

How to Create Standard Quote

Below are the steps in creating a Quote.

1. Open the **Sales | Sales Order** menu. If there is no existing record yet, this will open a new Sales Order screen.
2. If there are existing records, click the **New** button on the integrated search grid to open a new Sales Order screen. You will notice that some of the fields, like the **Date**, **Due**, **Location**, **Ordered By**, **Status**, and **Currency**, are already populated by default. You can still change these if necessary.
3. Check the **Quote** checkbox button.
4. Enter the header details.
 - a. Fill out the the **Customer**, **Date**, **Location**, **Bill To**, **Ship To**, **Terms**, and **Currency**. These are the required header details.
 - b. Fill out other header details if needed. Refer to [Quote | Field Description | Header Details](#) to help you in filling out the fields.
5. Add details on grid. Refer to [Quote | Field Description | Grid Details](#) to help you in filling out the fields. Note that UOM is a required detail.

+ Insert Q Open X Remove Add Recipe Get Previous Details Layout <input type="text" value="Filter Records (F3)"/>												
<input type="checkbox"/>	Item No	Description	UOM	Ordered	Discount	Tax	Price	Total	Tax Group			
	87G	87 Unleaded Gasoline	Gallon	1.00	0.00%	0.00	1.850000	1.85				
				0.00	0.00%	0.00	0.000000	0.00				

The grid will also allow you to enter miscellaneous items that do not have an Inventory Item record. You can do this by not selecting an Item No and simply entering its Description, Ordered, Price, and other necessary details.

+ Insert Q Open X Remove Add Recipe Get Previous Details Layout Filter Records (F3)													
<input type="checkbox"/>	Item No	Description	UOM	Ordered	Discount	Tax	Price	Total	Tax Group				
<input type="checkbox"/>	87G	87 Unleaded Gasoline	Gallon	1.00	0.00%	0.00	1.850000	1.85					
<input type="checkbox"/>		sample misc item		1.00	0.00%	0.00	10.500000	10.50					
<input type="checkbox"/>				0.00	0.00%	0.00	0.000000	0.00					

6. Click **Save** button. Notice that the **Order No** field will be filled in with a unique and system generated number.



You can skip saving the record if the transaction is to be *deduplicated* or *processed to sales order* right away since it will be saved automatically.

Here is a sample Quote record.

Quote - ABC Reseller

New Save Search Delete Undo Print Blend Process Duplicate Recurring Close

Details

Instructions

Attachments (0)

Audit Log (2)

Comments (0)

Approval (0)

Type: Standard

Customer: ABC Reseller

Date: 6/30/2016

Due Date: 7/30/2016

Location: 0001 - Fort Wayne

Bill To: ABC Reseller
Somewhere St.
Indianapolis, IN, 46204 United States

Ship To: ABC Reseller
Somewhere St.
Indianapolis, IN, 46204 United States

Item: On Hand: On Order (PO): Committed: Back Order:

PO Number: Order No: QU-48

BOL No: Split:

Ordered By: irelyadmin

Ship Via: UPS

Status: Pending

Template

Salesperson: Jared Smith

Currency: USD

Terms: 5% 5, Net 30

Expiration:

Comments: sample Standard Quote

+

Insert

Q

Open

X

Remove

+

Add Recipe

+

Get Previous Details

Layout

Q

Filter Records (F3)

<input type="checkbox"/>	Item No	Description	UOM	Ordered	Discount	Tax	Price	Total	Tax Group
<input checked="" type="checkbox"/>	87G	87 Unleaded Ga...	Gallon	1.00	10.00%	0.23	1.850000	1.66	IN SST
<input checked="" type="checkbox"/>		sample misc item		1.00	0.00%	0.00	10.500000	10.50	
<input type="checkbox"/>				0.00	0.00%	0.00	0.000000	0.00	

Quote: ☒ Subtotal: 12.16

Quote: ☐ Preliminary

☐ Price Only

☒ Price and Quantity

☐ Shipping: 0.00

☐ Tax: 0.23

☐ Total: 12.39

Ready

Page 1 of 1

1. Open the **Sales | Sales Order** menu. If there is no existing record yet, this will open a new Sales Order screen.
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3. Check the **Quote** checkbox button.
4. Enter the header details as needed. Refer to [Quote | Field Description | Header Details](#) to help you in filling out the fields. Note that the required details are Customer, Location, Ship To, Bill To, Terms, and Currency.
5. Add details on grid. Refer to [Quote | Field Description | Grid Details](#) to help you in filling out the fields. Note that UOM is a required detail. Complete filling in the Item No, UOM, Ordered, Discount, Price, Tax Group, and other fields necessary to ensure they are appropriate for the customer's order.

