


How to Create a 'Price Only' Quote

The **Price Only** option will allow the user to create a quote without the need to provide a definite quantity.

- 1. Open the **Sales | Sales Orders** menu, and click **New** button on the integrated search grid to open a new screen.
- 2. Check the **Quote checkbox** button.
- 3. Enter the header details.
 - a. Fill out 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.
- 4. Tick the **Price Only radio button**. Notice that the **UOM** and **Ordered** columns on the grid are hidden.
- 5. Add details on grid. Refer to [Quote | Field Description | Grid Details](#) to help you in filling out the fields.

 The Item No field will not display items with no default sales UOM because the system will need it when processing the quote to sales order. By default, the system will also set the Ordered quantity to 1 when quote is promoted to Sales Order.

- 6. Save the record.
- Here is a sample Price Only quote.

Quote - ABC Reseller

New Save Search Delete Undo Print Blend Process Duplicate Recurring Close

DetailsInstructionsAttachments (0)Audit Log (1)Comments (0)Approval (0)

Type:StandardBill To:ABC ResellerPO Number:Order No:QU-53

Customer:ABC ResellerShip To:ABC ResellerBOL No:Split:

Date:6/30/2016Ordered By:irelyadminStatus:PendingSalesperson:Jared Smith

Due Date:7/30/2016Ship Via:UPSTemplateCurrency:USD

Location:0001 - Fort WayneTerms:5% 5, Net 30Expiration:Comments:Price Only

+ InsertQ OpenX RemoveAdd RecipeGet Previous DetailsLayoutFilter Records (F3)

Item No	Description	Discount	Tax	Price	Total	Tax Group
<input type="checkbox"/> 87G	87 Unleaded Gasoline	0.00%	0.23	1.850000	1.85	IN SST
<input type="checkbox"/>	misc item	0.00%	0.00	10.000000	10.00	
<input type="checkbox"/>		0.00%	0.00	0.000000	0.00	

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:
Committed:


On Order (PO):
Back Order:

Quote:
Preliminary Quote:
☒ Price Only
☐ Price and Quantity

☒ Subtotal:11.85
☐ Shipping:0.00
Tax:0.23
Total:12.08

Ready

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 The quote report of a Price Only quote will not display the UOM and Ordered columns.