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How do I preview a quote in PDF?

- 2023-10-17 - Comments (0) - Lasernet CE Connector FAQs

Lasernet for Dynamics 365

Once you have accessed the CRM system, you can preview a quote in PDF. Follow the steps listed below:

1. On the Sales menu, click the drop-down menu to show the navigation menu flyout, and then under the Sales flyout, click **Quotes** in the *Collateral* list.



The **Quotes** page is displayed.

2. From the My Quotes list, select the quote you want to preview and click it.

→ My Quotes *			Search for records	2
□ Name ↑	Status	Total Amount Potential Customer	Email (Potential Custo	T O (
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As a result, a quote page opens.

3. On the quote page, click the **LASERNET** dropdown button and then click **Run report** in the context menu that appears.

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As a result, a quote opens as a PDF file in a separate window.

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Note

If a separate window does not appear, verify your pop-up blocker to make sure it has not

blocked the window.