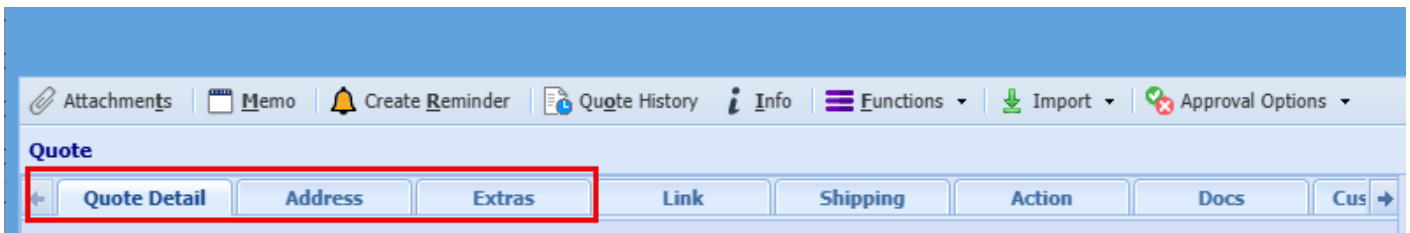


Quote Creation

Quote Creation

[Job Costing](#) > [Activity](#) > [Quote](#)

Before adding your line items to your quote, take a moment to review the key tabs across the top of your page, some of these tabs may contain important options you may want to configure or define first for a basic Quote.



Quote Detail Tab:

- Click "**Add**"
- Enter the Customer name and Description.
- Click "**Save**" (By clicking save you activate the button allowing you to "Add" a line item.)

Job Costing Module

Configuration

Activity

New Quote

Quotation

Bookin

Manage Job

Job Lines

Planned Timelog Schedule

Job Schedule Activity

Time Tracker Exports

GRV to Job

Picking Slip

Job Total Analysis

Job Delivery Note

Job Invoice

Collect / Deliver

Quotes

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

Basic Search Custom Search Expand

Quote Number: Customer: L:

Quote

Quote Number: **QT298**

Customer: BAR001

Customer Name: Barcode

Sales Rep: Dealer

Quote Date: 2025-10-31

Valid Until Date: 2025-11-07

Delivery Date: 2025-11-07

Quote Status: **Preparation**

Description: Sales

Reference:

Order Number: 12587

Currency View: Document Currency

Exchange Rate: 1 NZD - NZ Dollar

Comment:

Attachments Memo Create Reminder Quote History Info Functions Import Approval Options

Quote Detail Address Extras Link Shipping Action Docs Cus

Save Close

Print Quote

Job Card

Service Card

T & Cs

Items

Page 0 of 0

Paging Add Note Edit Delete Quick Add Dimension Show/Hide

#	Line Ref.	Seq. No.	LS	Status	Type	Code	Description	Unit Sale
---	-----------	----------	----	--------	------	------	-------------	-----------

Footer

Promotion Value: 0.0000 Clear Discount

Discount %: 0 Amt: 0.00

Service Month: October

Internal Contact: Acck Support

Pricing Analysis

Margin %	0.0000
Mark-up %	0.0000
Cost Ex VAT	0.0000
Profit	0.00

Total

Sub Total	0.00
Less Discount	0.00
Ex VAT	0.00
VAT	0.00
Inc VAT	0.00
Deposit	0.00

Selling

Address Tab:

- Use this tab to update the job address if required.
- Select the contact person for the quote from the dropdown list.
- If the contact does not exist yet, click the **View** button to add a new contact on the fly

Note: if details are edited on the quote, this will only apply to the specific quote and not update the debtor setup unless the debtor setup is access and updated as well.

Extras Tab:

Select the billing method that applies to this job

Among the top tabs, click on the "**Extras**" tab.

- Tick the box that applied to your customer.
- Click "**Save**"

Assembly	" Assembly " refers to an internal process where components or materials are prepared, combined, or staged before installation or delivery. It's not billed separately to the customer but contributes to your overall job cost.
Charge Up (SC)	"Charge Up (SC)" means the customer is billed for actual time and materials used, including any extras beyond the initial scope. Charge Up allows you to invoice for additional costs incurred during the job.
Prepaid (CTC)	"Prepaid" refers to the quoted amount for the job, the fixed charge agreed to by the customer. You can't invoice beyond this amount, so any extra time, materials, or costs that exceed the quote become your internal expense, or ' Cost to Company (CTC)

Attachments

Memo

Create Reminder

Quote History

Info

Functions

Import

Approval Options

Quote

Quote Detail

Address

Extras

Link

Shipping

Action

Docs

Cus

Quote Number:

QT298

Quote Status:

Preparation

Customer:

BAR001

Description:

Sales

Customer Name:

Barcode

Reference:

Sales Rep:

Dealer

Order Number:

12587

Quote Date:

2025-10-31

Currency View:

Document Currency

Valid Until Date:

2025-11-07

Exchange Rate:

1 NZD - NZ Dollar

Delivery Date:

2025-11-07

Comment:

Save

Close

Print Quote

Job Card

Service Card

T & Cs

Items

Page 0 of 0

Paging

Add

Note

Edit

Delete

Quick Add

Dimension

Show/Hide

#	Line Ref.	Seq. No.	LS	Status	Type	Code	Description	Unit Sale

Footer

Promotion Value:

0.0000

Clear Discount

Discount %:

0

Amt:

0.00

Service Month:

October

Internal Contact:

Acck Support

Pricing Analysis

Margin %

0.0000

Mark-up %

0.0000

Cost Ex VAT

0.0000

Profit

0.00

Total

Sub Total

0.00

Less Discount

0.00

Ex VAT

0.00

VAT

0.00

Inc VAT

0.00

Deposit

0.00

- From the dropdown menu, choose the relevant item (**Stock**, **Service**, or **Custom Items**.)

Add Quote Item

Quote Item

Inventory Overview View Image Special Item Functions Currency: NZD - NZ Dollar Category: Close

Details Notes UOM Specs Build kit

Stock Item: Tasks: ☐

Lead Time:

Description: 00-1000 - African Daisy Seed - Stk - 45.0000 Order Date: 2025-10-31

Item Group: 00-1005 - Balloon Flowers Seed - Stk - 10.0000 Reminder Date: 2025-10-31

Qty: 0852738006003 - flash - Stk - 10.0000 Required Date: 2025-10-31

10-1000 - African Daisy 10cm High Plant - Stk - 32.0000 Supplier:

10-1005 - Balloon Flowers 10cm High Plant - Stk - 10.0000 Drop Ship: ☐ RFQ: ☐

Pricing Structure: 22249800101 - PE35/8.795 coated paper 35/8 gsm 482kg - Stk - 6.0000 PO Qty:

Selling Ex VAT: 22249800102 - PE35/8.795 coated paper 35/8 gsm 481kg - Stk - 10.0000 Item Cost:

Selling Inc VAT: 22249800103 - PE35/8.795 coated paper 35/8 gsm 482kg - Stk - 10.0000 Item Code:

Sub Total Selling: 22249800201 - PE35/8.795 coated paper 35/8 gsm 488kg - Stk - 10.0000 Supp. Discount:

VAT Value: 22249800202 - PE35/8.795 coated paper 35/8 gsm 489kg - Stk - 10.0000 Last Updated:

Total Selling: 22249800203 - PE35/8.795 coated paper 35/8 gsm 488kg - Stk - 10.0000 Latest Cost:

Line Reference: 22249800301 - PE35/8.795 coated paper 35/8 gsm 490kg - Stk - 10.0000 Last Updated By:

Sequence No: 22249800302 - PE35/8.795 coated paper 35/8 gsm 490kg - Stk - 10.0000 Internal Note:

Zero Cost On Job: ☒ Zero Cost On Invoice: ☒ Show In Print: ☒ Flag for Report: ☐

Build Selection: Weight Per Unit: T/W: 0.00

Division: Sales Rep:

Region: Project:

Days from Start: Employee Assigned:

Qty On Sales Orders: 0

Qty on SO Confirm / WHS: 0

- Once selected, check the basic fields:
 - 1 Select Item
 - 2 Check description as this can be changed at this point
 - 3 Add Quantity
 - 4 Check Cost of Item
 - 5 Check your markup
 - 6 Check Sell Price
- click **Save & Close** to confirm your choice
- Add as many as items as needed

Edit Quote Item
QTY: 18

Inventory Overview
View Image
Special Item
Functions
Currency: NZD - NZ Dollar
Category: Stock
Close

Details
Notes
UOM
Specs
Build kit

Stock Item: 1 Drink bottle - Drink bottle Drink bottle
Description: 2 Drink bottle Drink bottle |
Item Group:
Qty: 3 7
Warehouse: MAST - Master Warehouse

Pricing Structure: Default
Selling Ex VAT: 6 26
Selling Inc VAT: 29.9
Sub Total Selling: 182.00
VAT Value: 27.30
Total Selling: 209.30
Line Reference:
Sequence No: 1.0000
Promotion:

UOM Type:
UOM:
Line Discount: 0.0000 26.00
VAT Type: 01 Invoice GST:15
Mark-up %: 5 30.00
Cost Per Unit: 4 20.0000
Profit Cost / Unit: 6.0000
Total Cost: 140.0000

