

How to Create Preliminary Quote

The **Preliminary Quote** option, if checked, will allow the user to create a quote without any contact information entered.

Here are the steps in creating a preliminary quote.

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. Check the **Preliminary Quote** checkbox button.
4. On header area, enter the **Terms** and **Due Date**.
5. Add details on grid. Refer to [Quote | Field Description | Grid Details](#) to help you in filling out the fields.
6. Save the record.

Here is sample Preliminary Quote.

Quote -

New Save Search Delete Undo Print Blend Process Duplicate Recurring Close

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

Type: Standard Bill To: PO Number: Order No: QU-55

Customer: Ship To: BOL No: Split:

Date: 7/5/2016 Ordered By: irelyadmin Status: Pending Salesperson:

Due Date: 8/31/2016 Ship Via: Template Currency: USD

Location: 0001 - Fort Wayne Terms: End of Next Month Expiration: Comments: Preliminary Quote

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

Item No	Description	UOM	Ordered	Discount	Tax	Price	Total	Tax Group
87G	87 Unleaded Ga...	Gallon	1.00	0.00%	0.00	1.850000	1.85	
	misc item		1.00	0.00%	0.00	100.000000	100.00	
			0.00	0.00%	0.00	0.000000	0.00	

Bill To: Item: On Hand: On Order (PO): Quote: Subtotal: 101.85

Ship To: Committed: Back Order: Preliminary Quote: Shipping: 0.00

Price Only Tax: 0.00

Price and Quantity Total: 101.85

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