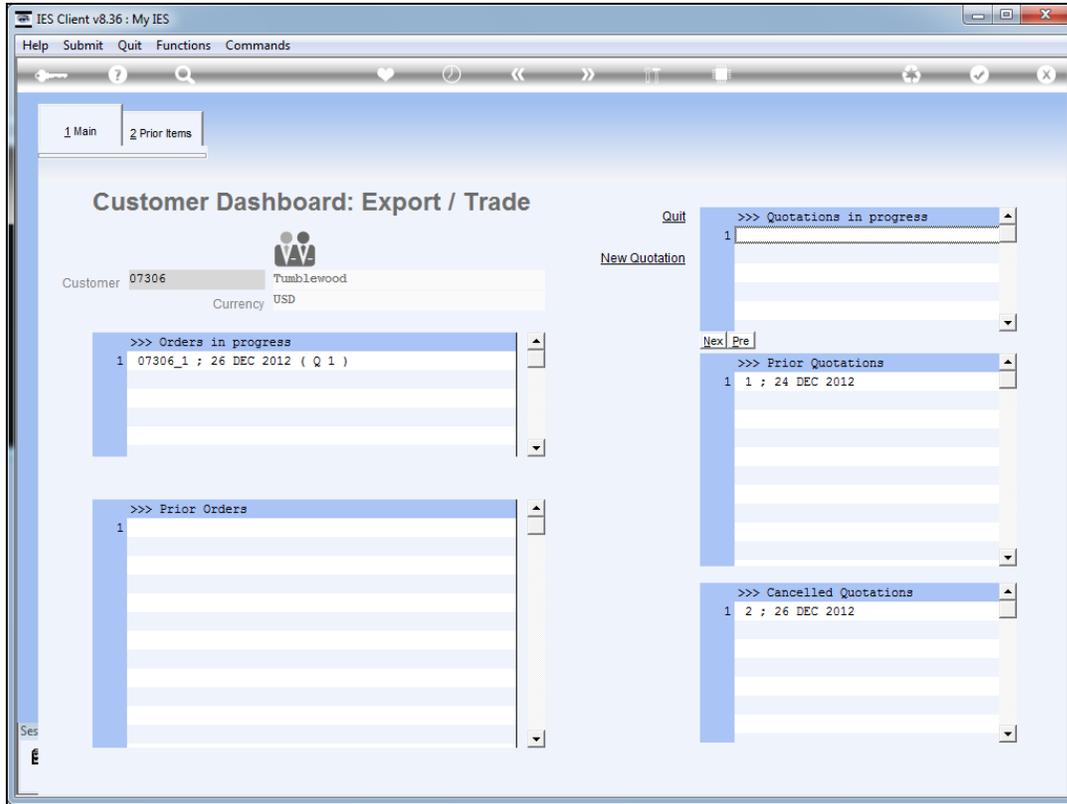
Slide 4
Slide notes:

Slide 5
Slide notes:
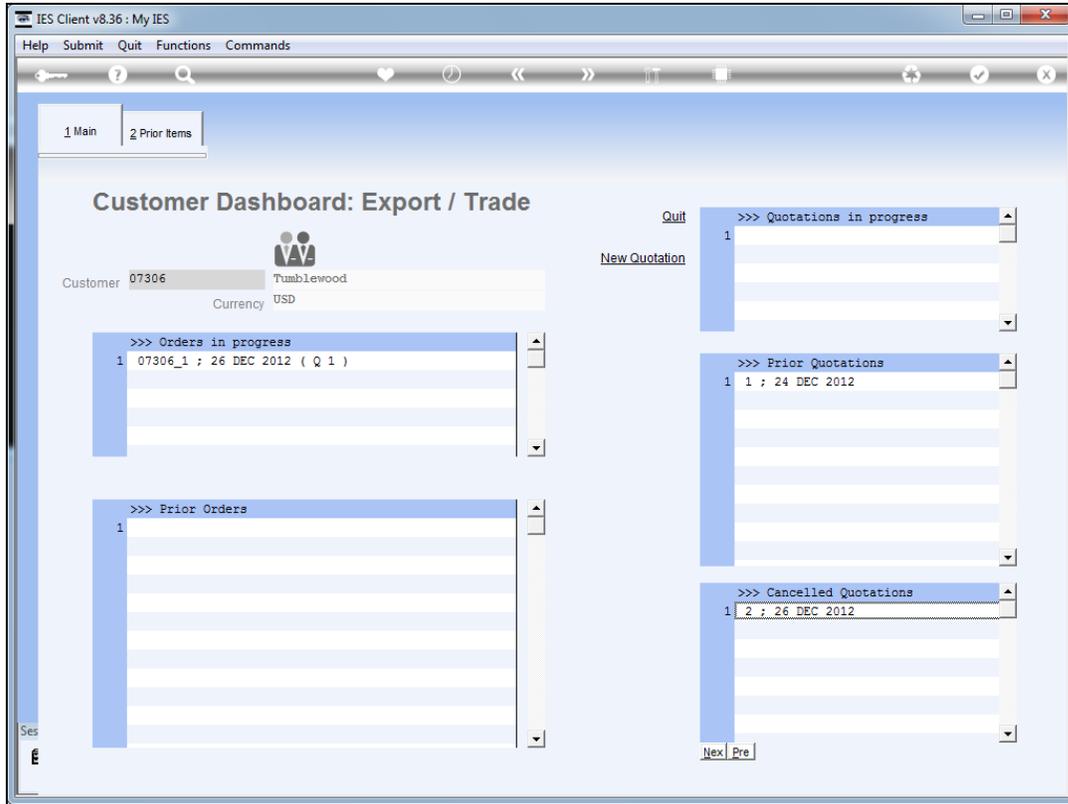
Slide 6
Slide notes:

