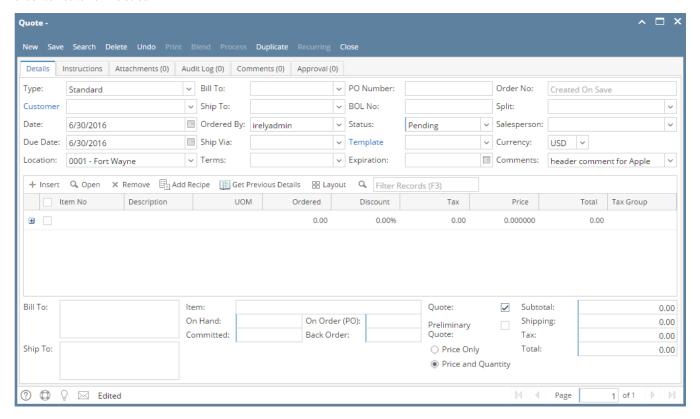# Quote

The Quote screen allows you to create, edit, and view information on a potential sale for a customer. This screen is used to provide your customer or potential customer with a quote. Open the screen from **Sales folder | Sales Orders menu**, click New on the integrated search grid, and check the **Quote checkbox** button on the screen.

Field Description

Header Details:

Type - This field will default to Standard. Used this field to determine what type of transaction you are intending to create or process. The options are Standard and Software.

Customer - Select a **Customer** from the combo list box. Some of the fields, like **Salesperson, Bill To**, **Ship To**, **Ship Via**, **Terms**, and **Currency**, are filled in with details in Customer screen.

Date - This will default to today's date. This can be changed to whatever date the customer placed the order.

Due Date - This is a computed date based on the Quote Date and Terms used. You can assign a different date if necessary.

Location - By default, this will show the default location assigned to a user. You can select another location if necessary. Note that the list shows the **active Company Location** records only. If the Location you need is not in the list, you will have to add it to the Company Locations screen.

Bill To - By default, this field will show the assigned Bill To to the selected customer. This can be changed to another Bill To location if necessary.

Ship To - By default, this field will show the assigned Ship To to the selected customer. This can be changed to another Ship To location if necessary.

Ordered By - Use this field to show the order taker. This will default to the username of the user currently logged in.

Ship Via - This field will display the default Ship Via of the selected Ship To. You can select another Ship Via from the combo list box if necessary. If the Ship Via you need is not the in the list, you will have to add it to the Ship Via screen.

Terms - This field will display the default Terms assigned to the selected Customer. You can select other Terms from the combo list box if necessary. Note that the list will show active Terms only. If the Terms you need is not in the list, you will have to add it to the Terms screen.

PO Number - Enter in this field the Customer's Purchase Order number provided to you for this order.

BOL No - Use this field to enter the bill of lading for the freight services.

Status - Select a new status from the combo list box to show the current status of the order. Your choices are Pending, Expired, Lost, and Won. A new sales order will have a Pending status by default.

- Pending - This is the current status when a new Quote screen is opened and saved.
- **Expired** - Expired status signifies a quote that is no longer valid, but was neither accepted or rejected in the time frame allotted.
- **Lost** - Lost status signifies the deal was lost to another option.
- **Won** - Won status signifies the deal is closed and the quote/purchase agreement has been signed and received by customer.

Template - Select the quote template from the list. If the template you needed is not in the list, you will have to add it to the Quote Template screen. Clicking the Template link will open a new Quote Template screen if field is blank, else it will open the record. The selected template will dictate the content of the Quote Report.

Expiration - This is blank by default. Enter the date or select the date from the mini-calendar. See also How to set Quote Status to Expired

Order No - This field is blank by default. A unique and system generated ID will fill in this field upon saving the new quote. This ID is configured on Starting Numbers screen.

Split - This will define how the order amount will be split between the customers define in the Entity Split. You can select the appropriate split number from the list.

Salesperson - This field will display the default Salesperson of the selected customer. You can select another Salesperson from the combo list if necessary. If the Salesperson is not in the list, you will have to add it to the Salesperson screen.

