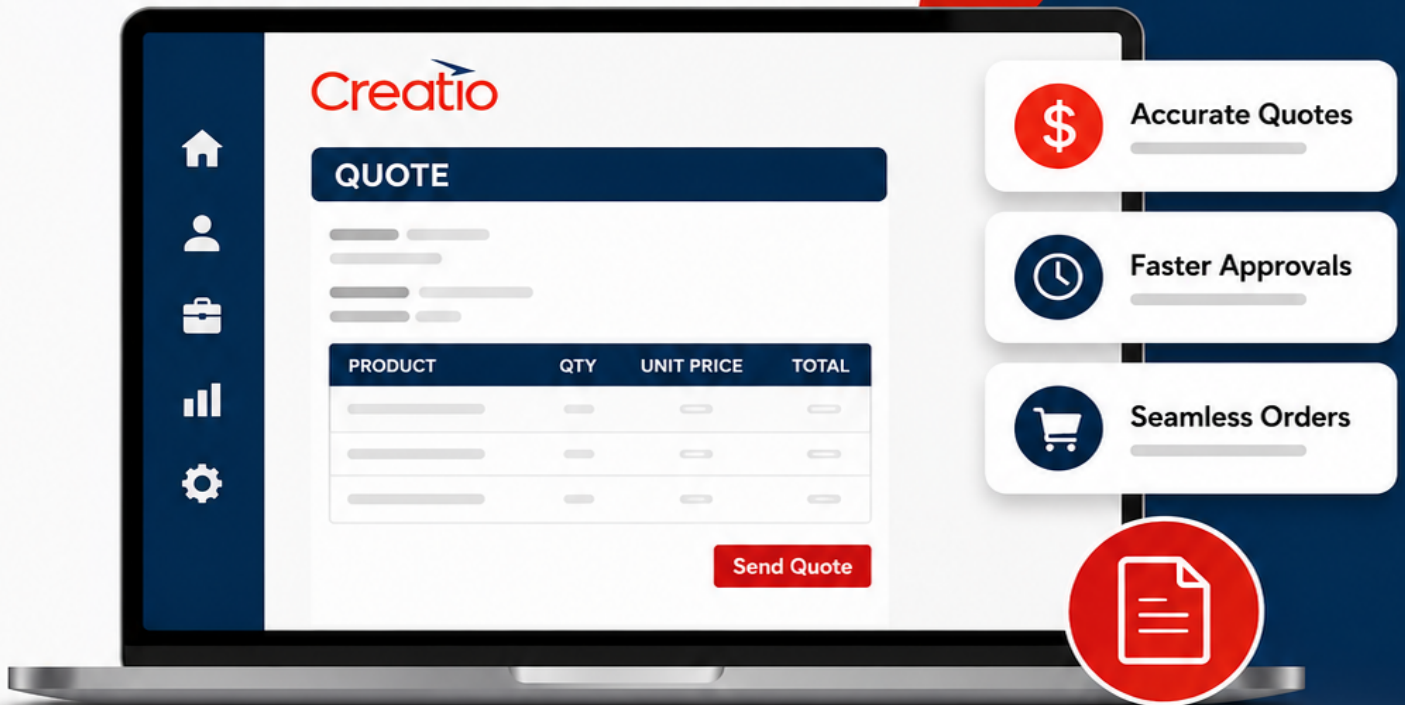


INTRODUCING

Quote Management for Creatio

From opportunity to order —
your entire quoting process,
inside Creatio.



Between winning an opportunity and creating an order, the quoting stage is often the least structured part of the sales process. For many teams, it means working outside the CRM — building documents manually, tracking versions separately, and re-entering data when a deal finally closes.

Quote Management for Creatio brings that process back into the system. This extends the existing sales process by introducing structured quote management between Opportunities and Orders.