+ Insert Q Open X Remove Add Recipe Get Previous Details Layout Filter Records (F3)									
<input type="checkbox"/>	Item No	Description	UOM	Ordered	Discount	Tax	Price	Total	Tax Group
	<input checked="" type="checkbox"/> 87G	87 Unleaded Gasoline	Gallon	1.00	0.00%	0.00	1.850000	1.85	
	<input type="checkbox"/>			0.00	0.00%	0.00	0.000000	0.00	

The grid will also allow you to enter miscellaneous items that do not have an Inventory Item record. You can do this by not selecting an Item No and simply entering its Description, Ordered, Price, and other necessary details.

+ Insert											Open	Remove	Add Recipe	Get Previous Details	Layout	Filter Records (F3)				
	<input type="checkbox"/>	Item No	Description	UOM	Ordered	Discount	Tax	Price	Total	Tax Group										
	<input checked="" type="checkbox"/>	87G	87 Unleaded Gasoline	Gallon	1.00	0.00%	0.00	1.850000	1.85											
	<input checked="" type="checkbox"/>		sample misc item		1.00	0.00%	0.00	10.500000	10.50											
	<input type="checkbox"/>				0.00	0.00%	0.00	0.000000	0.00											

- Click **Save** button. Notice that the **Quote No** field will be filled in with a unique and system generated number.



You can skip saving the record if the transaction is to be **duplicated** or **processed to sales order** right away since it will be saved automatically.

Here is a sample Quote record.

Quote - ABC Reseller

New Save Search Delete Undo Print Process Duplicate Customer Close

Details

Instructions

Attachments (0)

Audit Log (1)

Comments (0)

Type: Standard

Bill To: ABC Reseller

Ordered By: irelyadmin

Order No: QU-23

Customer: ABC Reseller

Ship To: ABC Reseller

PO Number:

Salesperson: Jared Sr

Status: Pending

Date: 04/18/2016

Due: 05/18/2016

Ship Via: UPS

BOL No:

Split:

Currency: USD

Location: 0001 - Fort Wayne

Terms: 5% 5, Net 30

Template

Comments: Sample Quote, DUP: QU-21

+	Insert	Q	Open	X	Remove	+	Add Recipe	+	Get Previous Details	+	Layout	Q	Filter Records (F3)
<input type="checkbox"/>	Item No	Description	UOM	Ordered	Discount	Tax	Price	Total	Tax Group				
<input checked="" type="checkbox"/>	87G	87 Unleaded Gasoline	Gallon	1.00	0.00%	0.00	1.850000	1.85					
<input checked="" type="checkbox"/>		sample misc item		1.00	0.00%	0.00	10.500000	10.50					
<input type="checkbox"/>				0.00	0.00%	0.00	0.000000	0.00					

Bill To: ABC Reseller
Somewhere St.
Indianapolis, IN, 46204

Item: D2D - #2 Dyed Diesel

Quote: ☒

Subtotal: 12.35

Ship To: ABC Reseller
Somewhere St.
Indianapolis, IN, 46204

On Hand: 4,995.00

On Order (PO): 5.00

Preliminary Quote: ☐

Shipping: 0.00

Committed: 0.00

Back Order: 0.00

Tax: 0.00

Total: 12.35

Ready

Page 1 of 1

- Open the **Sales | Quotes** menu. If there is no existing record yet, this will open a new Quote screen.
- On the integrated search grid, click the **New** button to open a new Quote screen. You will notice that some of the fields, like the **Date**, **Due**, **Location**, **Ordered By**, **Status**, and **Currency**, are already populated by default.

irely

IRELY ADMIN

Collapse All Menus

Home

Filter...

