DIANO

DIANO ACADEMY · CHECK

M02 Quotes: the 5-question check

Answer on your own. Choose one answer for each question unless it says otherwise.

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NAME	DATE
COMPANY	SCORE / 5

1. What happens when you press Issue quote?

- ☐ a) The quote is e-mailed by DIANO automatically
- ☐ b) Its number, date and lines are fixed
- ☐ c) It becomes an invoice
- ☐ d) It is deleted

2. The customer asks for a change to an issued quote. What do you do?

- ☐ a) Edit the issued quote's lines
- ☐ b) Delete it and start again
- ☐ c) Press ···, then Edit (new revision)
- ☐ d) Make a credit note

3. Which quote can still be turned into an invoice?

- ☐ a) An issued quote
- ☐ b) An expired quote
- ☐ c) A declined quote
- ☐ d) A converted quote

4. What does Create sales order ask for first?

- ☐ a) The customer's bank details
- ☐ b) The customer's purchase order number
- ☐ c) The delivery driver's name
- ☐ d) A second person's approval

5. Can you send a Draft quote by WhatsApp?

- ☐ a) Yes, always
- ☐ b) Only on a phone
- ☐ c) No: issue it first
- ☐ d) Only to VAT-registered customers

Pass mark: 4 out of 5. Your trainer marks this check. Nothing you write here is stored by DIANO.