**Manage Quotes
and Products**



**Generate Ready-to-
Send Documents**

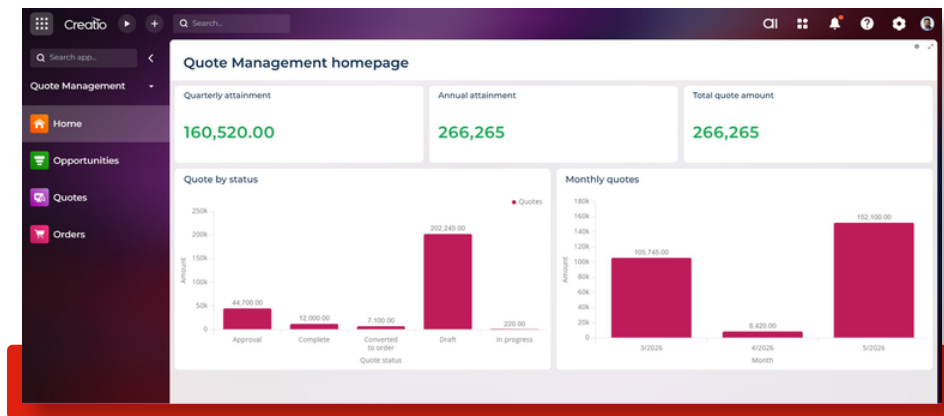


**Convert Quotes
to Orders**

Quote Visibility from Opportunity to Order

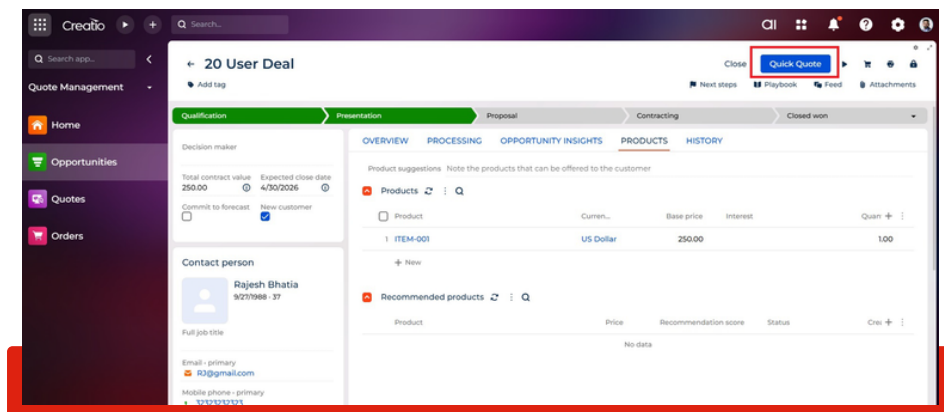
- **Monitor All Quotes in One Place**

The Home Page gives you a centralised dashboard view of all quotes — across statuses, stages, and owners. Track what is active, what is pending, and what needs attention, all from a single screen.



- **Create Multiple Quotes Directly from Opportunities**

Opportunity records now include a Quick Quote button, letting your sales team generate a linked quote without leaving the opportunity. Multiple quotes can be raised against the same opportunity — useful when presenting different pricing scenarios to a prospect.



- **View and Manage All Quotes in One List**

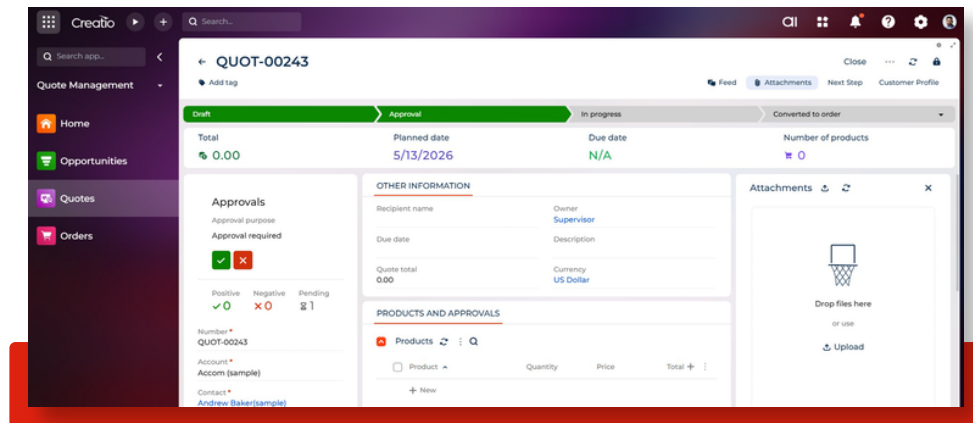
The Quotes section provides a dedicated list view of every quote in the system. Filter, search, and access records quickly — with full visibility into quote status, ownership, and Opportunity information.

The screenshot shows the 'Quotes' list view. It includes a sidebar with navigation links: Home, Opportunities, Quotes, and Orders. The main content area displays a table of quotes with columns: Number, Account, Contact, Created on, Opportunity, and Currency. The table contains 11 rows of quote data.

Number	Account	Contact	Created on	Opportunity	Currency
1 QUOT-00041	Accom (sample)	Andrew Baker(sample)	3/13/2026 5:45 PM	008 Accom / Sale of Good...	US Dollar
2 QUOT-00089	A to Z Incorporation	Andrew Baker(sample)	3/31/2026 4:50 PM		US Dollar
3 QUOT-00235	Accom (sample)	Andrew Baker(sample)	5/13/2026 3:45 PM		US Dollar
4 QUOT-00223	Accom (sample)	Andrew Baker(sample)	5/13/2026 2:17 PM		US Dollar
5 QUOT-00047	Accom (sample)	Andrew Baker(sample)	3/16/2026 10:44 AM	008 Accom / Sale of Good...	US Dollar
6 QUOT-00035	Accom (sample)		3/13/2026 5:27 PM	008 Accom / Sale of Good...	US Dollar
7 QUOT-00026	Our company		3/13/2026 3:38 PM		US Dollar
8 QUOT-00064	Accom (sample)	Andrew Baker(sample)	3/17/2026 2:26 PM		US Dollar
9 QUOT-00107	Accom (sample)	Andrew Baker(sample)	4/1/2026 5:06 PM		US Dollar
10 QUOT-00071	A to Z Incorporation	Andrew Baker(sample)	3/24/2026 12:37 PM	500 Users of Software	US Dollar
11 QUOT-00009	Accom (sample)		3/13/2026 11:26 AM		US Dollar
12 QUOT-00056	Accom (sample)	Andrew Baker(sample)	3/16/2026 3:58 PM	Hardware / Accom (sample)	US Dollar