Currency - This field is used to assign a default currency for each Credit Memo. Upon opening the screen, the Currency value is from **Company Configuration | System Manager | Functional Currency**. Once a customer is selected, this field will get the default currency assigned to the customer. You can still override the Currency if necessary. If the currency you need is not in the list you, will have to add it to the Currency screen.

Comments - Use this field to enter additional information about the quote order.

Grid Details:

Item No - Click the combo box button and select the correct item from the list. The combo list box will display the items available on the selected Location only. Some of the fields, like Description, UOM, and Price, are auto-populated with the details in the item record.

Description - This field will display the description of the selected item. You can edit the description if necessary.

UOM (Unit of Measure) - The field will display the default issue UOM of the Item Location. You can select a new UOM if necessary. If the UOM you are looking for is not in the list, you will have to add it to the list of UOMs for that Item.

Ordered - This will default to 1.00. Enter the correct ordered quantity.

Discount - This will display 0.00 by default. Enter the discount percentage you want to give the customer on the selected item. If you want to give the customer a 5% discount when purchasing a particular item enter 5 in this field.

Tax - This is computed based on the taxing setup of the item and customer. Field is also read-only.

Price - This will display the default Sale Price of the selected Item. You can update this if necessary.

Total - This is computed based on the value in Ordered, Discount, and Price field.

Tax Group - Click the combo box button and select the Tax Group applicable for the item.

Footer Details:

Bill To - This disabled field will display the complete address of the bill to assigned to the Credit Memo.

Ship To - This disabled field will display the complete address of the ship to assigned to the Credit Memo.

Item Information - These disabled fields will display the stock details of the selected item.

- **Item** - will display the Item Number and Description of the selected item in the grid.
- **On Hand** - displays the total on hand quantity. This field changes every time an item is sold or purchased.
- **Committed** - displays the total quantity of the selected inventory item that has been ordered but not yet invoiced/shipped.
- **On Order (PO)** - displays the total quantity on order. This field changed every time a purchase order for the selected inventory item is created.
- **Back Order** - displays the total quantity on back order. This field changes every time an invoice for the selected inventory item is posted where there are not enough stock to complete the order (Shipped qty is less than Ordered qty).

Quote - Will tag and convert the record to Quote if checked. If unchecked, the record is considered as Sales Order and the displayed fields will also change. This field will be disabled when the record is already saved.

Preliminary Quote - If checked, this will allow a quote to be created without any contact information being entered. This allows user to create a quote without any names tied to the quote. This is great for preliminary or budgetary quotes. See also How to Create Preliminary Quote

Price Only - When selected, the grid area will hide the UOM and Ordered fields. This type will allow the user to create a quote without the quantity. See also How to Create a 'Price Only' Quote
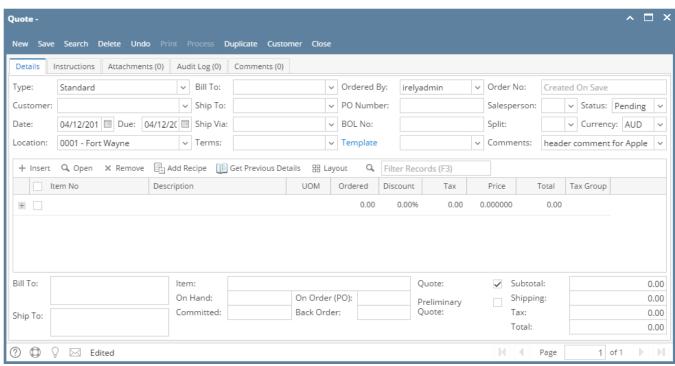
Price and Quantity - This is the default type of Quote. When used, the grid area will display the UOM and Ordered field. See also How to Create Standard Quote
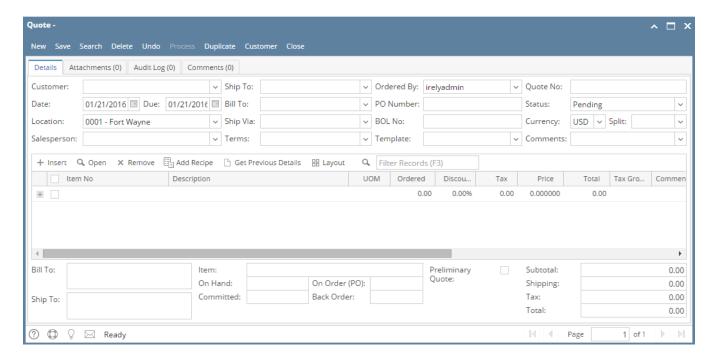
Amount Information

