



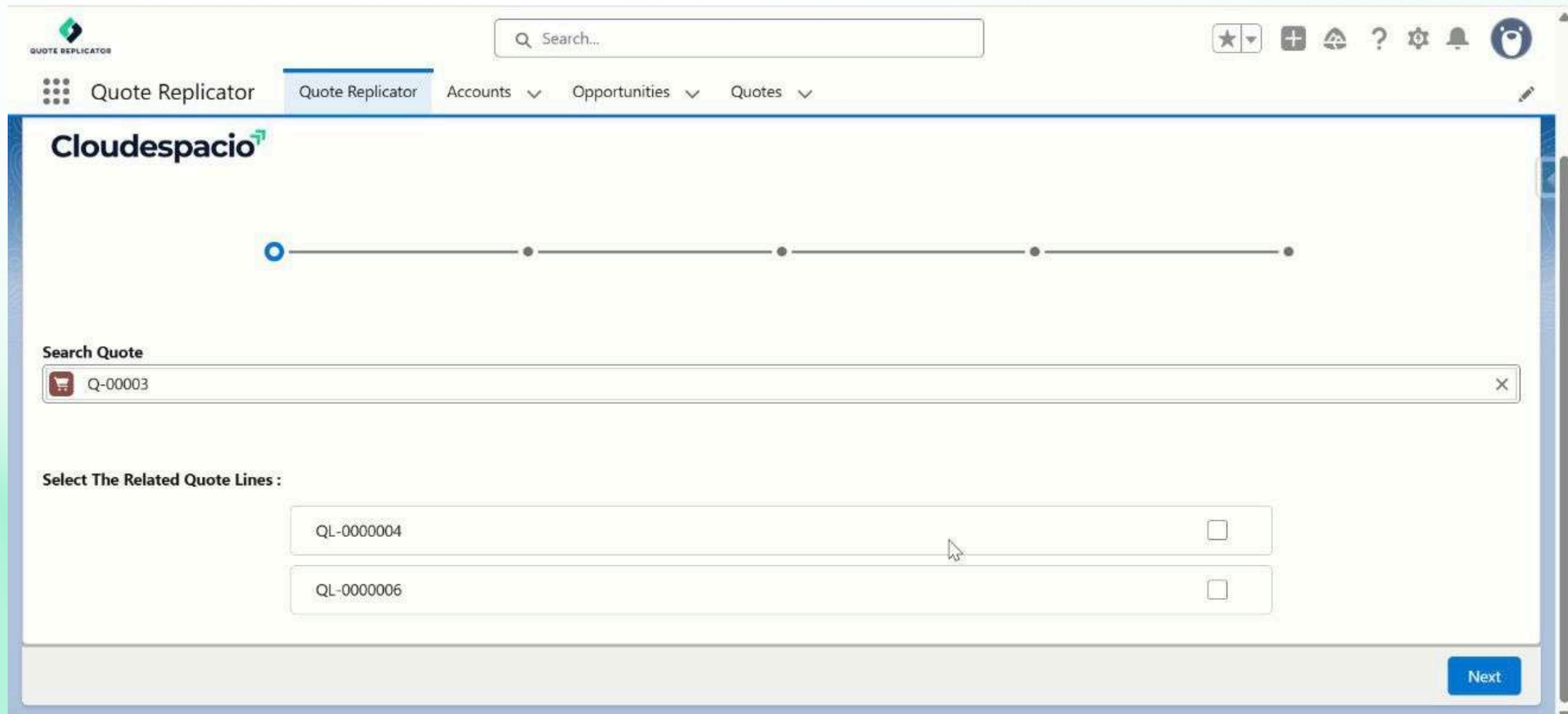
QUOTE REPLICATOR

Instantly clone Quotes and Line Items
to speed up your sales process.



