

Creating a New Quote

Video training manual 2020 - [Click Here](#)

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

Job Costing Module > Activity > New Quote

A job can be created from a Quote

The screenshot displays the 'New Quote' form within the Job Costing Module. The sidebar on the left shows the navigation structure: Job Costing Module > Activity > New Quote. The main form area is divided into several sections. The top section contains fields for Quote Number, Debtors, Debtors Name, Sales Rep, Quote Date, Valid Until Date, Delivery Date, Quote Status, Description, Reference, Order Number, Currency View, Exchange Rate, and Comment. Below these fields is an 'Items' table with columns for #, Type, Image, Seq. No., Code, Status, Description, Qty, UOM, Unit Sale, Total Selling Ex GST, and Unit Cost. At the bottom, there is a 'Footer' section with 'Promotion Value', 'Discount %', 'Service Month', 'Internal Contact', 'Pricing Analysis' (Margin %, Mark-up %, Cost Ex GST, Profit), and a 'Total Selling' summary table.

Quote Details Tab

Quote Number	Quote number will populate when the Quote is saved
Debtors	Search and select the appropriate Account (company) or Contact (individual) from the list.
Debtors Name	Debtors Name will populate when the Quote is saved
Sales Rep	Select a Sales if required

Quote Date	Select Date
Valid Until Date	Select the date until which the quote is valid.
Delivery Date	Select the date when the goods or services are expected to be delivered to the customer.
Quote Status	Automatically updates as the quote progresses through the approval process.
Description	A free-text field used to clearly identify the quote.
Reference	A customer-provided identifier used to track or link the quote
Order Number	A customer-provided number used to identify and track the order
Currency View	Displays the system's default currency, with the option to switch between currencies if multi-currency is enabled.
Exchange Rate	The rate used to convert amounts from one currency to another
Comments	A free-text field used to add notes or additional information about the quote

Address tab

Address Type	The default address is automatically selected, but you can change it for the current quote if needed.
Contact Person	The default contact is automatically selected, but you can change it for this quote. To edit the contact's details, click the view button.
Project	Select the relevant project associated with the quote, if applicable.
Division	The default division is automatically selected, but you can change the customer's division within the company if needed.
Region	The default region is automatically selected, but you can change the customer's region if needed.
Invoice Group	Select the customer's invoice group.

Extras tab

Completion Date	The date when the job is expected to be completed.
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Job No.	Assign a job number to the quote in advance.
Attach Spec To Email	Allows you to include the specification document when sending the quote via email.
Print Custom Fields	Includes custom fields in the printed quote (see Custom Fields tab).
Please select the stock type	Select the type of stock for the item.
Markup %	The percentage added to the cost price to determine the selling price.
Text field	A free-text field used to enter additional details or information.
Set Markup % Button	Allows the user to change the mark-up on selected stock type lines.
Remove lines button	Allows you to remove quote lines based on the selected stock type
Zero Sell, Price	Allows you to set the selling price of the selected stock type lines to zero.
Long Description	A detailed overview providing additional information about the quote.
Custom Fields	Allows you to add and manage additional fields on the quote as needed.

Overall Quote View

You will notice the bottom of the window the selling price, costs and profit that will be made on the job.

- | Attachments Memo Create Reminder Quote History Info Functions ▾ Import ▾ Approval Options ▾ | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|----------|-------|----------|----------------------------------|--------------------------------------|------------------------|-----|------|-----------|----------------------|-----------|-------|---------|-----------|----------|---------------|------|--------|----------|-----|--------|---------|----------|---------|------|
| Quote | | | | | | | | | | | | | | | | | | | | | | | | | |
| <div style="display: flex; justify-content: space-between;"> ← Quote Detail Address Extras Link Shipping Action Docs → </div> | | | | | | | | | | | | | | | | | | | | | | | | | |
| Quote Number: QT-11878 | | | | Quote Status: Preparation | | | | | | | | | | | | | | | | | | | | | |
| Debtors: BAR005 | | | | Description: New Job | | | | | | | | | | | | | | | | | | | | | |
| Debtors Name: Barcode Products | | | | Reference: | | | | | | | | | | | | | | | | | | | | | |
| Sales Rep: Malcolm | | | | Order Number: | | | | | | | | | | | | | | | | | | | | | |
| Quote Date: 2026-05-13 | | | | Currency View: Document Currency | | | | | | | | | | | | | | | | | | | | | |
| Valid Until Date: 2026-05-20 | | | | Exchange Rate: 1 NZD - NZ Dollar | | | | | | | | | | | | | | | | | | | | | |
| Delivery Date: 2026-05-20 | | | | Comment: | | | | | | | | | | | | | | | | | | | | | |
| Save
Close
Print Quote
Job Card
Service Card
T & Cs | | | | | | | | | | | | | | | | | | | | | | | | | |
| Items | | | | | | | | | | | | | | | | | | | | | | | | | |
| Page 1 of 1 Paging Add Note Edit Delete Quick Add Dimension Show/h | | | | | | | | | | | | | | | | | | | | | | | | | |
| # | Type | Image | Seq. No. | Code | Status | Description | Qty | UOM | Unit Sale | Total Selling Ex GST | Unit Cost | | | | | | | | | | | | | | |
| 1 | Stock | | 1 | KEYBOARD | ● | Keyboard USB | 1 | | 25.00 | 25.00 | 13.3 | | | | | | | | | | | | | | |
| 2 | Stock | | 2 | SCANSKU/G/2D | ● | ScanSKU G-Series 2... | 1 | Each | 1,149.00 | 1,149.00 | 887.1 | | | | | | | | | | | | | | |
| 3 | Stock | | 3 | PRI/GODX/RT200i | ● | Printer Godex RT200... | 1 | Each | 825.00 | 825.00 | 634.1 | | | | | | | | | | | | | | |
| <div style="display: flex; justify-content: space-between;"> Pricing Analysis <table style="margin-left: auto;"> <thead> <tr> <th>Total</th> <th>Selling</th> </tr> </thead> <tbody> <tr> <td>Sub Total</td> <td>1,999.00</td> </tr> <tr> <td>Less Discount</td> <td>0.00</td> </tr> <tr> <td>Ex GST</td> <td>1,999.00</td> </tr> <tr> <td>GST</td> <td>299.85</td> </tr> <tr> <td>Inc GST</td> <td>2,298.85</td> </tr> <tr> <td>Deposit</td> <td>0.00</td> </tr> </tbody> </table> </div> | | | | | | | | | | | | Total | Selling | Sub Total | 1,999.00 | Less Discount | 0.00 | Ex GST | 1,999.00 | GST | 299.85 | Inc GST | 2,298.85 | Deposit | 0.00 |
| Total | Selling | | | | | | | | | | | | | | | | | | | | | | | | |
| Sub Total | 1,999.00 | | | | | | | | | | | | | | | | | | | | | | | | |
| Less Discount | 0.00 | | | | | | | | | | | | | | | | | | | | | | | | |
| Ex GST | 1,999.00 | | | | | | | | | | | | | | | | | | | | | | | | |
| GST | 299.85 | | | | | | | | | | | | | | | | | | | | | | | | |
| Inc GST | 2,298.85 | | | | | | | | | | | | | | | | | | | | | | | | |
| Deposit | 0.00 | | | | | | | | | | | | | | | | | | | | | | | | |

