

Quote

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Introduction

Following shows a sample window.

The chapter describes features available within the window.

crm-quote-en.png

Create quote

Click "New quote" on upper right corner of quote table

Sales quote New quote

↻ ☰ 10 ▼ Q Enter search keyword

Sales quote	Customer	Input date	Contact	Staff	Items	
200003 ✓	CCIOUS2	11/1/2019	Henry Roosevolt	Someone McGuest	1	👁 ✎
Sales quote	Customer	Input date	Contact	Staff	Items	

1 ~ 1 / 1 ◀ 1 ▶

Enter quote data. Click "+ Add line" if needed. Click "Submit" when done.

New quote



Document

Customer

Date

Payment term

Expiration

Incoterm

Contact

Reference

Staff

Currency

+ Add line

Submit

Update quote

Click "Update" button on right of the quote

Sales quote New quote

10 Q Enter search keyword

Sales quote	Customer	Input date	Contact	Staff	Items	
200003	CCIOUS2	11/1/2019	Henry Roosevelt	Someone McGuest	1	
Sales quote	Customer	Input date	Contact	Staff	Items	

1 ~ 1 / 1 < 1 >

Update quote data, then click "Update"

Click "+ Add line" if needed

Update quote



Document 200005

Customer CCIUS2 (California Customer, Inc.)

Date 3/24/2022

Payment term Advance

Expiration 3/24/2022

Incoterm N/A

Contact Henry Roosevelt

Reference N/A

Staff Eric

Currency USD (U.S. Dollar)

Item A0001

Display A0001

Unit price 9.00

Description Product A

Quantity 1




+ Add line




Update

View quote

Click "View" button on right of the quote

Sales quote New quote

  10  Q Enter search keyword

Sales quote	Customer	Input date	Contact	Staff	Items	
200003 	CCIOUS2	11/1/2019	Henry Roosevelt	Someone McGuest	1	 
Sales quote	Customer	Input date	Contact	Staff	Items	

1 ~ 1 / 1 < 1 >

Quote modal appears

View quote



Document 200003

Customer CCIUS2 (California Customer, Inc.)

Date 11/1/2019

Payment term Advance

Expiration 11/1/2019

Incoterm N/A

Contact Henry Roosevelt

Reference 798671

Staff Someone McGuest

Currency USD (U.S. Dollar)

Item

Display

Unit price

A0001

A0001

13.00

Description

Quantity

Product A

5







View PDF

Approve quote

Click "Approve" button on the right of quote

Sales quote New quote

10 Enter search keyword

Sales quote	Customer	Input date	Contact	Staff	Items	
200005	CCIOUS2	3/24/2022	Henry Roosevelt	Eric	1	  
200003	CCIOUS2	11/1/2019	Henry Roosevelt	Someone McGuest	1	  
Sales quote	Customer	Input date	Contact	Staff	Items	

1 ~ 2 / 2 < 1 >

When quote modal appears, click "Approve" or "Disapprove" button to confirm

Approve quote



Document 200003

Customer CCIUS2 (California Customer, Inc.)

Date 11/1/2019

Payment term Advance

Expiration 11/1/2019

Incoterm N/A

Contact Henry Roosevelt

Reference 798671

Staff Someone McGuest

Currency USD (U.S. Dollar)

Item A0001

Display A0001

Unit price 13.00

Description Product A

Quantity 5

Disapprove

Approve