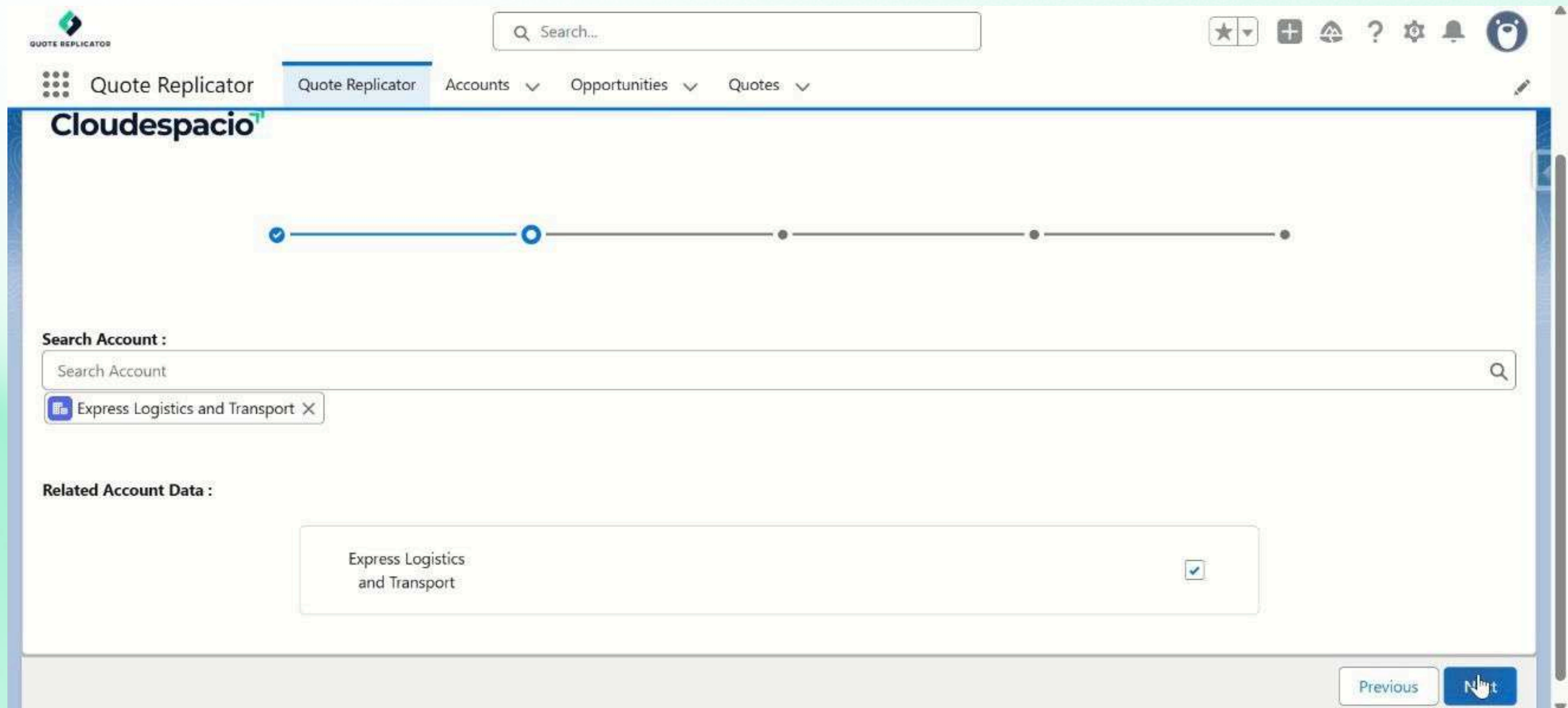
SELECT QUOTE & LINE ITEMS

Pick the Quote and associated Line Items you want to clone



The screenshot displays the 'Quote Replicator' interface within the Cloudeespacio⁷ application. The top navigation bar includes a search bar, a star icon, a plus icon, a home icon, a question mark, a settings gear, a bell, and a user profile icon. Below the navigation bar, the 'Quote Replicator' tab is active, with sub-tabs for 'Accounts', 'Opportunities', and 'Quotes'. The main content area features a progress bar with five steps, the first of which is highlighted. Below the progress bar, there is a 'Search Quote' section with a search bar containing 'Q-00003'. Underneath, the 'Select The Related Quote Lines :' section lists two items: 'QL-0000004' and 'QL-0000006', each with an associated checkbox. A 'Next' button is located at the bottom right of the interface.

02 ➤ Choose the Account where the opportunity and new cloned Quote should be associated & Click on Next button



The screenshot displays the Cloudespacio Quote Replicator web application. At the top, there is a navigation bar with the 'Quote Replicator' logo, a search bar, and several utility icons. Below the navigation bar, a breadcrumb trail shows 'Quote Replicator' followed by 'Accounts', 'Opportunities', and 'Quotes'. The main content area features a progress bar with five steps; the first step is completed (indicated by a blue checkmark), and the second step is currently active (indicated by a blue circle). Below the progress bar, the 'Search Account' section contains a search input field and a dropdown menu showing 'Express Logistics and Transport' with a close button. The 'Related Account Data' section below it displays a table with one row: 'Express Logistics and Transport' with a checked checkbox. At the bottom right, there are 'Previous' and 'Next' buttons, with the 'Next' button being highlighted by a mouse cursor.

Quote Replicator

Search...

