

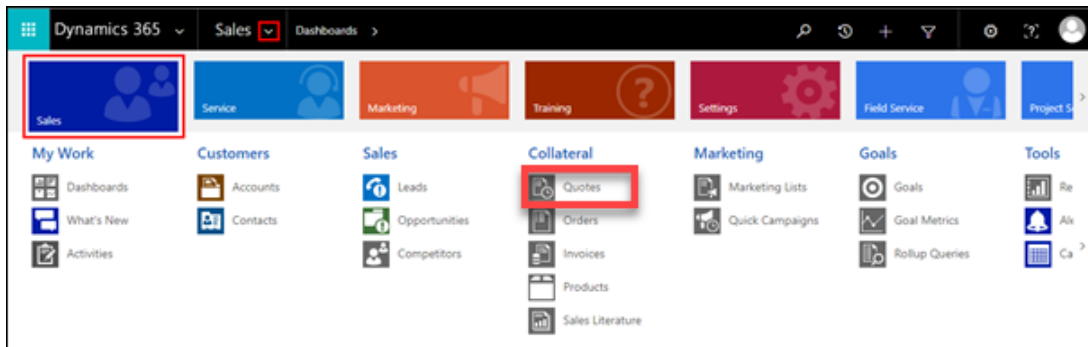
How do I preview a quote in PDF?

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

Lasernet for Dynamics 365

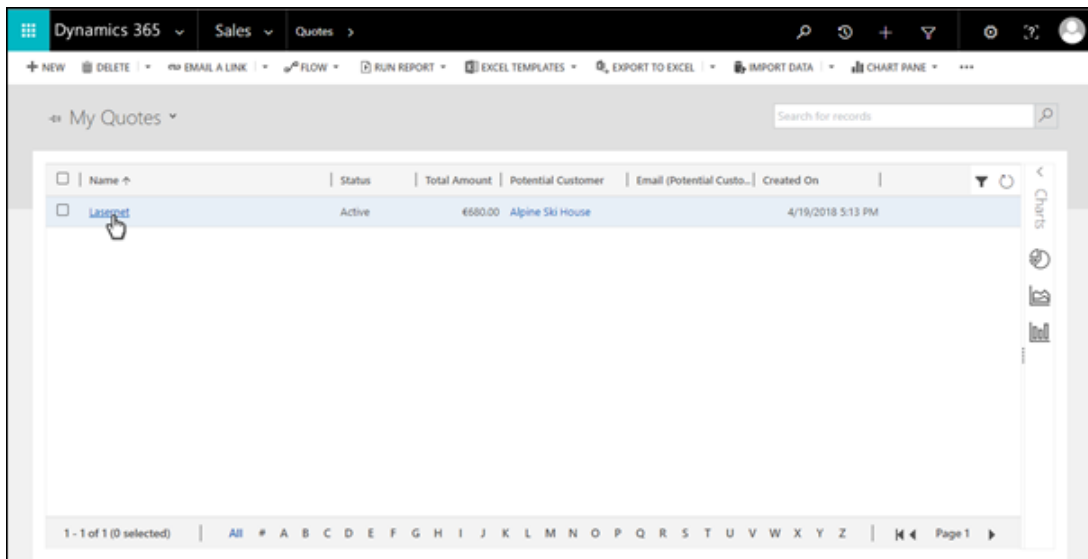
Once you have accessed the CRM system, you can preview a quote in PDF. Follow the steps listed below:

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.