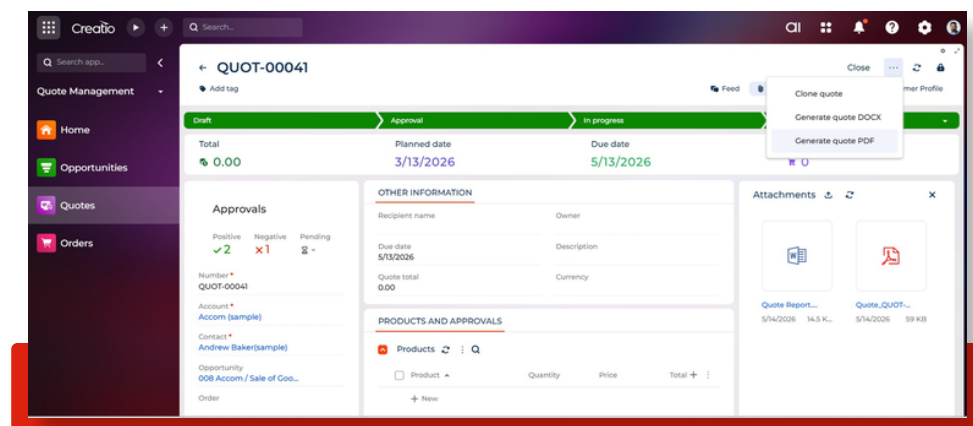
- **Build Quotes with Full Product Detail**

Add products, set quantities, apply pricing, and organise line items within the quote record. Every quote captures the full detail of the deal — account, opportunity, products, and pricing — in one structured view.



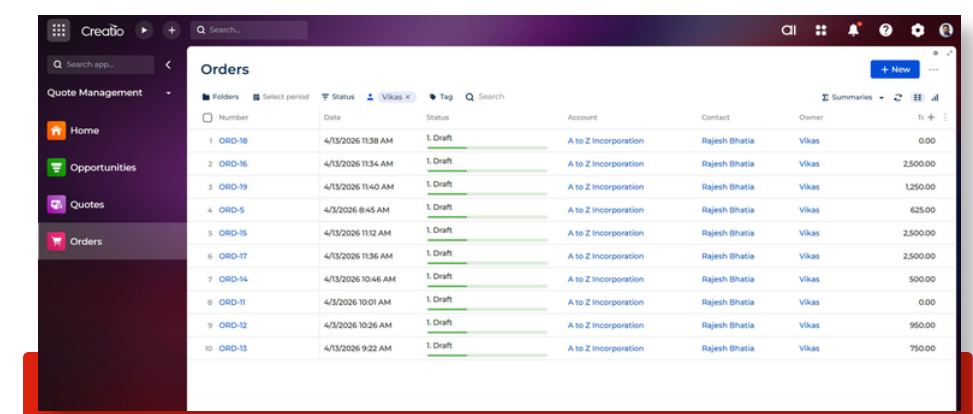
- **Clone, Export, and Share Quotes Quickly**

Existing quotes can be cloned and adjusted for repeat or similar deals — no need to start from scratch. Once a quote is ready, export it as a formatted Word document or PDF directly from the record, ready to send with consistent formatting and branding.



- **Move Quotes Through Approval and Convert to Orders**

A built-in workflow takes each quote through the required approval stages. Once approved, the quote converts into an order in one action — with all product details, pricing, and account information carried over automatically.



Close Every Deal with a Complete Quote Cycle



With a structured quoting layer built directly into Creatio, your sales team works within one connected system from the first conversation to the closed deal. Every quote is tracked, documented, and ready to move — keeping your sales cycle complete from first conversation to closed deal.

About Greytrix

25 Years of ERP Excellence

Trusted by **5000+ businesses across the globe**, Greytrix specializes in cloud integrations that simplify complex operations.

Our GUMU™ framework powers seamless connectivity between leading **CRMs and ERPs — from Salesforce to Sage 100.**

With 25 years of expertise and **30+ certified consultants**, we help businesses **work smarter, integrate faster, & grow stronger.**



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