Quote Replicator Accounts Opportunities Quotes

Cloudespacio⁷

Search Account :

Search Account

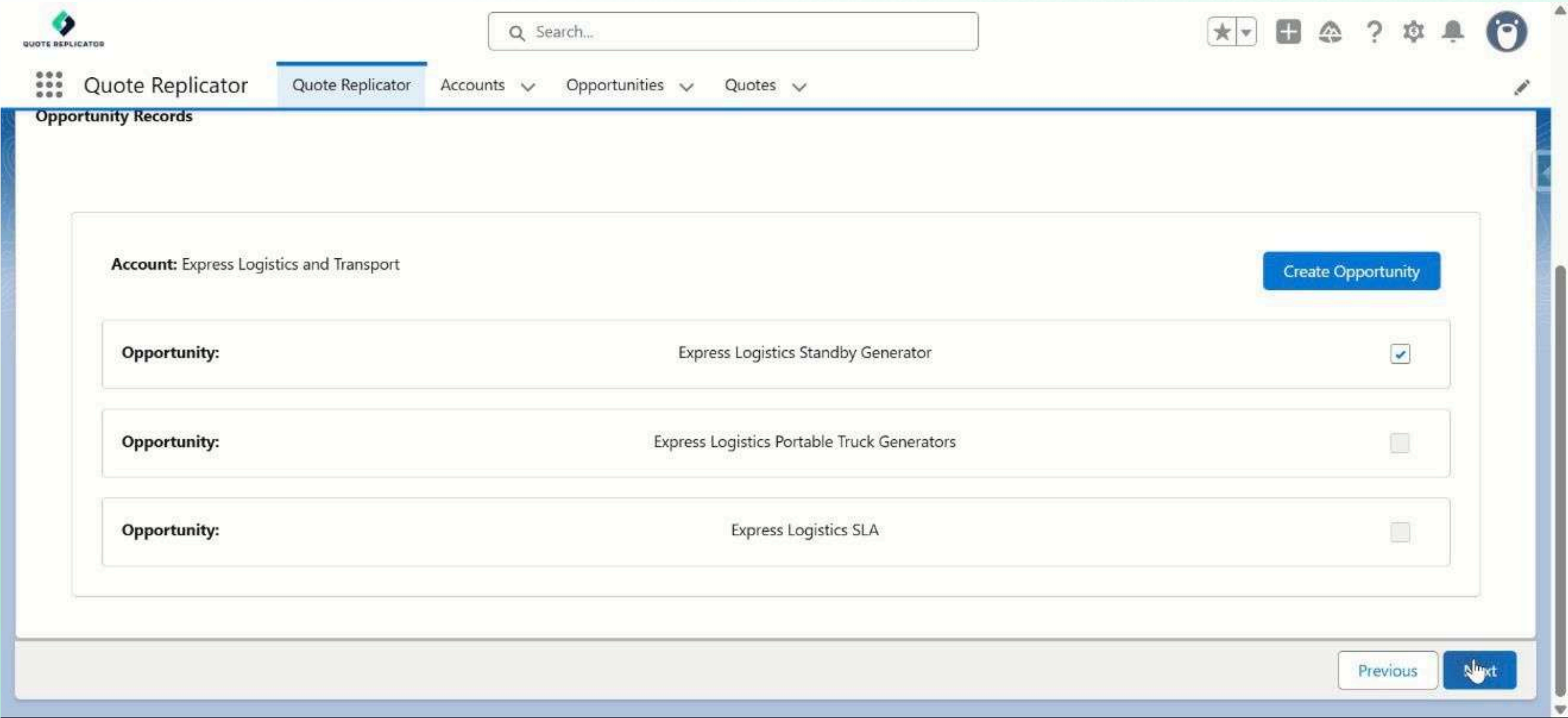
Express Logistics and Transport X

Related Account Data :

Express Logistics and Transport	☒
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Previous Next