Zero Cost On Job:
Zero Cost On Invoice:
Show In Print: ☒
Flag for Report:
Build Selection:
Division:
Region:
Days from Start: 0
Weight Per Unit: 0 T/W: 0.0000
Sales Rep: Dealer
Project:
Employee Assigned:

Lead Time:
Order Date: 2025-10-31
Reminder Date: 2025-10-31
Required Date: 2025-10-31
Supplier: Rectron
Drop Ship:
RFQ:
PO Qty: 0
Item Cost: NZD 20.0000
Item Code: Drink bottle
Supp. Discount: 0.0000% 20.0000
Last Updated: 2025-03-22 21:24:48
Latest Cost: 20.00
Last Updated By: System Process
Internal Note:
Qty On Sales Orders:
Qty on SO Confirm / WHS:

Save & New
Save & Close
Close
Update Cost

Stock Item	Select your stock item from the drop-down menu
Description	At this stage you can change the Description if needed
Qty	Add the Quantity you require of this item
Cost Per Unit	Check the cost of this item
Mark up %	At this stage you can increase your profit %
Selling Ex GST	Price does not include the 15% Goods and Services Tax. You add GST on top of the listed amount.

You can now submit this quote for customer approval.

At the top of the quote, you'll find **Approval Options**. From here, you can either send the quote for internal approval before forwarding it to the customer, or send it directly to the customer. Once customer approval is received, use the same dropdown menu to promote the quote to a Job.

Attachments Memo Create Reminder Quote History Info Functions Import Approval Options

Quote

Quote Number: **QT298** Quote Status: **Preparation**

Customer: **BAR001** Description: **Sales**

Customer Name: **Barcode** Reference:

Sales Rep: **Dealer** Order Number: **12587**

Quote Date: **2025-10-31** Currency View: **Document Currency**

Valid Until Date: **2025-11-07** Exchange Rate: **1** **NZD - NZ Dollar**

Delivery Date: **2025-11-07** Comment:

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

Save
Close
Print Quote
Job Card
Service Card
T & Cs

Items

Page 1 of 1

#	Line Ref.	Seq. No.	LS	Status	Type	Code	Description	Unit Sale
1		1			Stock	Drink bottle	Drink bottle Drink bottle	26.00
2		2			Stock	BOOK1	Book Red	50.00
3		3			Service	CONTRACT/PTT	Contract Service Item PTT	65.00
4		4			Service	LAB001	Labour	100.00

Footer

Promotion Value: 0.0000 Clear Discount

Discount %: 0 Amt: 0.00

Service Month: October

Internal Contact: Acck Support

Pricing Analysis

Margin %	77.2329
Mark-up %	339.2300
Cost Ex VAT	260.0000
Profit	882.00

Total Selling

Sub Total	1,142.00
Less Discount	0.00
Ex VAT	1,142.00
VAT	171.30
Inc VAT	1,313.30
Deposit	0.00

Once you click **Approve to Job** you will have the below **Approve Quote to Job** screen pop up.

You will always need an Order number, here you will also make sure you have selected whether this is a Charge Up (Scope Creep) or a prepriced (Cost to company) job.

Approve Quote To Job

Quote - Approval

Job Details

BOM Create

Quote Number:

QT298

Quote Date:

2025-10-31

Customer:

Barcode

Branch:

HSOF

Description:

Sales

Order Number:

12587

Long Description:

Team:

Team 1

Allow To Exceed Quote Value:

☒

Employee:

All

Allow To Exceed Budget Qty:

☒

Department:

All

Activate Report Dates:

☒

Function:

All

Use Build Task Defaults:

☐

Est Start Date:

2025-11-04

Hrs:

1

Charge Up (SC):

☐

Assembly:

☐

Group Activity:

Prepriced (CTC):

☐

Lock Employee:

☐

Completion Date:

2025-11-07

Warehouse:

MAST - Master Warehouse

Delivery Date:

2025-11-07

Job Link:

Create PO Drop Ship:

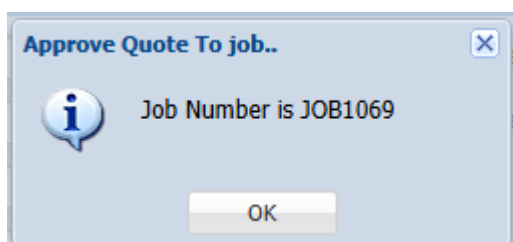
☐

>>> Continue

Close

Service Card

- Click **Continue** to create the job



Revision #1

Created 16 June 2026 01:57:07 by Pamela

Updated 16 June 2026 01:57:52 by Pamela