

How to create a Quote

Procedure

1. To create a quote, click on the “Sales Ledger” on the side navigation bar under the heading “Accounts”.
2. Select the company from the list.
3. Click on quotes on the bar along the middle.
4. Click on “New Quote”.
5. Start typing the item name in the “Prd Code” box and select the product from the drop down list – this will also fill in the “Description” and the price boxes. If the item is not in the Stock Ledger, you can just type in the information manually.
6. Type in the quantity in the “Qty” box.
7. In the “Nom” box, click on the arrow and select the correct category for the item. For example, is it “New Hardware Mac” or “PC”?
8. To add another product line, click on the red tick on the right hand side and to remove a line, click on the minus icon “-“
9. Check that the price is correct in the “Grand Total” box.
10. Click “Save & Close” when you have entered all of the required information.

SQLWorks 2012 - Customer Quote

Preview Halt Transaction Scan Save & Close Cancel

Invoice Address Delivery Address

Customer Name: 1828 Yeotown Sales Contact: Yeotown

Address 1: Yeotown Address 2: Snapper Address 3: Barnstaple Town: Barnstaple County: Devon Telephone: 01271 343803 Postcode/Countr: EX32 7JY UK

Reference Group: Quote Number: Quote Date: 7 Sep 2015 Your Ref: Our Ref:

Contact Group: Our Sales Person: GEORGEWARD Valid Until: 14 Sep 2015

Value Group: Total Cost: 0.00 Add Exempt NRT VAT: 0.00 GRAND TOTAL: 0.00 Conversion Chan: 50 Conversion Date:

Detail Group: Warehouse: 001 Main Stores Currency: £ Sterling Dept Code: MISC Miscellaneous Exchange R: 1.000000

Prd Code	Description	Actual	Free	Potent	Part No.	Supplier	Nom	Unit Stk Sell	SSM	Price Per	Unit Desc	Qty	Gross Amount	Your Discou	Nett Amount	Code	VAT	Due Date	Our Cost	Total	Net Profit
1	New hardware	0.000000	1.00	1			160	1.000000		1.00		1	0.00	0.00	0.00	6	0.00		0.00	0.00	0.00