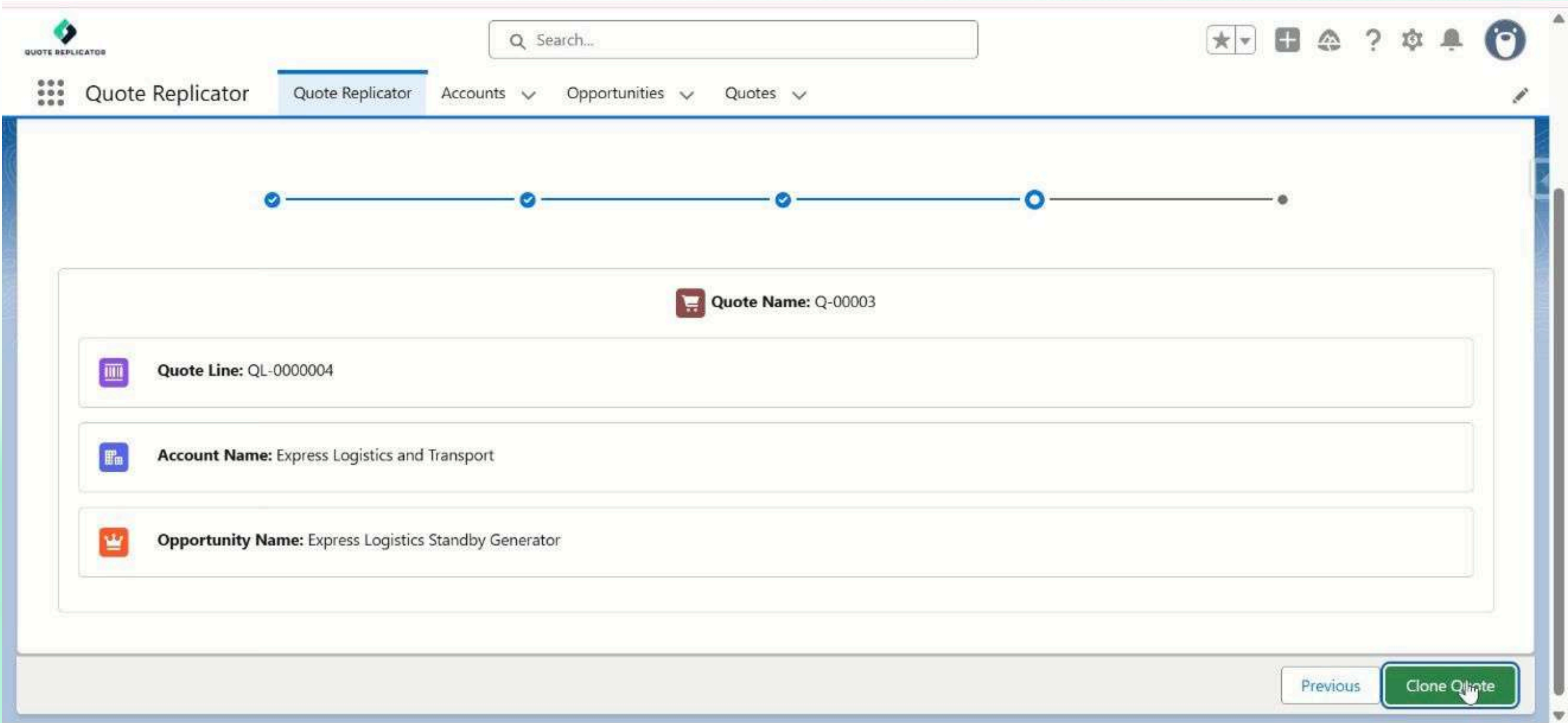
03 ➤ Choose the Opportunity where the new cloned Quote should be associated & Click on Next button



The screenshot shows the 'Opportunity Records' form in the Quote Replicator application. The form is titled 'Opportunity Records' and is located under the 'Quote Replicator' tab. The form contains a section for 'Account: Express Logistics and Transport' with a 'Create Opportunity' button. Below this, there are three rows of 'Opportunity' records, each with a checkbox for selection. The first row is 'Express Logistics Standby Generator' (checked), the second is 'Express Logistics Portable Truck Generators' (unchecked), and the third is 'Express Logistics SLA' (unchecked). At the bottom right, there are 'Previous' and 'Next' buttons.

Opportunity	Selected
Express Logistics Standby Generator	☒
Express Logistics Portable Truck Generators	☐
Express Logistics SLA	☐

04 Step click on Clone Quote button



The screenshot displays the Quote Replicator interface. At the top, there is a search bar and navigation tabs for Quote Replicator, Accounts, Opportunities, and Quotes. A progress bar indicates the current step in the process. The main form contains the following fields:

- Quote Name:** Q-00003
- Quote Line:** QL-0000004
- Account Name:** Express Logistics and Transport
- Opportunity Name:** Express Logistics Standby Generator

At the bottom right, there are two buttons: "Previous" and "Clone Quote". The "Clone Quote" button is highlighted with a mouse cursor, indicating the next step in the process.

05 ➡ Newly created quote appears in the table.
Click it to open the quote's detail page

QUOTE REPLICATOR

Quote Replicator

Accounts

Opportunities

Quotes

Q Search...

★

+

🏠

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⚙️

🔔

👤

Quote Replicator

Cloudespacio

✓

✓

✓

✓

○

Cloned Records

Quote Name	Opportunity	Account
Q-00024	Express Logistics Standby Generator	Express Logistics and Transport

[Home](#)