Sales

Quotes

Sales Orders

Invoices

i21 Demo Setup Company(Source)

Quote

New Open Refresh Export Close

Layout Q Filter Records (F3) 4 records

Quote Number	Customer Name	Customer Number	Date
<input type="checkbox"/> QU-3	ABC Reseller	0001005069	01/20/2016
<input type="checkbox"/> QU-2	ABC Reseller	0001005069	01/20/2016
<input type="checkbox"/> QU-1	Archer Daniels Midland	0001005008	10/27/2015

- Enter the header details as needed. Refer to **Quote | Field Description | Header Details** to help you in filling out the fields. Note that the required details are Customer, Location, Ship To, Bill To, Terms, and Currency.
- Add details on grid. Refer to **Quote | Field Description | Grid Details** to help you in filling out the fields. Note that UOM is a required detail. Complete filling in the Item No, UOM, Ordered, Discount, Price, Tax Group, and other fields necessary to ensure they are appropriate for the customer's order.

+ Insert 🔍 Open ✕ Remove 📄 Add Recipe 📄 Get Previous Details 🗪 Layout 🔍 Filter Records (F3)										
<input type="checkbox"/>	Item No	Description	UOM	Ordered	Discou..	Tax	Price	Total	Tax Gro..	Comment
<input checked="" type="checkbox"/>	87G	87 Unleaded Gasoline	Gallon	100.00	0.00%	14.80	1.850000	185.00	IN SST	
<input type="checkbox"/>				0.00	0.00%	0.00	0.000000	0.00		

The grid will also allow you to enter miscellaneous items that do not have an Inventory Item record. You can do this by not selecting an Item No and simply entering its Description, Ordered, Price, and other necessary details.

and simply entering its Description, Grade, Price, and other necessary details.

+ Insert X Open X Remove Add Recipe Get Previous Details Layout Filter Records (F3)										
<input type="checkbox"/>	Item No	Description	UOM	Ordered	Discou...	Tax	Price	Total	Tax Gro...	Comment
<input checked="" type="checkbox"/>	87G	87 Unleaded Gasoline	Gallon	100.00	0.00%	14.80	1.850000	185.00	IN SST	
<input checked="" type="checkbox"/>		sample misc item		1.00	0.00%	0.00	10.500000	10.50		
<input type="checkbox"/>				0.00	0.00%	0.00	0.000000	0.00		

- Click **Save** button. Notice that the **Quote No** field will be filled in with a unique and system generated number.



You can skip saving the record if the transaction is to be **deduplicated** or **processed to sales order** right away since it will be saved automatically.

Here is a sample Quote record.

Quote - ABC Reseller

New Save Search Delete Undo Process Duplicate Customer Close

Details Attachments (0) Audit Log (2) Comments (0)

Customer: ABC Reseller Ship To: ABC Reseller Ordered By: irelyadmin Quote No: QU-4

Date: 01/21/2016 Due: 01/26/2016 Bill To: ABC Reseller PO Number: Status: Pending

Location: 0001 - Fort Wayne Ship Via: Truck BOL No: Currency: USD Split:

Salesperson: Mike Moriarty Terms: 5% 5 Net 30 Template: Comments: Sample Quote.

+ Insert View Remove Add Recipe Get Previous Details Layout Filter Records (F3)

Item No	Description	UOM	Ordered	Discou...	Tax	Price	Total	Tax Gro...	Commen
87G	87 Unleaded Gasoline	Gallon	100.00	0.00%	14.80	1.850000	185.00	IN SST	
	sample misc item		1.00	0.00%	0.00	10.500000	10.50		
			0.00	0.00%	0.00	0.000000	0.00		

Bill To: ABC Reseller Somewhere St. Indianapolis, IN 46204 United On Hand: On Order (PO): Preliminary Quote: Subtotal: 195.50

Ship To: ABC Reseller Somewhere St. Indianapolis, IN 46204 United Committed: Back Order: Shipping: 0.00

Tax: 14.80

Total: 210.30

Page 1 of 1

Below are the steps in creating a Quote.

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2. On the integrated search grid, click the **New toolbar button** to open a new Quote screen. You will notice that some of the fields, like the **Date**, **Due**, **Location**, **Ordered By**, **Status**, and **Currency**, are already populated by default.
3. Enter the header details as needed. Refer to **Quote | Field Description | Header Details** to help you in filling out the fields. Note that the required details are Customer, Location, Ship To, Bill To, Terms, and Currency.
4. Add details on grid. Refer to **Quote | Field Description | Grid Details** to help you in filling out the fields. Note that UOM is a required detail. Complete filling in the Item No, UOM, Ordered, Discount, Price, and other fields necessary to ensure they are appropriate for the customer's order.

