Quote

- Introduction
- Create quote
- Update quote
- View quote
- Approve quote

Introduction

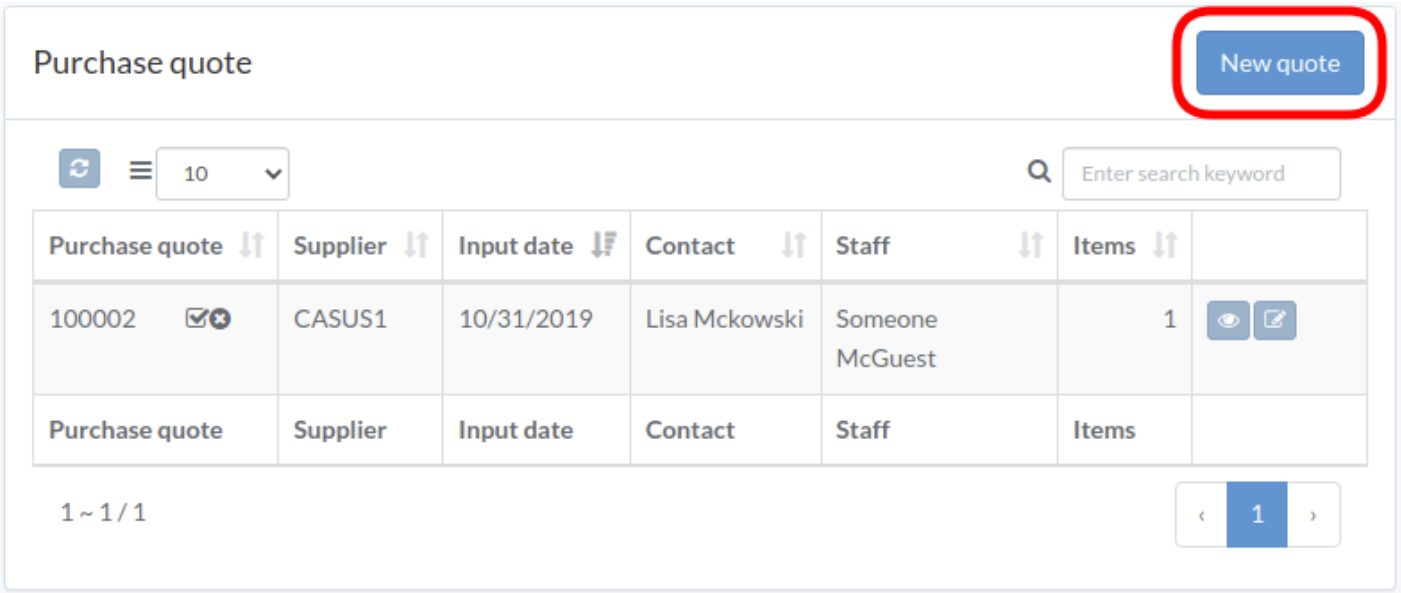
Following shows a sample window.

The chapter describes features available within the window.