- **Subtotal** - This field will display the total of all the line items entered in the grid.
- **Shipping -** This field will display the shipping cost of the transaction.
- **Tax** - This field will display the total tax of all the line items.
- **Total** - This field will display the total of the transaction which the customer owes you. This is the summation of Subtotal, Shipping, and Tax.

Pages

The Quote screen allows you to create, edit, and view information on a potential sale for a customer. This screen is used to provide your customer or potential customer with a quote. Open the screen from **Sales folder | Quotes menu**.

Field Description

Header Details:

Customer - Select a **Customer** from the combo list box. Some of the fields, like **Salesperson, Bill To**, **Ship To**, **Ship Via**, **Terms**, and **Currency**, are filled in with details in Customer screen.

Date - This will default to today's date. This can be changed to whatever date the customer placed the order.

Due - This is a computed date based on the Quote Date and Terms used. You can assign a different date if necessary.

Location - By default, this will show the default location assigned to a user. You can select another location if necessary. Note that the list shows the **active Company Location** records only. If the Location you need is not in the list, you will have to add it to the Company Locations screen.

Salesperson - This field will display the default Salesperson of the selected customer. You can select another Salesperson from the combo list if necessary. If the Salesperson is not in the list, you will have to add it to the Salesperson screen.

Ship To - By default, this field will show the assigned Ship To to the selected customer. This can be changed to another Ship To location if necessary.

Bill To - By default, this field will show the assigned Bill To to the selected customer. This can be changed to another Bill To location if necessary.

Ship Via - This field will display the default Ship Via of the selected Ship To. You can select another Ship Via from the combo list box if necessary. If the Ship Via you need is not the in the list, you will have to add it to the Ship Via screen.

Terms - This field will display the default Terms assigned to the selected Customer. You can select other Terms from the combo list box if necessary. Note that the list will show active Terms only. If the Terms you need is not in the list, you will have to add it to the Terms screen.

Ordered By - Use this field to show the order taker. This will default to the username of the user currently logged in.

PO Number - Enter in this field the Customer's Purchase Order number provided to you for this order.

BOL No - Use this field to enter the bill of lading for the freight services.

Template - Select the quote template from the list. If the template you needed is not in the list, you will have to add it to the Quote Template screen.

Quote No - This field is blank by default. A unique and system generated ID will fill in this field upon saving the new quote. This ID is configured on Starting Numbers screen.

Status - Select a new status from the combo list box to show the current status of the order. Your choices are Pending, Expired, Lost, and Won. A new sales order will have a Pending status by default.

- **Pending** - This is the current status when an initial Quote is created.
- **Expired** - Expired status signifies a quote that is no longer valid, but was neither accepted or rejected in the time frame allotted.
- **Lost** - Lost status signifies the deal was lost to another option.
- **Won** - Won status signifies the deal is closed and the quote/purchase agreement has been signed and received by customer

Currency - This field is used to assign a default currency for each Credit Memo. Upon opening the screen, the Currency value is from **Company Configuration | System Manager | Functional Currency**. Once a customer is selected, this field will get the default currency assigned to the customer. You can still override the Currency if necessary. If the currency you need is not in the list you, will have to add it to the Currency screen.

Split - This will define how the order amount will be split between the customers define in the Entity Split. You can select the appropriate split number from the list.

Comments - Use this field to enter additional information about the sales order.

Grid Details:

Item No - Click the combo box button and select the correct item from the list. The combo list box will display the items available on the selected Location only. Some of the fields, like Description, UOM, and Price, are auto-populated with the details in the item record.

Description - This field will display the description of the selected item. You can edit the description if necessary.

UOM (Unit of Measure) - The field will display the default issue UOM of the Item Location. You can select a new UOM if necessary. If the UOM you are looking for is not in the list, you will have to add it to the list of UOMs for that Item.

Ordered - This will default to 1.00. Enter the correct ordered quantity.

Discount - This will display 0.00 by default. Enter the discount percentage you want to give the customer on the selected item. If you want to give the customer a 5% discount when purchasing a particular item enter 5 in this field.

Tax - This is computed based on the taxing setup of the item and customer. Field is also read-only.

Price - This will display the default Sale Price of the selected Item. You can update this if necessary.

Total - This is computed based on the value in Ordered, Discount, and Price field.

Tax Group - Click the combo box button and select the Tax Group applicable for the item.

Comments - Enter any additional information about the particular line item.

Footer Details:

Bill To - This disabled field will display the complete address of the bill to assigned to the Credit Memo.

Ship To - This disabled field will display the complete address of the ship to assigned to the Credit Memo.

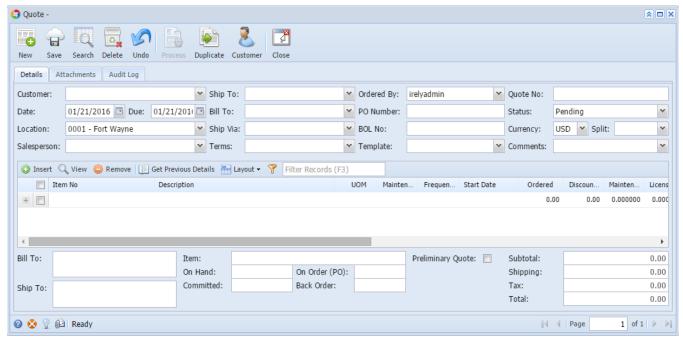**Item Information** - These disabled fields will display the stock details of the selected item.

- **Item** - will display the Item Number and Description of the selected item in the grid.
- **On Hand** - displays the total on hand quantity. This field changes every time an item is sold or purchased.
- **Committed** - displays the total quantity of the selected inventory item that has been ordered but not yet invoiced/shipped.
- **On Order (PO)** - displays the total quantity on order. This field changed every time a purchase order for the selected inventory item is created.

Back Order - displays the total quantity on back order. This field changes every time an invoice for the selected inventory item is posted where there are not enough stock to complete the order (Shipped qty is less than Ordered qty).
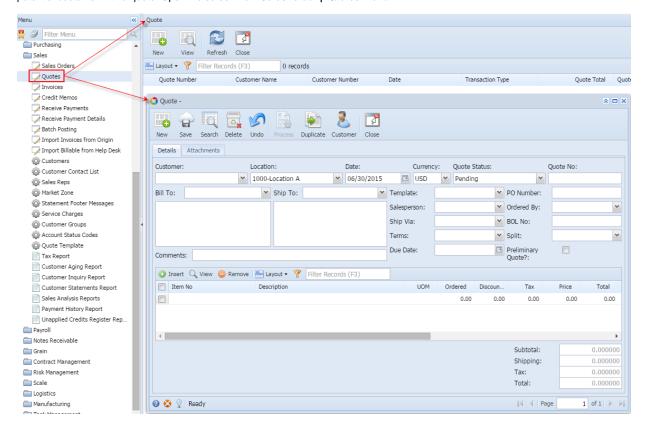
Preliminary Quote - If checked, this will allow a quote to be created without any contact information being entered. This allows user to create a quote without any names tied to the quote. This is great for preliminary or budgetary quotes.

Amount Information

- **Subtotal** - This field will display the total of all the line items entered in the grid.
- **Shipping -** This field will display the shipping cost of the transaction.
- **Tax** - This field will display the total tax of all the line items.
- **Total** - This field will display the total of the transaction which the customer owes you. This is the summation of Subtotal, Shipping, and Tax.

The Quote screen allows you to create, edit, and view information on a potential sale for a customer. This screen is used to provide your customer or potential customer with a quote. Open the screen from **Sales folder | Quotes menu**.

Field Description

Header Details:

Customer - Select a **Customer** from the combo list box. Some of the fields, like **Bill To**, **Ship To**, **Salesperson**, **Ship Via**,**Terms**, and **Due Date**, are filled in with data based on the selected Customer.

Location - By default, this will show the default location assigned to a user. You can select another location if necessary. Note that the list shows the **active Company Location** records only. If the Location you need is not in the list, you will have to add it to the Company Locations screen.

Date - This will default to the current system sate. This can be changed to whatever date the customer placed the order.

Currency - This field is used to assign a default currency for each Invoice. This will default to the set Currency on **Company Preferences**. You can still override the Currency if necessary. If the currency you need is not in the list you, will have to add it to the Currency screen.

Quote Status - Select a new status from the combo list box to show the current status of the order. Your choices are Pending, Expired, Lost, and Won. A new sales order will have a Pending status by default.

- ○ **Pending** - This is the current status when an initial Quote is created.
- ○ **Expired** - Expired status signifies a quote that is no longer valid, but was neither accepted or rejected in the time frame allotted.
- ○ **Lost** - Lost status signifies the deal was lost to another option.
- ○ **Won** - Won status signifies the deal is closed and the quote/purchase agreement has been signed and received by customer

Quote No - This field is blank by default. A unique and system generated ID will fill in this field upon saving the new quote. This ID is configured on Starting Numbers screen.

Bill To - By default, this field will show the assigned Bill To to the selected customer. This can be changed to another Bill To location if necessary. The box below this field is read-only and will show the complete address of the selected Bill To.

Ship To - By default, this field will show the assigned Ship To to the selected customer. This can be changed to another Ship To location if necessary. The box below this field is read-only and will show the complete address of the selected Ship To.

Template - Select the quote template from the list. If the template you needed is not in the list, you will have to add it to the Quote Template screen.

PO Number - Enter in this field the Customer's Purchase Order number provided to you for this order.

Salesperson - This field will display the default Salesperson of the selected customer. You can select another Salesperson from the combo list if necessary. If the Salesperson is not in the list, you will have to add it to the Salesperson screen.

Ordered By - Use this field to show the order taker.

Ship Via - This field will display the default Ship Via of the selected customer. You can select another Ship Via from the combo list box if necessary. If the Ship Via you need is not the in the list, you will have to add it to the Ship Via screen.

BOL No - Use this field to enter the bill of landing for the freight services.

Terms - This field will display the default Terms of the selected Customer. You can select another Terms from the combo list box if necessary. If the Terms you need is not in the list, you will have to add it to the Terms screen.

Split - This will define how the order amount will be split between the customers define in the Customer Split. You can select the appropriate split number from the list. To add new customer splits, refer to How to Add Customer Split. *Business rule not yet implemented.*

Comments *- Use this field to enter additional information about the sales order.*

Due Date - This is a computed date based on the Terms used.

Preliminary Quote - If checked, this will allow a quote to be created without any contact information being entered. This allows user to create a quote without any names tied to the quote. This is great for preliminary or budgetary quotes.

Grid Details:

Item No - Click the combo box button and select the correct item from the list. The combo list box will display the items available on the selected Location only.

Description - This field will display the description of the selected item.

UOM (Unit of Measure) - The field will display the default issue UOM of the Item Location. You can select a new UOM if necessary. If the UOM you are looking for is not in the list, you will have to add it to the list of UOMs for that Item.

Ordered - Enter the correct ordered quantity.

Discount - This will display 0.00 by default. Enter the discount percentage you want to give the customer on the selected item. If you want to give the customer a 5% discount when purchasing a particular item enter 5 in this field.

Tax - This is computed based on the taxing setup of the item and customer.

Price - This will display the default Sale Price of the selected Item. You can update this if necessary.

Total - This is computed based on the value in Ordered, Discount, and Price field.

Bottom fields:

Subtotal - This field will display the total of all the line items entered in the grid.

Shipping - *not yet implemented.*

Tax - This field will display the total tax of all the line items.

Total - This field will display the total of the transaction which the customer owes you. This is the summation of Subtotal, Shipping, and Tax.