Attachments Memo Create Reminder Quote History Info Functions Import Approval Options

Quote

Quote Detail Address Extras Link Shipping Action Docs

Quote Number: **QT-11878**

Debtors:

Debtors Name: Barcode Products

Sales Rep:

Quote Date:

Valid Until Date:

Delivery Date:

Quote Status: **Preparation**

Description:

Reference:

Order Number:

Currency View:

Exchange Rate: NZD - NZ Dollar

Comment:

Save

Close

Print Quote

Job Card

Service Card

T & Cs

Items

Page 1 of 1

#	Type	Image	Seq. No.	Code	Status	Description	Qty	UOM	Unit Sale	Total Selling Ex GST	Unit Cost
1	Stock		1	KEYBOARD	●	Keyboard USB	1		25.00	25.00	13.3
2	Stock		2	SCANSKU/G/2D	●	ScansKU G-Series 2...	1	Each	1,149.00	1,149.00	887.1
3	Stock		3	PRI/GODX/RT200i	●	Printer Godex RT200...	1	Each	825.00	825.00	634.0

Footer

Promotion Value: 0.00 Clear Discount

Discount %: Amt:

Service Month:

Internal Contact:

Pricing Analysis

Margin % 23.24

Mark-up % 30.27

Cost Ex GST 1,534.440

Profit 464.56

Total

Sub Total 1,999.00

Less Discount 0.00

Ex GST 1,999.00

GST 299.85

Inc GST 2,298.85

Deposit 0.00

The below window will provide you with options on what you want your quote to look like.

Click "**Continue**"

Quote Print Selection [X]

Print Selection [Settings] [Help]

Select: ☒ Debtors Quote
☐ Debtors 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: [v]
Hide Qty Column: ☐
Quote Total Value Only: ☐
Quote Proforma Invoice: ☐

[Continue] [Save & Continue] [Close]

You can choose to send the quote, email it to yourself to include in an outbound message, or print a copy for your records.

PrintEmailEmail To SelfCloseCopy

Quotation

BARCODE
PRODUCTS



Helping businesses increase efficiency since 1994.

Quotation To:

Barcode Products
29 Woodhaven Place
Parklands
Christchurch
8083

Barcode DEMO
Address:
5/201 Opawa Road, Unit 5, Hillsborough, Christchurch
Phone: 022-430-2523
Email: service@barcodeproducts.co.nz
Web: www.barcodeproducts.co.nz
GST No: 136-715-402

Delivery Address:

Malcolm Granville
29 Woodhaven Place
Parklands
Christchurch
8083

Quote No: QT-11878

Quote Date: 13 May 2026
Terms: CASH SALE
Valid to Date: 20 May 2026
Reference:

Description: New Job

Code	Description	QTY	UOM	Price	Disc %	Sub Total
KEYBOARD	Keyboard USB	1		25.00		25.00
SCANSKU/G/2D	ScanSKU G-Series 2D Scanner 5.99" touch screen	1	Each	1,149.00		1,149.00
PRI/GODX/RT200i	Printer Godex RT200i Printer USB, RS-232, ETH 203DPI 2" with LCD	1	Each	825.00		825.00

Revision #1

Created 14 June 2026 23:46:54 by Pamela

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