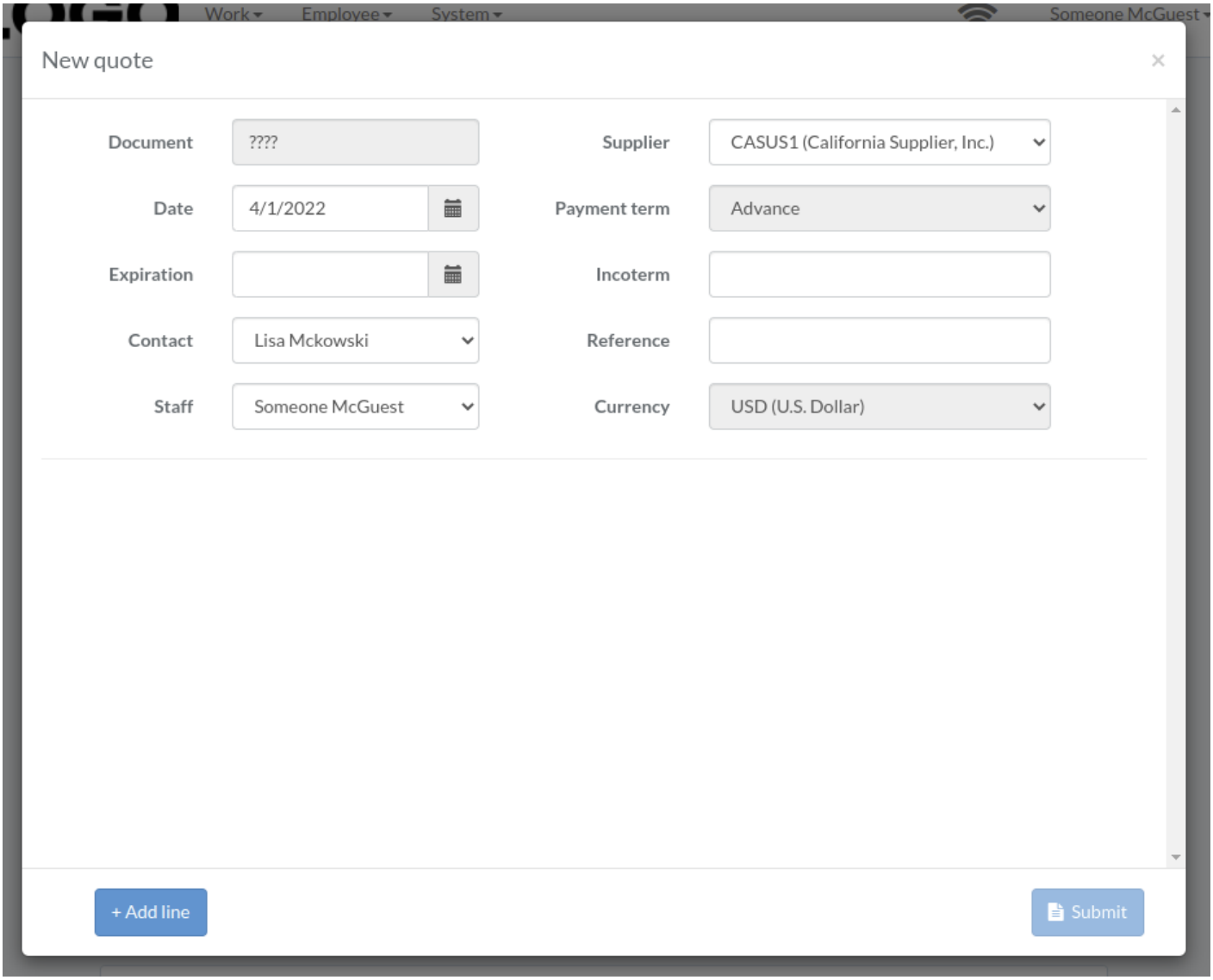
vrm-quote-en.png

Create quote

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

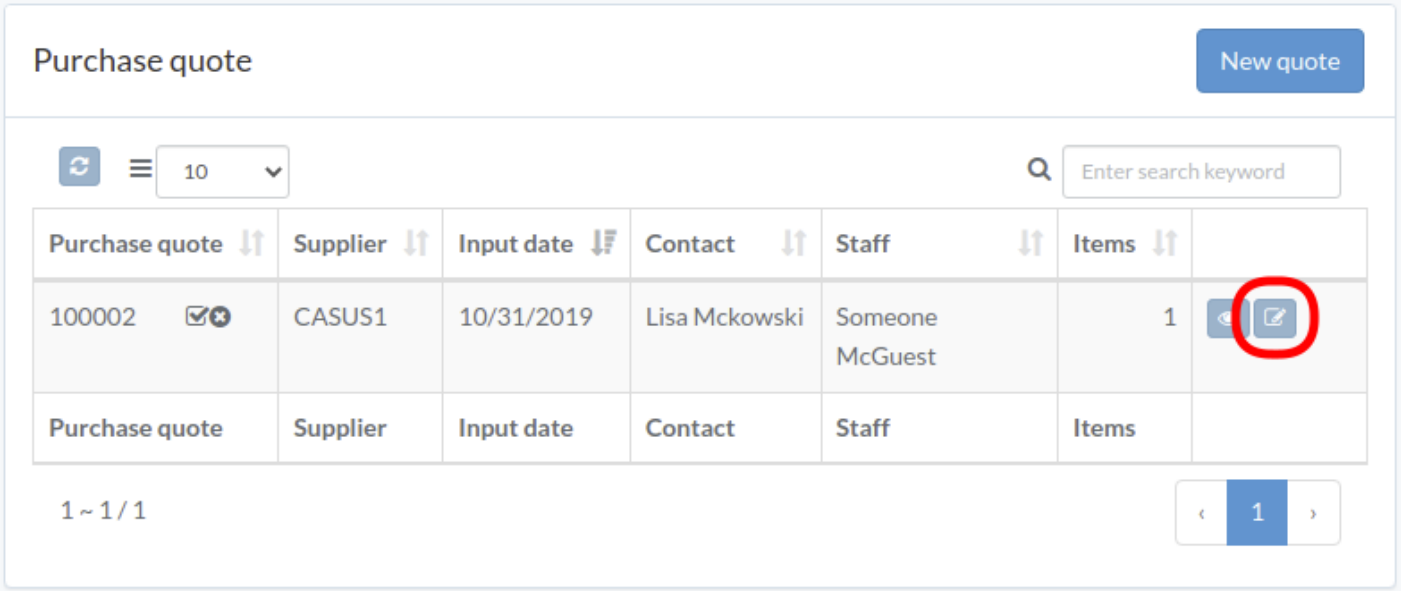


Enter quote data. Click "+ Add line" if needed. Click "Submit" when done.


Work
Employee
System
Someone McGuest
New quote
Document
????
Supplier
CASUS1 (California Supplier, Inc.)
Date
4/1/2022
Payment term
Advance
Expiration
Incoterm
Contact
Lisa Mckowski
Reference
Staff
Someone McGuest
Currency
USD (U.S. Dollar)
+ Add line
Submit