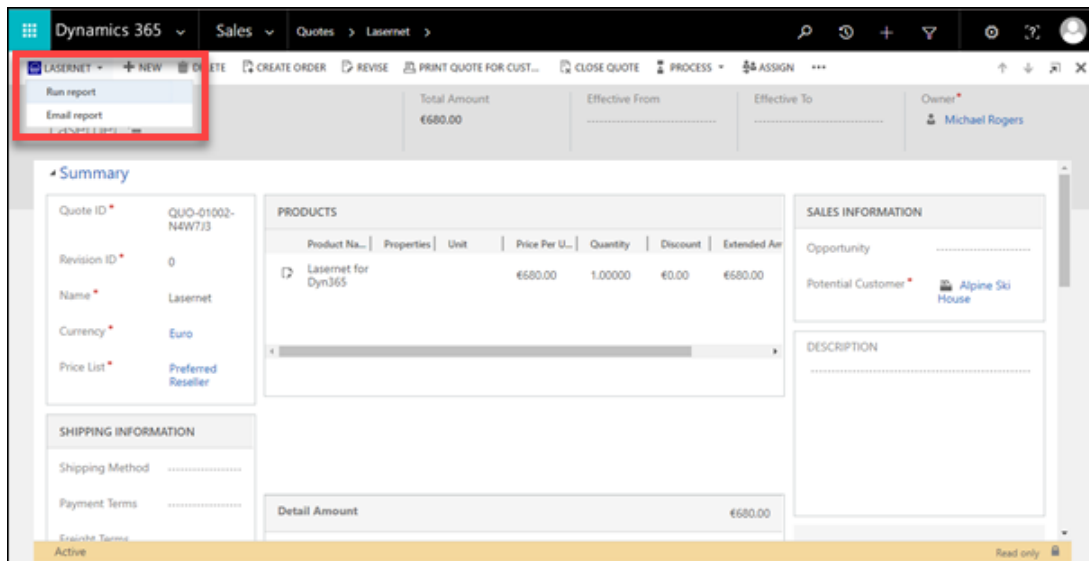
The **Quotes** page is displayed.

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

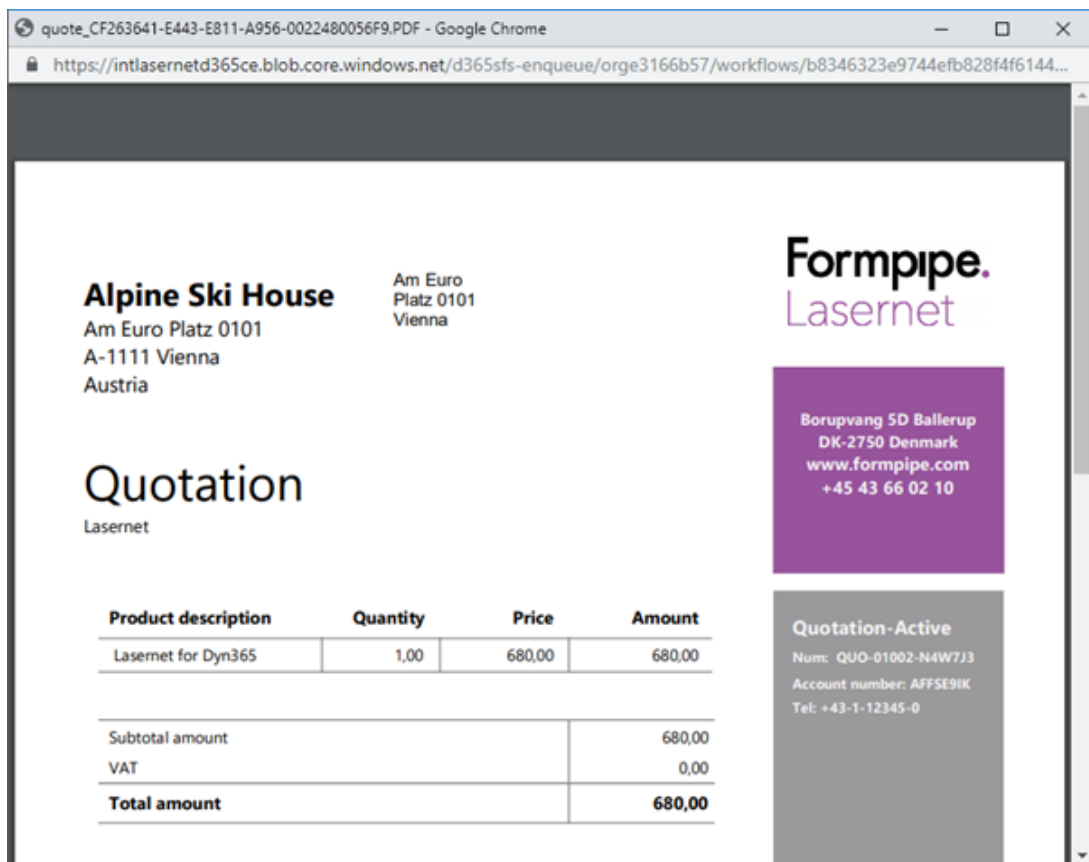


As a result, a quote page opens.

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



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



Note

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

blocked the window.