How to Create Software Type Quote

Software type Quote is used if the transaction will contain software item type. Setting the quote Type to Software will display the software type related columns on grid area.

1. **Maintenance Type** - Use this field to set the type of maintenance applicable for the item. Options are License Only, Maintenance Only, License /Maintenance, and SaaS.
   a. **Licence Only** - This will create only the License Invoice when SO is processed to Invoice.
   b. **Maintenance Only** - This will create only the Recurring Transaction when SO is processed to Invoice.
   c. **License/Maintenance** - This will create both the License Invoice and Recurring Transaction when SO is processed to Invoice.
   d. **SaaS** - Will function like Maintenance Only.
2. **Frequency** - Use this field to define the frequency of the recurring transaction. This can also be used to set the Accrual of the Invoice.
3. **Start Date** - Use this field to set the start date of the recurring transaction.
4. **Maintenance Amount** - This will depend on the item setup (Item | Setup tab | Sales tab | Maintenance Calculation Method, and Rate field)
5. **License Amount** - This will default to the item price.

Below are the steps in creating a software type 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. Set the **Type** to **Software**.
5. Enter the header details.
   a. Select a **Customer**.
   b. Change the default value of **Date**, **Location**, **Bill To**, **Ship To**, **Terms**, and **Currency**. Don't leave these blank since these are the required header details.
   c. Fill out other header details if needed. Refer to **Quote | Field Description | Header Details** to help you in filling out the fields.
6. Add details on grid.
   a. Select a software type **Item No**.
   b. Fill out the software related fields defined at the beginning of this topic.
   c. Complete filling in other fields necessary. Refer to **Quote | Field Description | Grid Details** to help you in filling out the fields. **UOM** is a required detail.

7. 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 duplicated or processed to sales order right away since it will be saved automatically.*