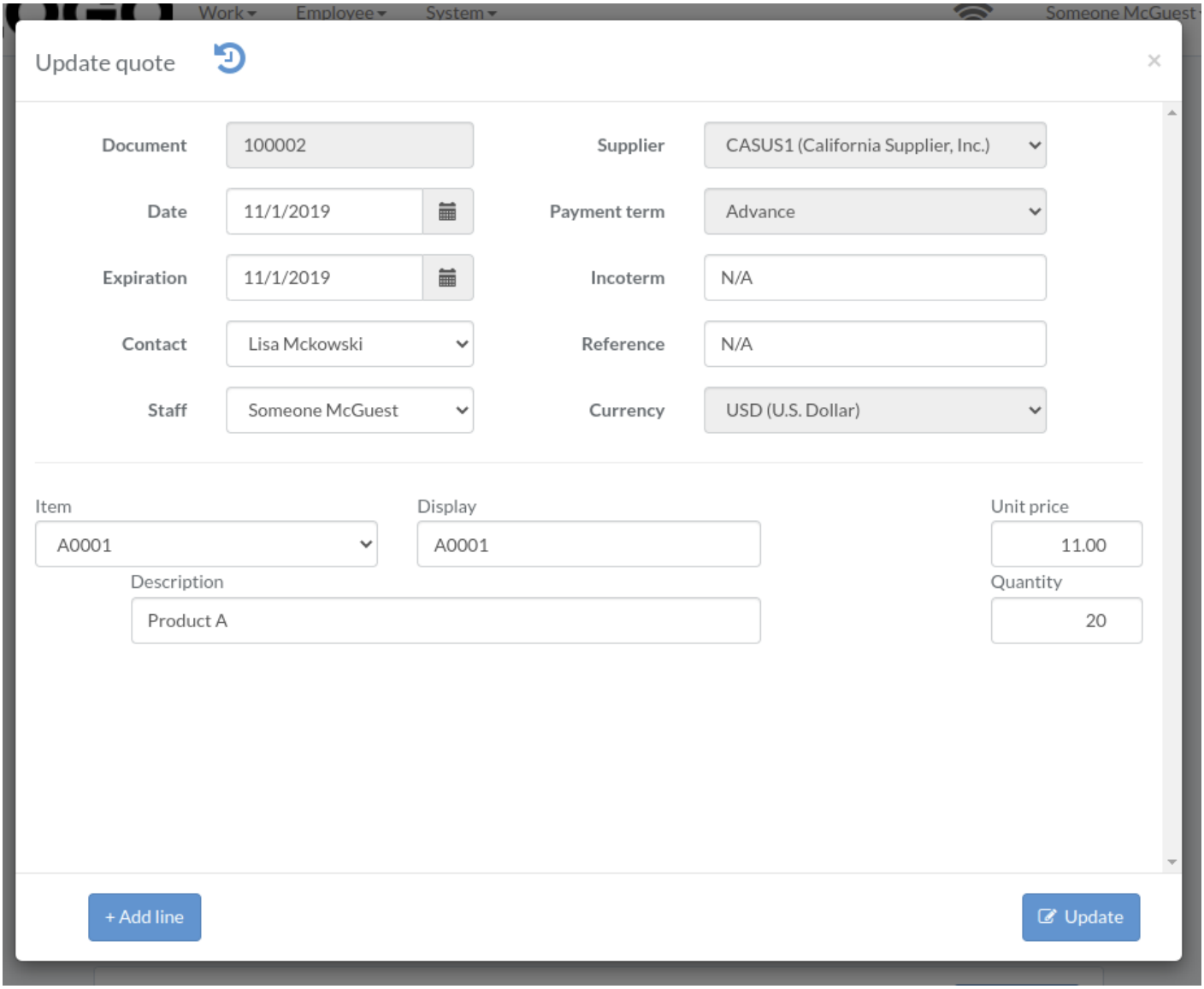
Update quote

Click "Update" button on right of the quote



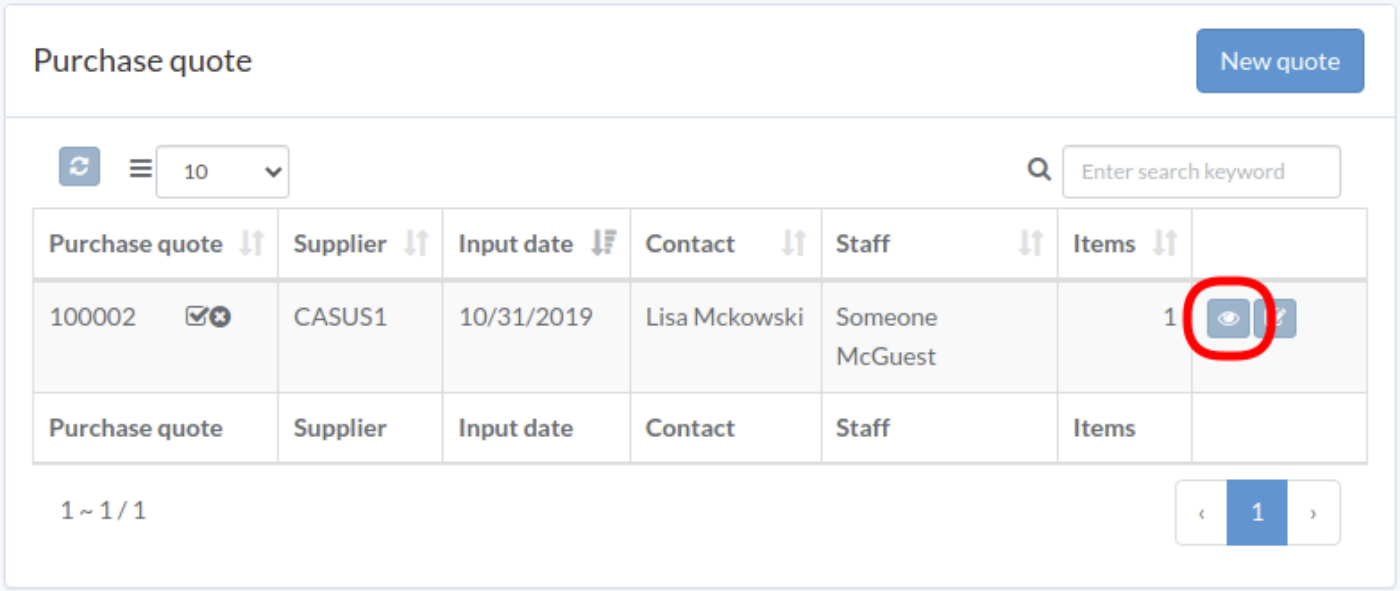
Update quote data, then click "Update"

Click "+ Add line" if needed

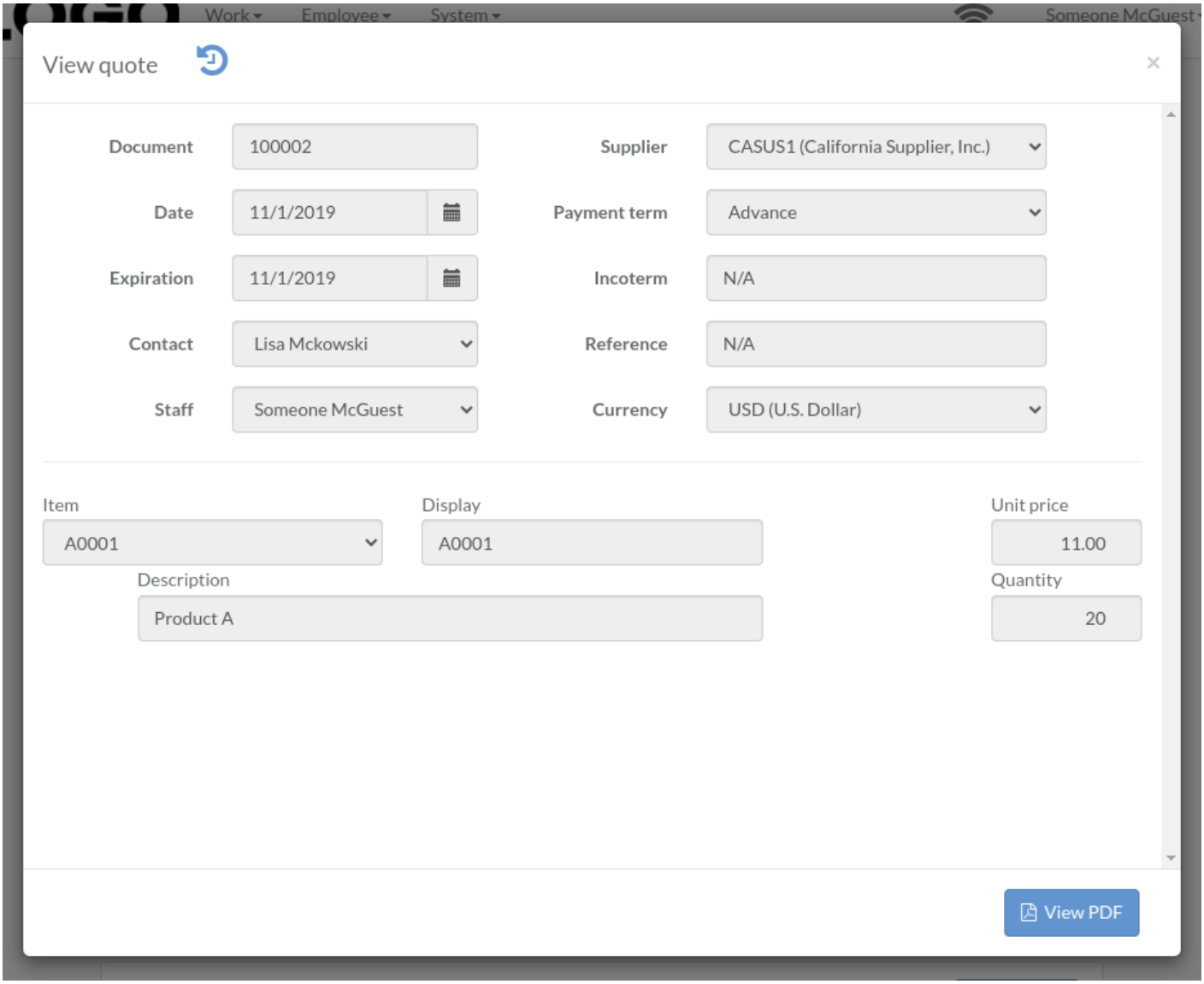

Work
Employee
System
Someone McGuest
Update quote
Document
100002
Supplier
CASUS1 (California Supplier, Inc.)
Date
11/1/2019
Payment term
Advance
Expiration
11/1/2019
Incoterm
N/A
Contact
Lisa Mckowski
Reference
N/A
Staff
Someone McGuest
Currency
USD (U.S. Dollar)
Item
A0001
Display
A0001
Unit price
11.00
Description
Product A
Quantity
20
+ Add line
Update