Insert View Remove Add Recipe Get Previous Details Layout Filter Records (F3)

Item No	Description	UOM	Ordered	Discoun...	Mainten...	License ...	Tax	Price	Total	Comments
87G	87 Unleaded Gasoline	Gallon	10.00	0.00	0.000000	0.000000	1.30	1.850000	18.50	
			0.00	0.00	0.000000	0.000000	0.00	0.000000	0.00	

The grid will also allow you to enter miscellaneous items that do not have an Inventory Item record. You can do this by not selecting an Item No and simply entering its Description, Ordered, Price, and other necessary details.

Insert View Remove Add Recipe Get Previous Details Layout Filter Records (F3)

Item No	Description	UOM	Ordered	Discoun...	Mainten...	License ...	Tax	Price	Total	Comments
87G	87 Unleaded Gasoline	Gallon	10.00	0.00	0.000000	0.000000	1.30	1.850000	18.50	
	sample misc item		5.00	0.00	0.000000	0.000000	0.00	3.160000	15.80	
			0.00	0.00	0.000000	0.000000	0.00	0.000000	0.00	

5. Click **Save button**. Notice that the **Quote No** field will be filled in with a unique and system generated number.



You can skip saving the record if the transaction is to be **deduplicated** or **processed to sales order** right away since it will be saved automatically.

Here is a sample Quote record.

Quote - ABC Reseller

New Save Search Delete Undo Process Duplicate Customer Close

Details Attachments Audit Log

Customer: 0001005066 Ship To: ABC Reseller Ordered By: irelyadmin Quote No: QU-5

Date: 01/21/2016 Due: 01/21/2016 Bill To: ABC Reseller PO Number: PO#04 Status: Pending

Location: 0001 - Fort Wayne Ship Via: Truck BOL No: BOL#04 Currency: USD Split:

Salesperson: 0001005049 Terms: Due on Receipt Template: Comments: Sample quote.

+ Insert View Remove Add Recipe Get Previous Details Layout Filter Records (F3)

Item No	Description	UOM	Ordered	Discoun...	Mainten...	License ...	Tax	Price	Total	Comments
87G	87 Unleaded Gasoline	Gallon	10.00	0.00	0.000000	0.000000	1.30	1.850000	18.50	
	sample misc item		5.00	0.00	0.000000	0.000000	0.00	3.160000	15.80	
			0.00	0.00	0.000000	0.000000	0.00	0.000000	0.00	

Bill To: ABC Reseller Somewhere St. Fortville, IN 46040 United States On Hand: On Order (PO): Preliminary Quote: Subtotal: 34.30

Ship To: ABC Reseller Somewhere St. Fortville, IN 46040 United States Committed: Back Order: Shipping: 0.00

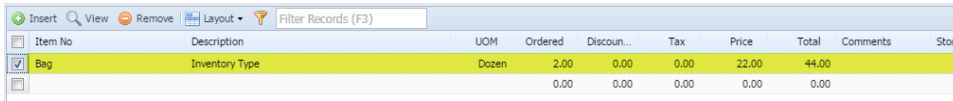
Tax: 1.30

Total: 35.60

Page 1 of 1

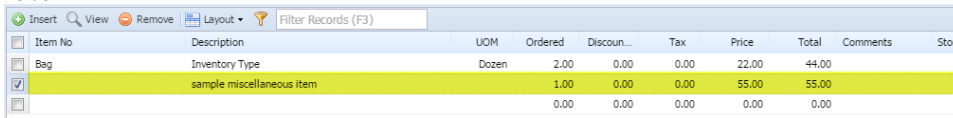
Below are the steps in creating a Quote.

1. Open the **Sales | Quotes** menu. If there is no existing record yet, this will open a new Quote screen.
2. On the grid search, click the **New toolbar button** to open a new Quote screen. You will notice that some of the fields, like the **Location, Date, Currency, and Order Status**, are already populated by default.
3. Enter the header details as needed. Refer to [Quote | Field Description | Header Details](#) to help you in filling out the fields.
4. Enter the grid details as needed. Complete filling in the Item No, Ordered, Discount, and other fields necessary to ensure they are appropriate for the customer's order.