Slide 7
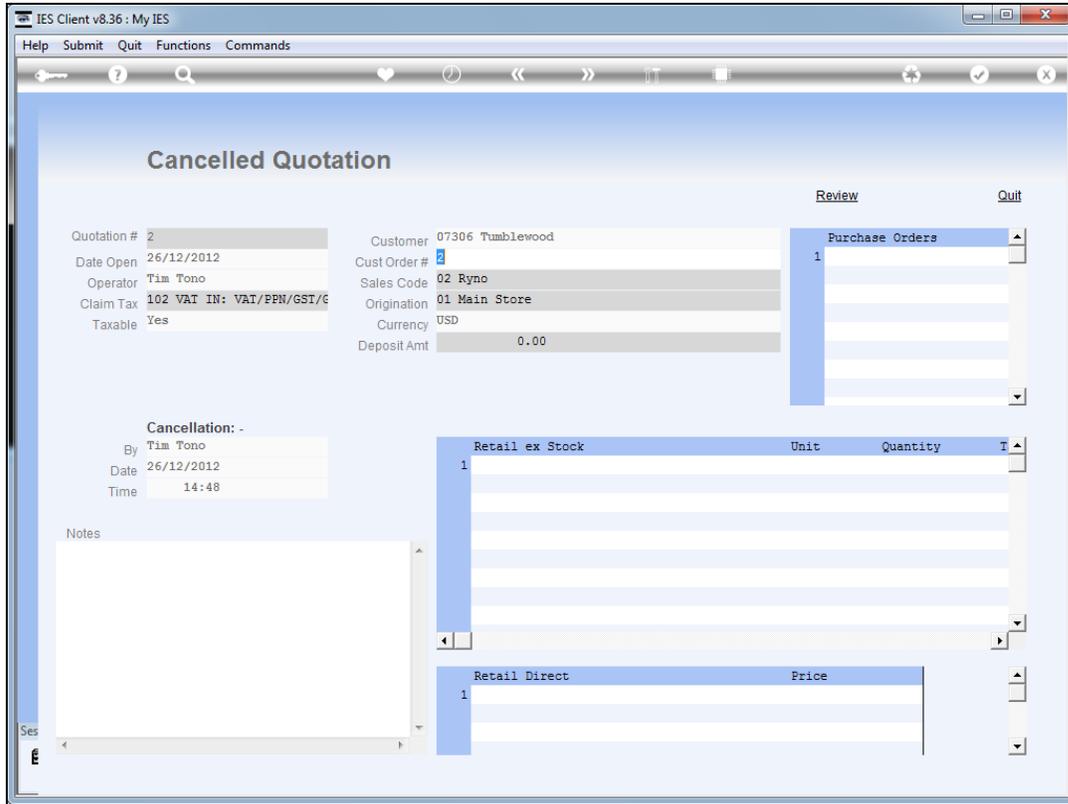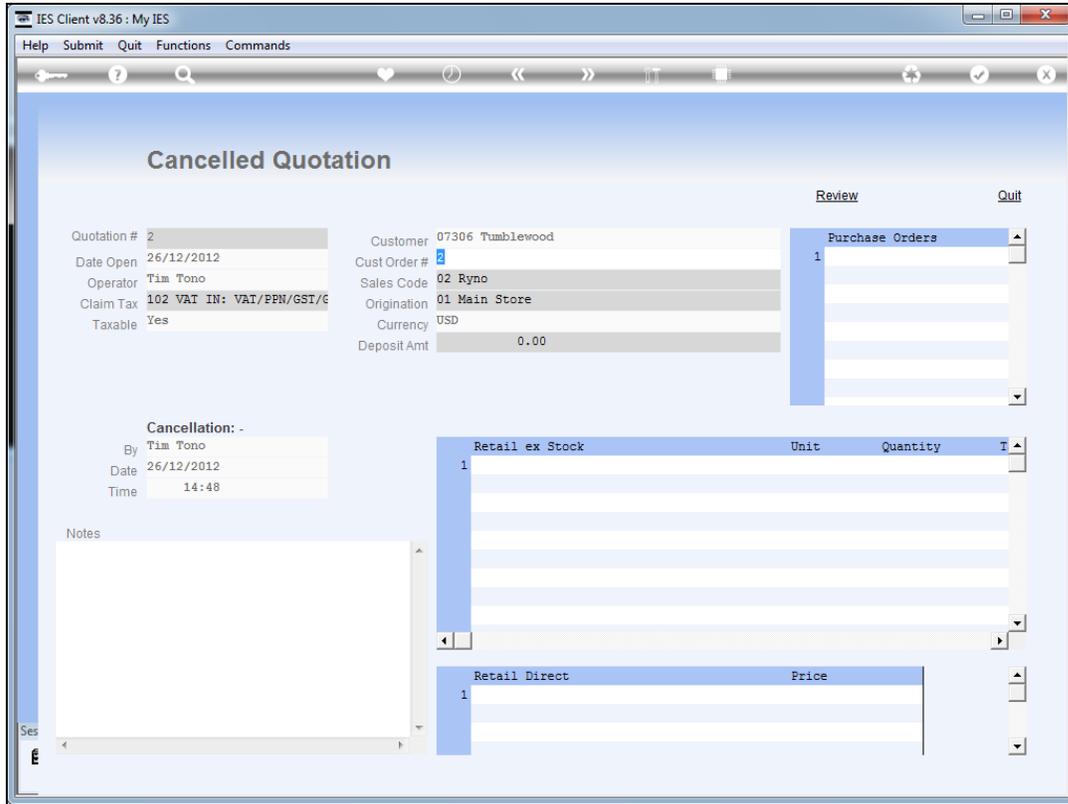Slide notes:

Slide 8
Slide notes:

Slide 9

Slide notes: The quotation automatically moves to the "cancelled" group on the Customer dashboard, and we can drill into it to see who cancelled it, when, and if there is a note to explain why, we can see that too.
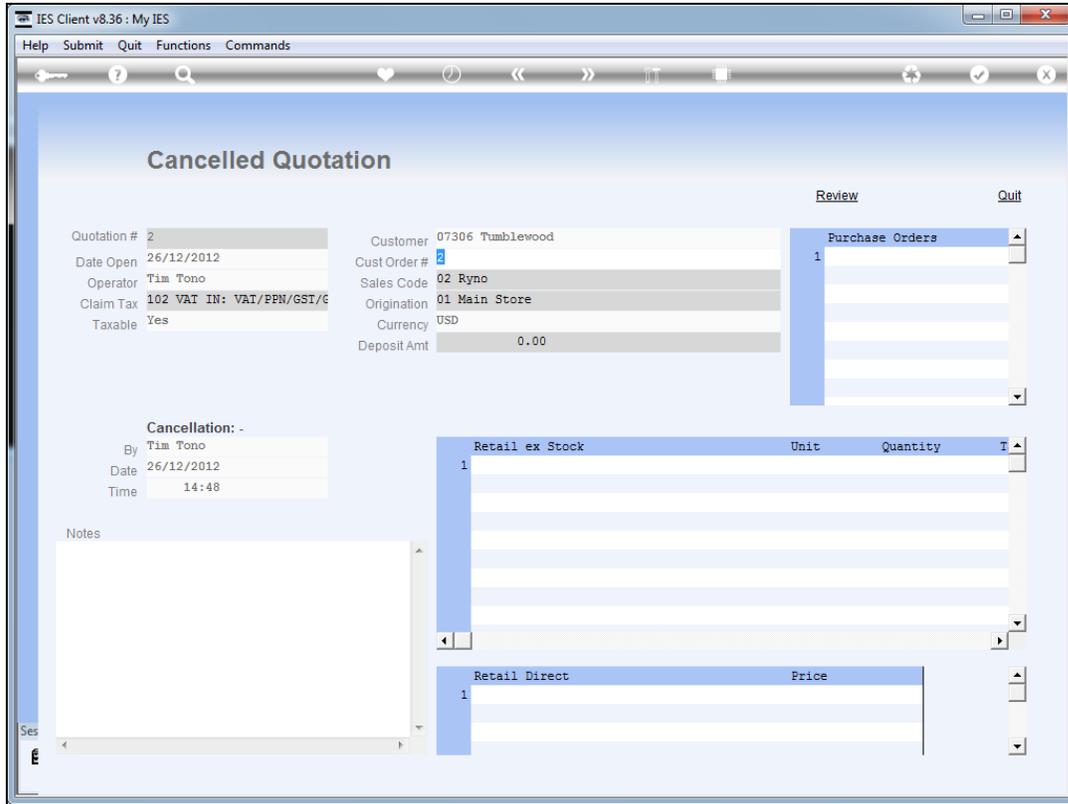
Slide 10
Slide notes:

Slide 11

Slide notes:

Slide 12
Slide notes:

Slide 13
Slide notes: