

Quotation Search

Video training manual 2016 - [Click Here](#)

Debtors Module> Activity> Quotation

Basic Search

Debtors Module



Configuration

Activity

Customer Dashboard

Debtors Journal Transactions

Debtor Cash Book

Quotation

Sales Order

Sales Order Confirm

Invoices

Quotes

Search Add Edit Clone Cancel Reject Import Reminder Approval Options Print / Export

Basic Search Custom Search Expand

Quote Number:

Description:

Date Type: Quote Date

Date From: 2023-12-09

Order Number:

Customer:

Reference:

Quote Status: Preparation And Scope Creep

Date To: 2024-01-08

Sales Rep.: All

Total Ex VAT: 0.00

Total VAT: 0.00

Total Inc VAT: 0.00

Page 0 of 0

Remove Paging:

Comment

Debtor Status

#

Result

Att

Memo

Status

Date

Valid Until Date

Delivery Date

Completion Date

On the Basic Search Tab, the user can search the quotes by entering information on the following fields

Quote Number	Search by entering the quote number
Description	Search by entering the description of the quote
Date Type	Select the quotes based on date type being Quote date, Quote valid to date, Quote completing date or Quote Delivery date
Date From / Date To	Select the date range for which you want to view the report from Select a date range of when you want to see the report to
Order Number	Search for quote based on client order number
Customer	Search by selecting the customer
Reference	Search quote by reference entered
Quote Status	Select status quote you want to search by on the drop down

Sales Rep	Search the quotes by selecting the sales rep from the drop-down menu
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Expand

Displays additional search criteria options

Quotes

Search

Add

Edit

Clone

Cancel

Reject

Import

Reminder

Approval Options

Print / Export

Basic Search

Custom Search

Contract

Quote Number:

Description:

Date Type:

Quote Date

Date From:

2024-10-19

Order Number:

Customer:

Reference:

Quote Status:

All Valid Quotes Statuses

Date To:

2024-11-18

Sales Rep.:

All

Division:

All

Invoice Group:

All

Internal Contact:

All

Debtor Category:

Debtor From:

Region:

All

Project:

All

Job Number:

Status:

Debtor To:

Total Ex VAT:

649,838.76

Total VAT:

97,469.68

Total Inc VAT:

747,308.44

Custom Search

One can create your own custom fields on the system that are specific to your business and link these to various documents, such as quotation.

The custom search, then allows you to search base off these fields. Example:

Quotes

Search

Add

Edit

Clone

Cancel

Reject

Import

Reminder

Approval Options

Print / Export

Basic Search

Custom Search

Expand

Category:

All

Drawn By:

Janet

Colour:

Material:

Total Ex VAT:

20 545.64

Total VAT:

3 081.85

Total Inc VAT:

23 627.49

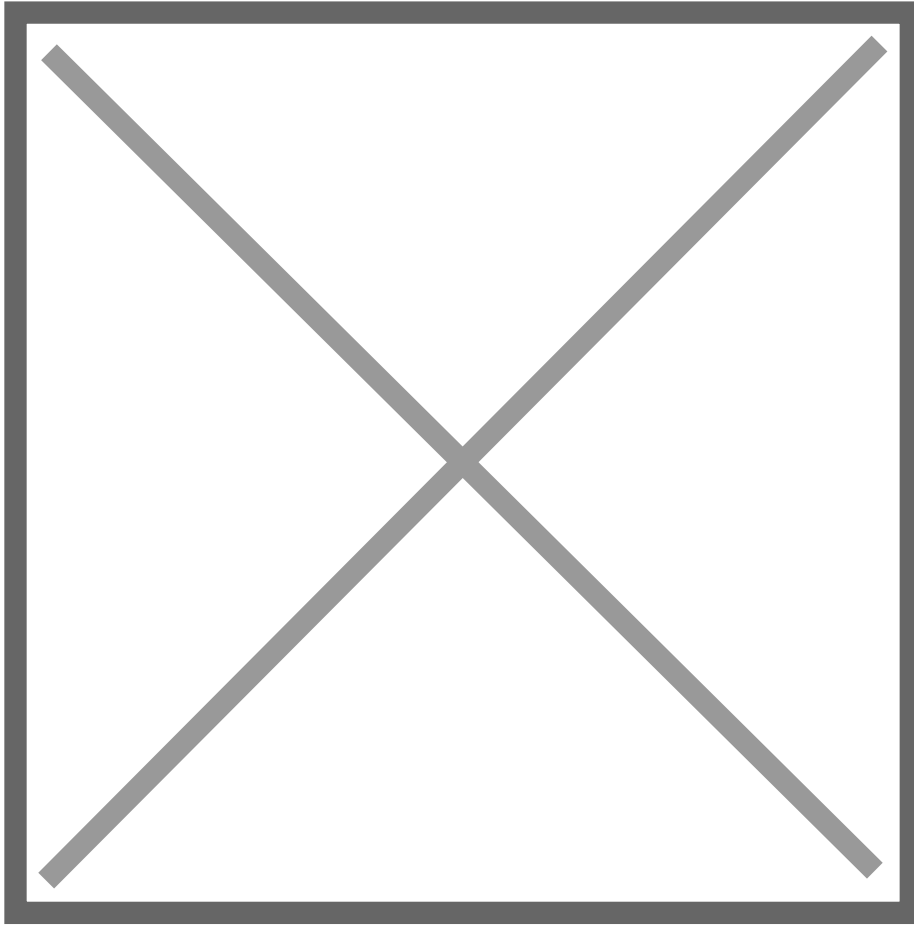
Page 1 of 1

Remove Paging:

Import Quote Template

QT ID	Comment	Follow Up Date (Sa	#	Result	Att	Memo	Info	Status	Date	Valid Until Date	Delivery Date	Completion Date	Quote No	Debtor Code	Debtor Name
1378			1						2024-10-24	2025-02-21	2024-10-24	2024-10-24	QT501426	1172	IMRAAN NEW

Import Quote from CSV



The file to be imported must be in a CSV format.

Click on the Select Files... button to open the navigate window allowing the user to navigate to the file to be imported.

Once the desired file has been located either double click in the file or click the Open button.

Now click on the Upload button. If the upload was successful a window will appear confirming that the upload was successful. Click Ok.

The Import button now becomes enabled allowing the user to click on the Import button to import the file.

An Import Report will open displaying any errors in the import or displaying the successful quotes that were imported.

Note: Please request the Quote Import – Template file from Huge ERP Support.

Approvals Options

Quotes

Search
 Add
 Edit
 Clone
 Cancel
 Reject
 Import
 Reminder
 Approval Options
 Print / Export

Basic Search
 Custom Search
 Contract

Category:

Drawn By:

Colour:

Material:

Gauge:

PO Number:

Internal Approval
 Customer Approval
 Approve To Sales Order
 Approve To Invoice
 Approve To Job
 Return To Internal Approval
 Return To Preparation

Approve Tab has the following buttons

Internal Approval	For the supervisors / managers to approve the quote prior to sending to client.
Customer Approval	This indicates that the quote has been sent to the customer and awaiting approval
Approve to Sales Order	Promotes the quote to a sales order
Approve To Invoice	Promotes the quote to an invoice
Approve To Job	Approves the selected Quote to be a job.
Return to Internal Approval	Reverts the quote status from Customer approval to Internat approval
Return to Preparation	Reverts the quote status from Internat approval to Preparation

Print / Import

Print Tab has the following options

Quotes

Search Add Edit Clone Cancel Reject Import Reminder Approval Options **Print / Export**

Basic Search Custom Search Expand

Category: All

Drawn By: Janet

Colour:

Material:

Total Ex VAT: 20 545.64 Total VAT: 3 081.85 Total Inc VAT:

Page 1 of 1 Remove Paging: Import Quote Template

QT ID	Comment	Follow Up Date (Sa	#	Result	Att	Memo	Info	Status	Date	Valid U	Completion Date
1378			1						2024-10-24	2025-0	2024-10-24

Print / Export menu:

- Print Quote
- Print Job Card
- Print Service Card
- Print Grid
- Print Job Header
- Bulk Print
- Bulk Email
- Export Grid
- Export Grid With Notes
- Export Quote Lines

Print Quote	Prints the currently selected Quote Item.
Print Job Card	Prints the job card for the currently selected Quote Item.
Print Service Card	Prints the service card for the currently selected Quote Item. Similar to a job card, but specific to Service industry or jobs.
Print Grid	Prints the list of quotes displayed on the grid based on the search criteria
Print Job Header	This prints a Header/ Label that can be used to label hard copy files related to the job
Bulk Print	Allows one to simultaneously print multiple quotes selected from the grid
Bulk Email	Allows one to email simultaneously multiple quotes selected from the grid
Export Grid	Exports the listed quotes on the grid to excel
Export Gris with Notes	Exports the listed quotes on the grid into excel and includes any memo notes linked to the respective quotes
Export Quote Lines	Exports into excel the line items on the specific quote selected

Print Quote

Debtors> Activity> Quotation> Print /Export

Print quote from here and email to your clients

Debtor Quote	
Debtor Items Grouped	
Job High Level	
Job Inventory Detail	
Group Stock Category	
Packing Slip	
Show Zero Balance	
Suppress Line Note Printing	
Break On Totals	
Print Line Reference	
Print Quote Totals	
T & C Position	
Hide Qty Column	
Quote Total Value Only	
Quote Proforma Invoice	When printing the quote, there is an option to make the quote a Proforma Invoice. This will change the header of the quote and labels to read Proforma Invoice. The Proforma number will be the quote number

- ☐ Debtor Items Grouped
- ☐ Job High Level
- ☐ Job Inventory Detail
- ☐ Group Stock Category
- ☐ Packing Slip

Show Zero Balance: ☐

Suppress Line Note Printing: ☐

Break On Totals: ☐

Print Line Reference: ☐

Print Quote Totals: ☒

T & C Position: 

Hide Qty Column: ☐

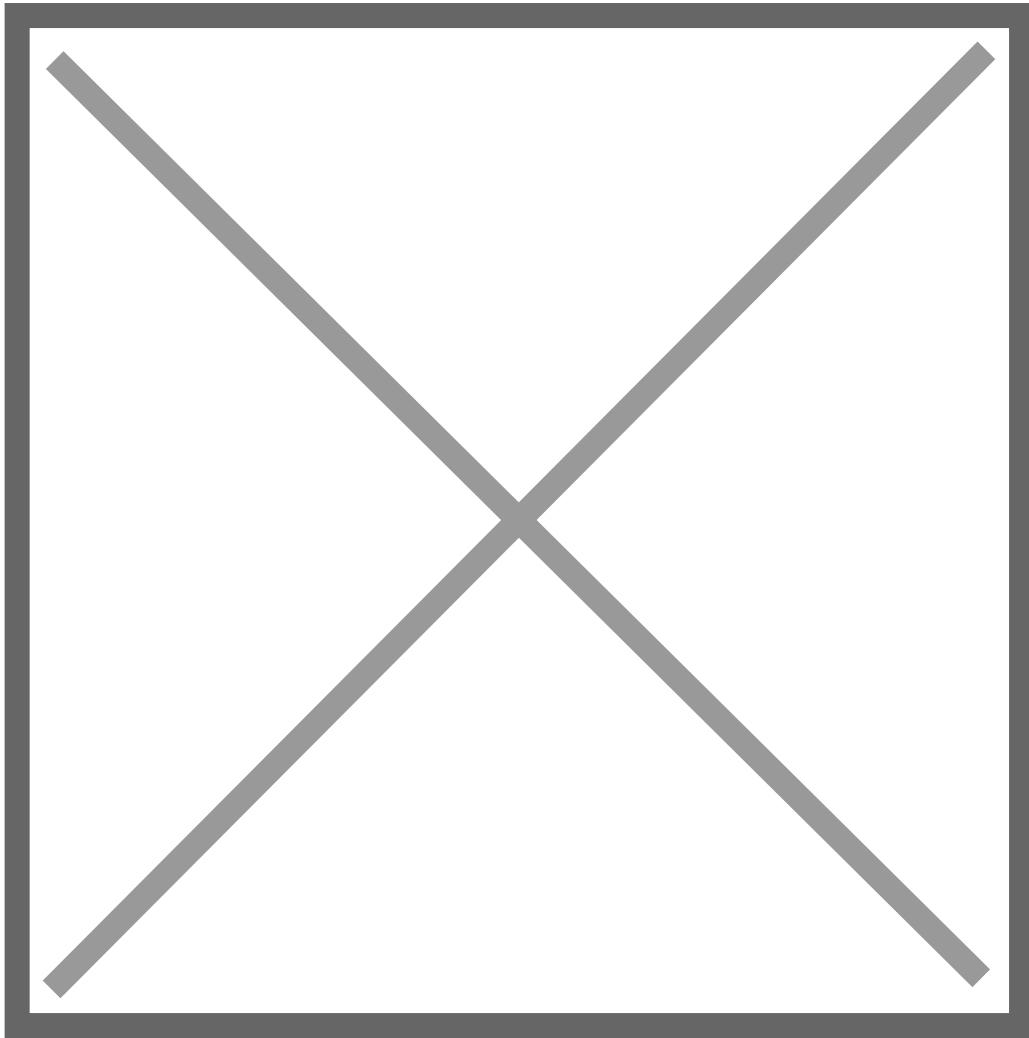
Quote Total Value Only: ☐

Quote Proforma Invoice: ☐

 Continue

 Save & Continue

 Close



Cancel Bulk Quotes

To cancel bulk quotes, tick the checkboxes next to the quotes you want to cancel on the left-hand side, as shown below.

- Then click "**Cancel**"

Quotes

Search Add Edit Clone **Cancel** Reject Reminder Import Approval Options Print / Export

Basic Search Custom Search Expand

Quote Number: Debtors: L: Description: Reference: Date Type: Quote Date Quote Status: Preparation And Scope Creep Date From: 2023-03-01 Date To: 2026-01-19 Order Number: Sales Rep.: All

Total Ex GST: 87,602.32 Total GST: 13,140.42 Total Inc GST: 100,742.74

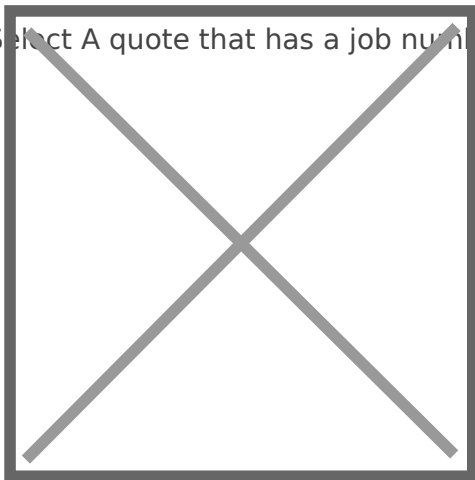
Page 1 of 1 Remove Paging: Import Quote Template Print Quote

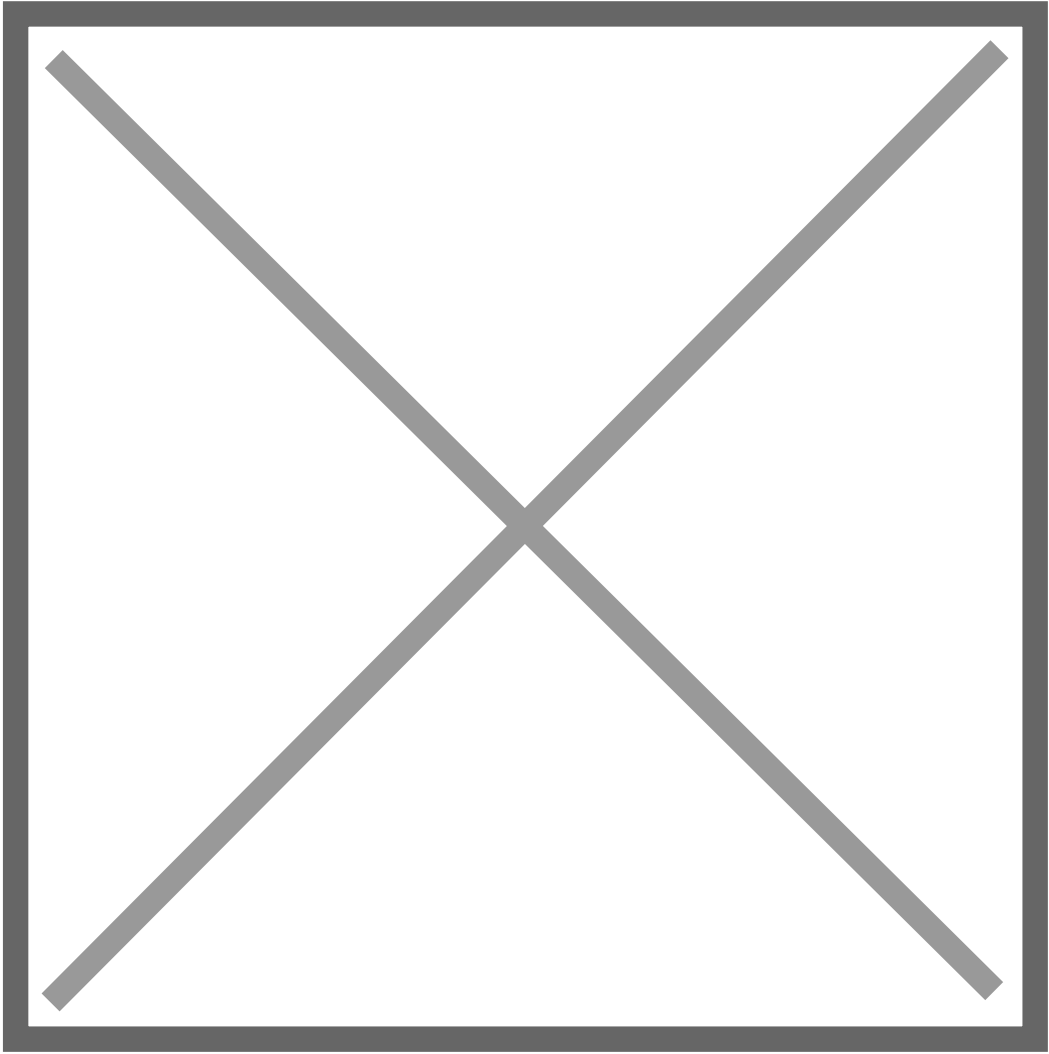
Memo	Fresh / #	Result	Att	Memo	Info	Status	Quote Date	Valid Until Date	Delivery Date	Completion Date	Quote Number	Debtors Code
☒	Fro... 1						2025-03-18	2025-03-25	2025-03-25	2025-03-25	QT279	AIRBNB01
☒	Fro... 2						2025-02-25	2025-03-04	2025-03-04	2025-03-04	QT278	AIRBNB01
☒	Fro... 3						2025-02-21	2025-02-28	2025-02-28	2025-02-28	QT277	AIRBNB01
☒	Fro... 4						2024-12-17	2024-12-24	2024-12-24	2024-12-24	QT275	ABC0010
☒	Fro... 5						2024-11-27	2024-12-04	2024-12-04	2024-12-04	QT273	ABC0010
☐	Fro... 6						2024-11-04	2024-11-11	2024-11-11	2024-11-04	QT272.01	AIRBNB01
☐	Fro... 7						2024-10-17	2024-10-24	2024-10-24	2024-10-17	QT269	AIRBNB02
☐	Fro... 8						2024-10-10	2024-10-17	2024-10-17	2024-10-17	QT268	1234567
☐	Fro... 9						2024-09-03	2024-09-10	2024-09-10	2024-09-10	QT267	AIRBNB02

Print Job Card

Debtors> Activity> Quotation> Print /Export

Select A quote that has a job number and select print job Card form the drop-down arrow.

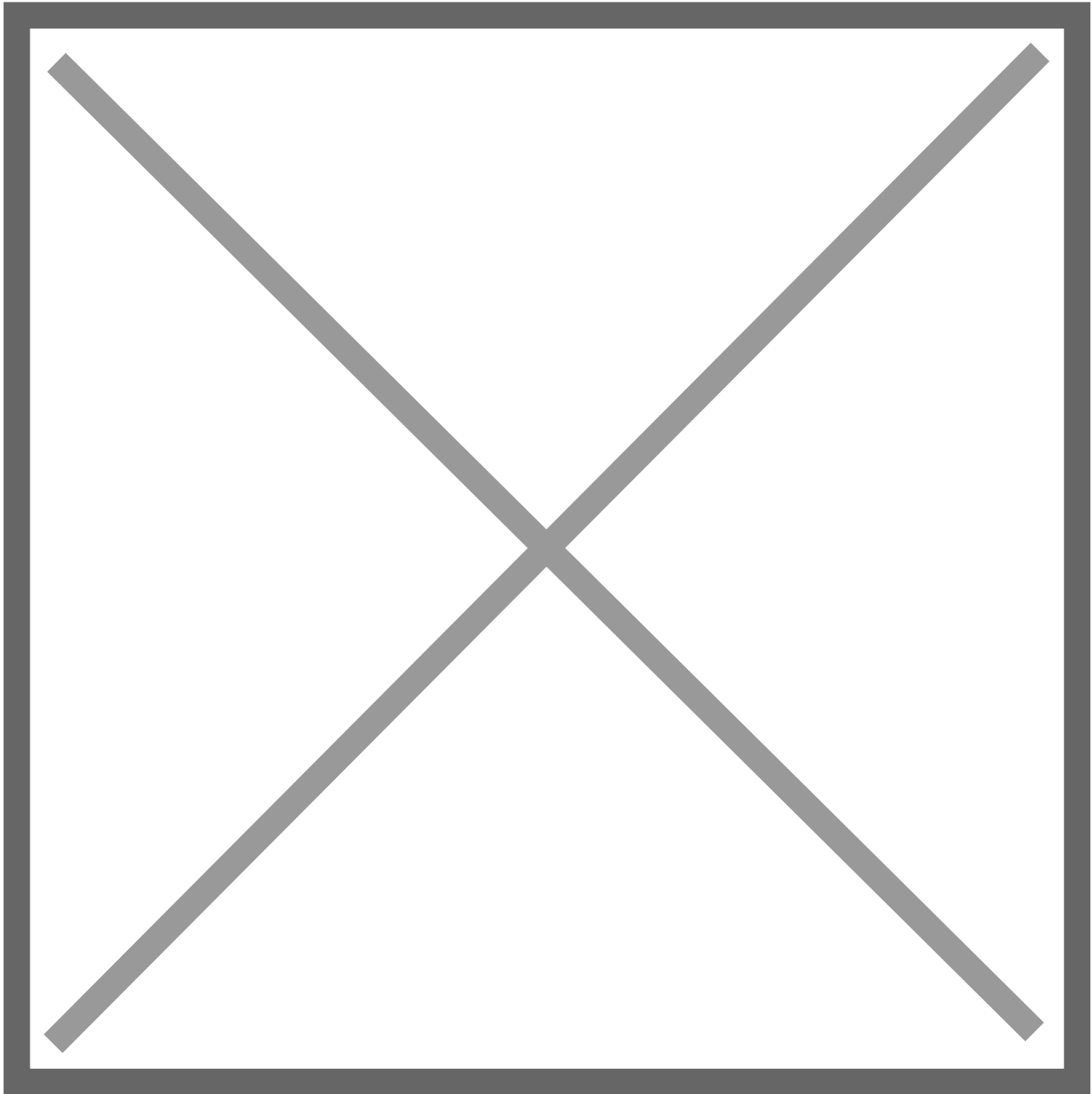




Print Service Card

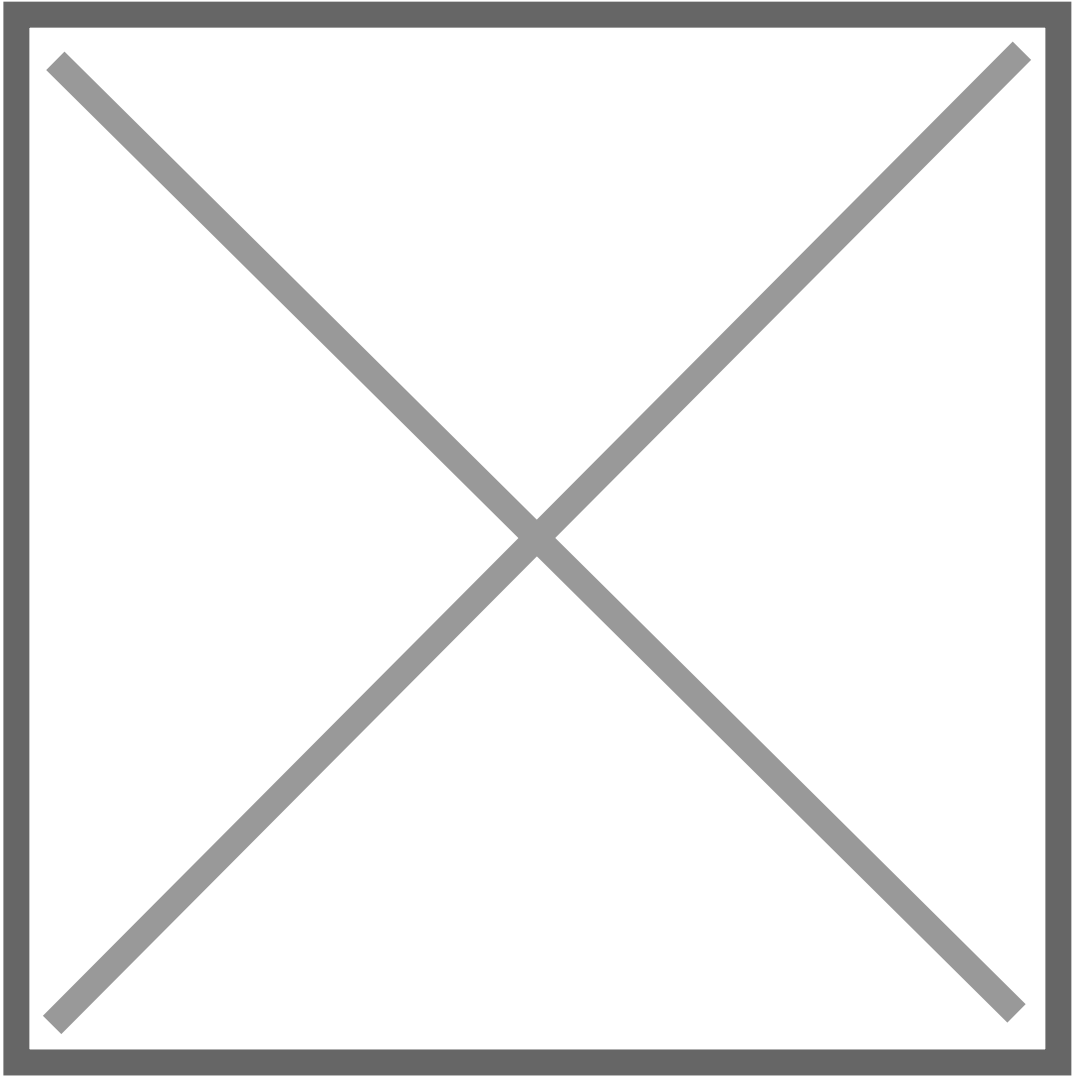
Debtors> Activity> Quotation> Print /Export

Print a service card	Select a quote with a job number and print a service card from the drop-down menu
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Print Grid

Debtors> Activity> Quotation> Print /Export



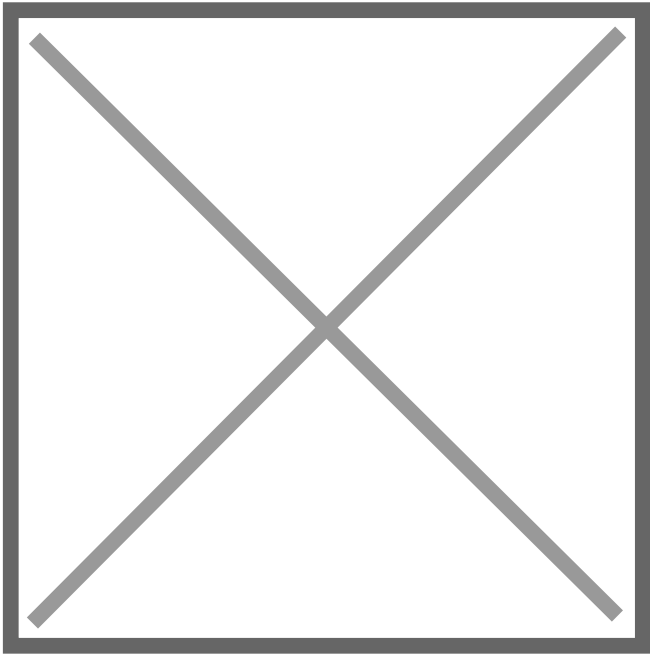
Email	Opens Up the email function.
Copy	Copies to clipboard to enable exporting to excel
Print	Print a hard copy for use.

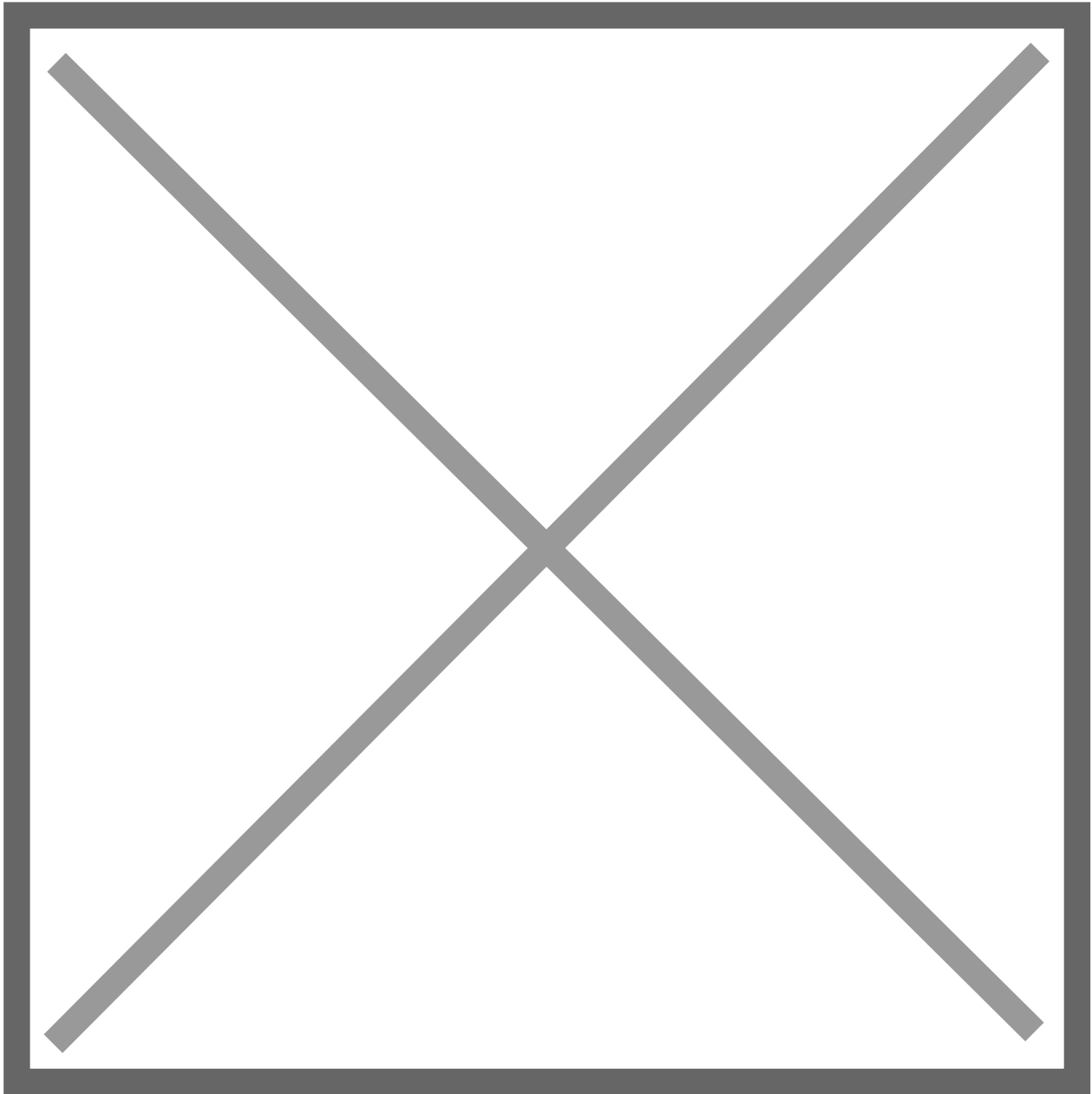
Print Job Header

Select Job Header Print Help

Debtors> Activity> Quotation> Print /Export

Generate	Generates a print layout according to the information contained in that specific Job History Item
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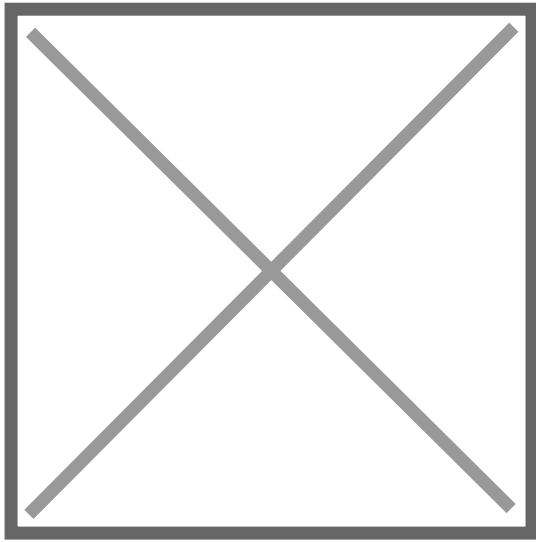




Bulk Print

Quote Print Selection Popup Help

Debtors> Activity> Quotation> Print /Export



This popup window allows the user to select the layout of the quote to be printed.

Debtor Quote is typically used for Debtor Quotes and Standard Job Quotes.

Job High Level is typically used for Job Costing Quotes where Task items have been selected as a line item in the quote. This layout option will print all standard items e.g. Stock, Service and Custom as normal and only the Task Code and Description with the total value of the Task.

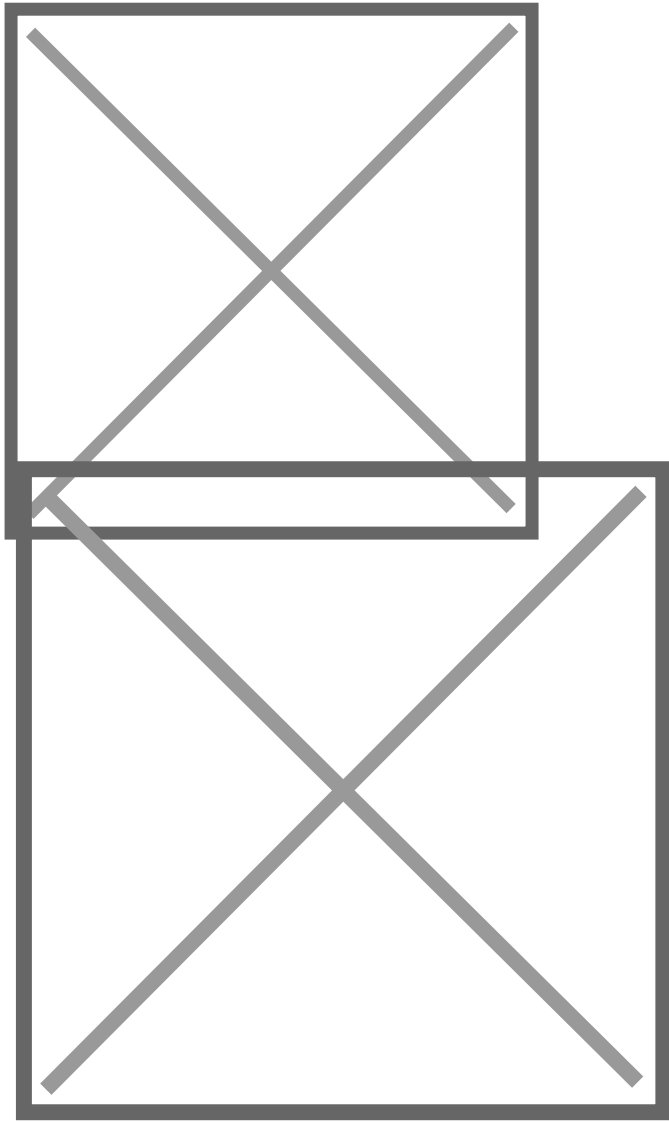
Job Detail Context is typically used for Job Costing Quotes where Task items have been selected as a line item in the quote. This layout option will print all standard items e.g. Stock, Service and Custom as normal and in the case of the Task items, the actual Stock, Service or Custom code will be printed, and the actual item's description will be preceded by the Task's description e.g. Task Description...Standard Item's Description with the actual quantity and value of the Stock, Service or Custom item.

Job Inventory Items is typically used for Job Costing Quotes where Task items have been selected as a line item in the quote. This layout option will print only the standard Stock, Service or Custom items on the quote.

Bulk Email

Quote Print Selection Popup Help

Debtors> Activity> Quotation> Print /Export



This popup window allows the user to select the layout of the quote to be emailed.

Debtor Quote is typically used for Debtor Quotes and Standard Job Quotes.

Job High Level is typically used for Job Costing Quotes where Task items have been selected as a line item in the quote. This layout option will print all standard items e.g. Stock, Service and Custom as normal and only the Task Code and Description with the total value of the Task.

Job Detail Context is typically used to Job Costing Quotes where Task items have been selected as a line item in the quote. This layout option will print all standard items e.g. Stock, Service and Custom as normal and in the case of the Task items, the actual Stock, Service or Custom code will be printed, and the actual item's description will be preceded by the Task's description e.g. Task Description...Standard Item's Description with the actual quantity and value of the Stock, Service or Custom item.

Job Inventory Items is typically used for Job Costing Quotes where Task items have been selected as a line item in the quote. This layout option will print only the standard Stock, Service or Custom items on the quote.

Export Grid

Desktop > Activity > Quotation > Print /Export

Exports the document search grid to excel

Keyboard quick keys

Used with Alt + Letter

S earch	Alt + s	Search for Quotes
A dd	Alt + a	Add a new Quote
E dit	Alt + e	Edits the Quote that is highlighted
C lone	Alt + c	Clone the highlighted Quote
C ancel	Alt + l	Cancel the Quote that is highlighted
R eject	Alt + j	Reject the selected Quote
E xpand / C ontract	Alt + n	Expands / Contracts the header section of the window
Create R eminder	Alt + r	Creates a reminder to highlighted Quote
I mport	Alt + i	Focus on the Import split button
F unctions	Alt + f	Focus on the Function split button
Approval O ptions	Alt + o	Focus on the Approval Options split button
Print / E xport	Alt + t	Focus on the Print / Export split button
Tab Basic Search	Alt + 1	Basic Search
Tab Custom Search	Alt + 2	Custom Search