Item No	Description	UOM	Ordered	Discoun...	Tax	Price	Total	Comments	Stor
Bag	Inventory Type	Dozen	2.00	0.00	0.00	22.00	44.00		
			0.00	0.00	0.00	0.00	0.00		

The grid will also allow you to enter miscellaneous items that do not have an Inventory Item record. You can do this by not selecting an Item No and simply entering its Description, Ordered, Discount, and Price. Refer to [Quote | Field Description | Grid Details](#) to help you in filling out the fields.



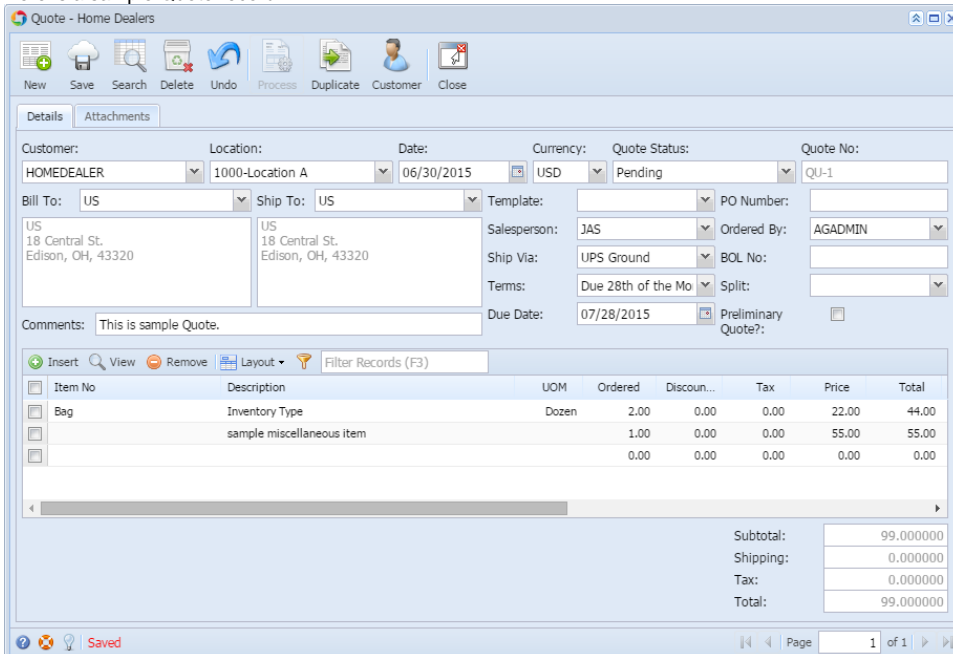
Item No	Description	UOM	Ordered	Discoun...	Tax	Price	Total	Comments	Stor
Bag	Inventory Type	Dozen	2.00	0.00	0.00	22.00	44.00		
	sample miscellaneous item		1.00	0.00	0.00	55.00	55.00		
			0.00	0.00	0.00	0.00	0.00		

5. Click **Save** button. Notice that the **Quote No** field will be filled in with a unique and a system generated number. The **Customer, Location, Bill To, Ship To, and Terms** are the required details in saving a Sales Order.



You can skip saving the record if the transaction is to be [duplicated](#) or [processed to sales order](#) right away since it will be saved automatically.

Here is a sample Quote record.



Quote - Home Dealers

Details | Attachments

Customer: HOMEDEALER | Location: 1000-Location A | Date: 06/30/2015 | Currency: USD | Quote Status: Pending | Quote No: QU-1

Bill To: US | Ship To: US | Template: | PO Number: |

US 18 Central St. Edison, OH, 43320 | US 18 Central St. Edison, OH, 43320 | Salesperson: JAS | Ordered By: AGADMIN

Ship Via: UPS Ground | BOL No: |

Terms: Due 28th of the Mo | Split: |

Due Date: 07/28/2015 | Preliminary Quote?: ☐

Comments: This is sample Quote.

Item No	Description	UOM	Ordered	Discoun...	Tax	Price	Total
Bag	Inventory Type	Dozen	2.00	0.00	0.00	22.00	44.00
	sample miscellaneous item		1.00	0.00	0.00	55.00	55.00
			0.00	0.00	0.00	0.00	0.00

Subtotal: 99.000000
Shipping: 0.000000
Tax: 0.000000
Total: 99.000000

Page 1 of 1