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.