View quote

Click "View" button on right of the quote

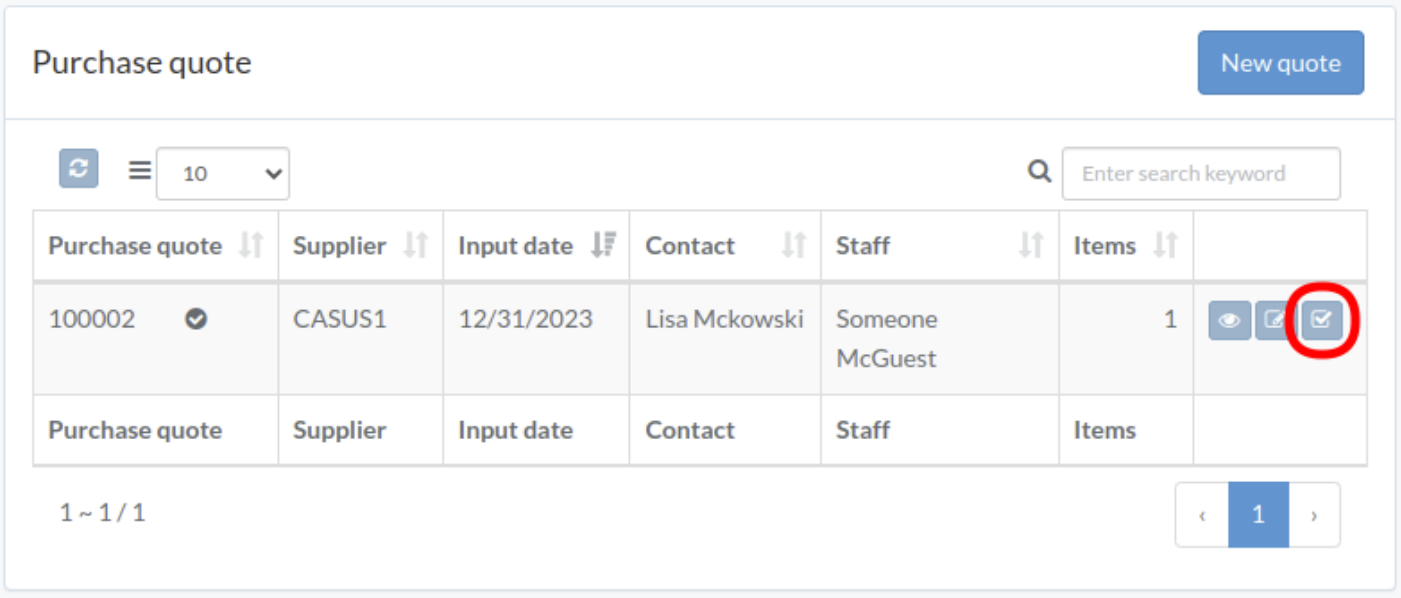


Quote modal appears

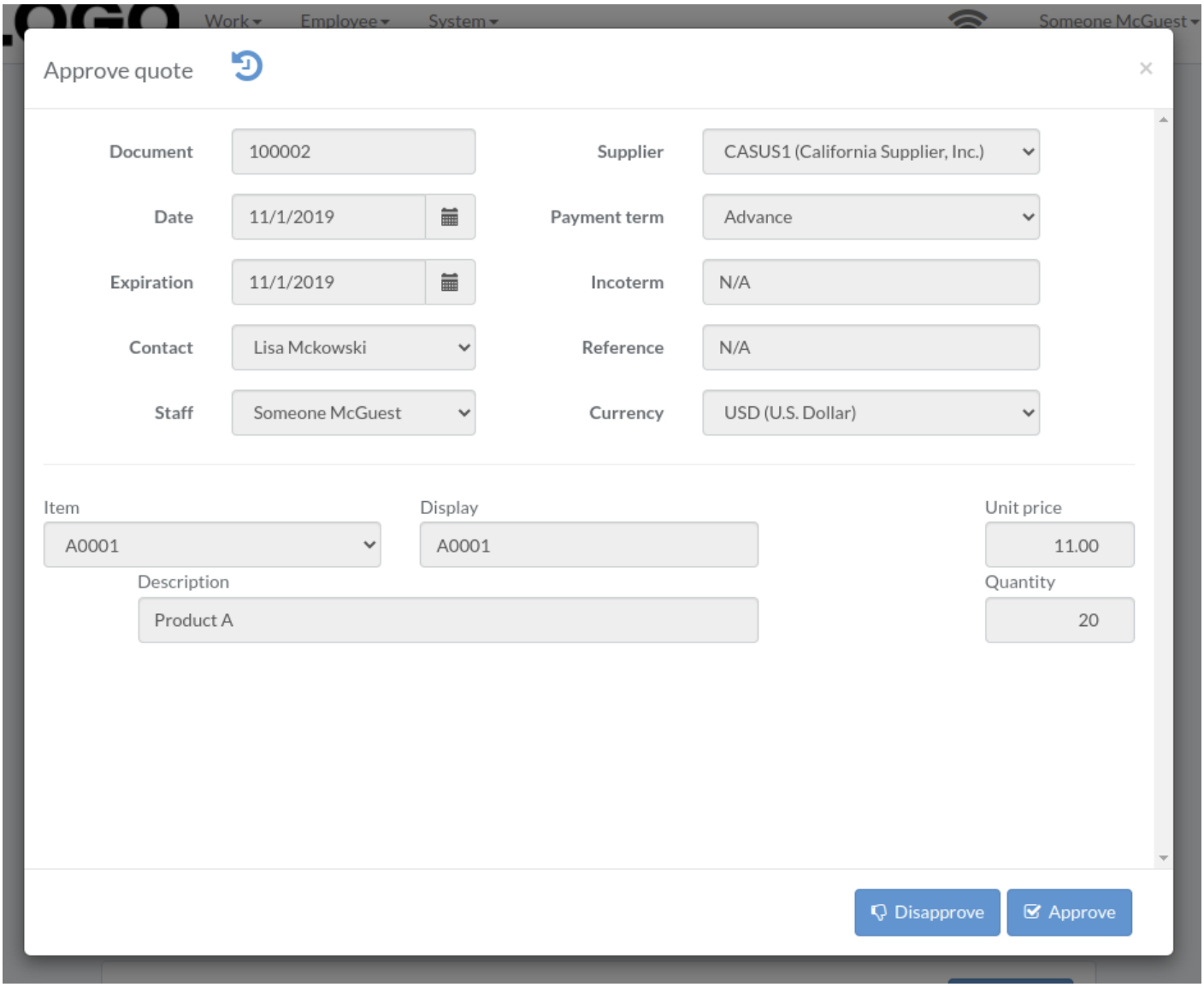

Work
Employee
System
Someone McGuest
View quote
Document
100002
Supplier
CASUS1 (California Supplier, Inc.)
Date
11/1/2019
Payment term
Advance
Expiration
11/1/2019
Incoterm
N/A
Contact
Lisa Mckowski
Reference
N/A
Staff
Someone McGuest
Currency
USD (U.S. Dollar)
Item
A0001
Display
A0001
Unit price
11.00
Description
Product A
Quantity
20
View PDF

Approve quote

Click "Approve" button on the right of quote



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


Work
Employee
System
Someone McGuest
Approve quote
Document
100002
Supplier
CASUS1 (California Supplier, Inc.)
Date
11/1/2019
Payment term
Advance
Expiration
11/1/2019
Incoterm
N/A
Contact
Lisa Mckowski
Reference
N/A
Staff
Someone McGuest
Currency
USD (U.S. Dollar)
Item
A0001
Display
A0001
Unit price
11.00
Description
Product A
Quantity
20
Disapprove
Approve