

Quote Tabs Explained

Job Costing Module >Activity > Quotation

1. Open or Create a Quote

- Navigate to the **Quotes** section.
- Click **"Add"** or open an existing one.

2. Locate the Customer Field

- Look for a field labeled **Customer, Account, or Contact**.

3. Save the Quote

- Click **Save** to lock in the selected customer.

Tips

- If the customer isn't listed, you may need to **create a new customer record first**.
- Ensure you select the correct type (Account vs Contact) depending on your system's setup.

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 Detail Address Extras Link Shipping Action Docs Cus

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

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

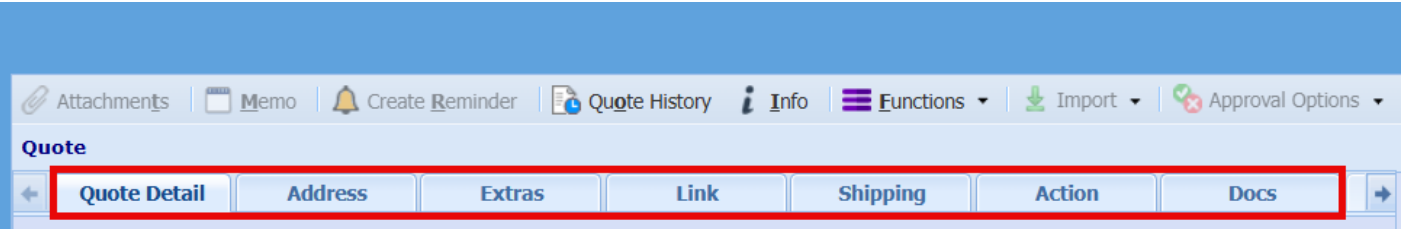
Discount %: 0 Amt: 0.00

Service Month: October

Internal Contact: Acck Support

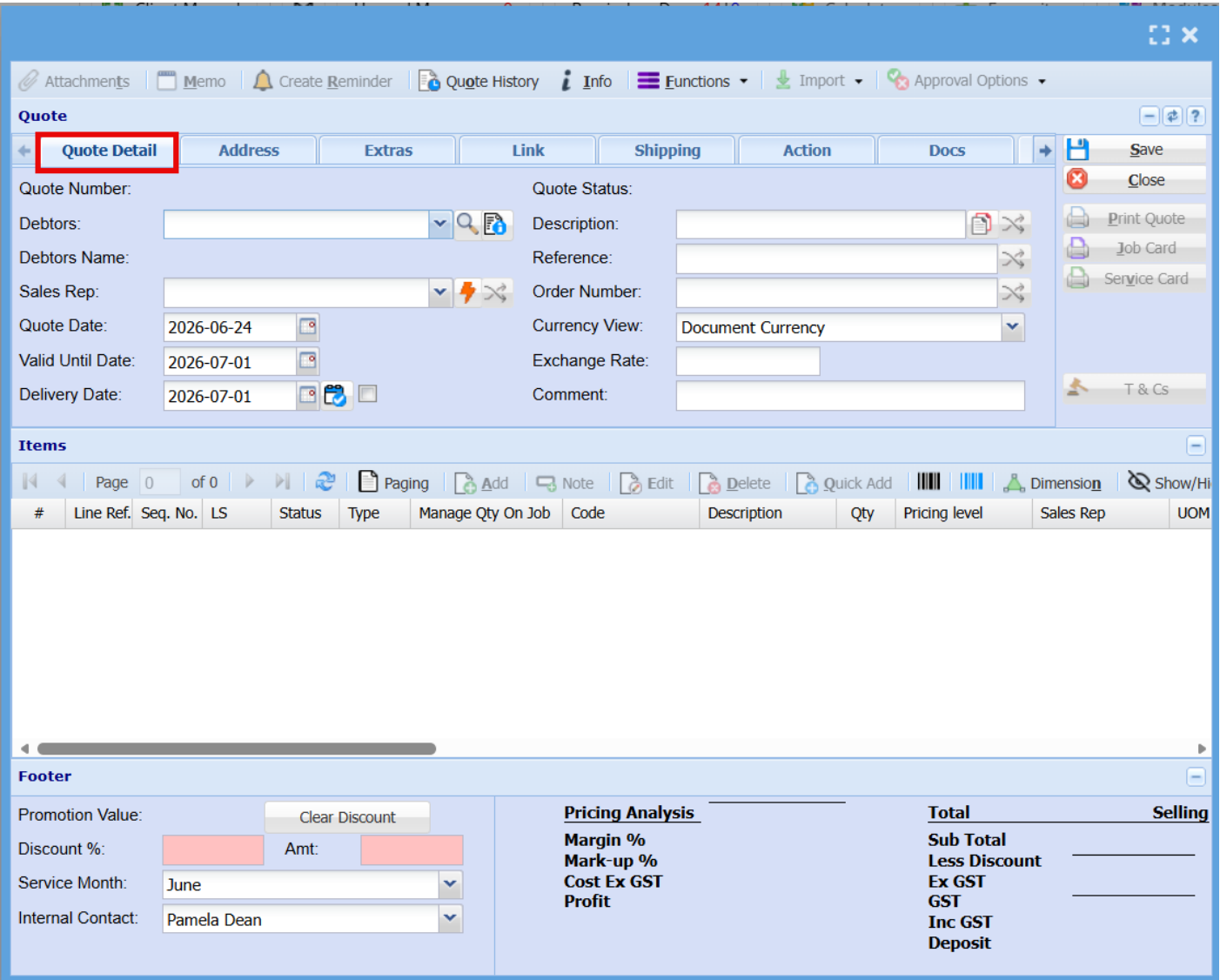
Pricing Analysis		Total	Selling
Margin %	0.0000	Sub Total	0.00
Mark-up %	0.0000	Less Discount	0.00
Cost Ex VAT	0.0000	Ex VAT	0.00
Profit	0.00	VAT	0.00
		Inc VAT	0.00
		Deposit	0.00

Quote Tabs Explained Detailed



Quote Detail Tab

This screen is used to create and manage customer quotes, capturing key details such as the customer, dates, pricing, and references, while allowing you to add and manage items included in the quote.



Quote	Automatically generated
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Customer	Choose the appropriate Account (company) or Contact (individual) from the list
Customer Name	Auto populates as customer is selected
Sales Rep	Select a sales rep for this customer
Quote Date	Usually today's date
Valid Until Date	Select the date until which the quote is valid.
Delivery Date	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

The **Address tab** captures and allows editing of the customer's delivery and contact details for the quote, including address information, contact person, and associated business details such as project, division, and branch.

Quote

Attachments Memo Create Reminder Quote History Info Functions Import Approval Options

Quote Detail **Address** Extras Link Shipping Action Docs Cus

Address Type: Delivery ⚡

Address Line 1: 1a Pilgrim Place

Address Line 2: Sydenham

Address Line 3: Christchurch

Address Line 4:

Address Code:

VAT No:

Contact Person: Pamela Dean - 03 341 1345 View

Contact No: 03 341 1345

Project:

Division:

Region:

Invoice Group:

Branch: HSOE - Huge ERP DEMO

Save Close Print Quote Job Card Service Card T & Cs

Address Type	The default address is automatically selected, but you can change it for the current quote if needed.
Address Lines 1-4	Address
Address Code	Postal Code
VAT No.	Customer Tax Number
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.
Contact Number	Customer Contact Persons Number
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.
Branch	Company Branch

Extras Tab

The **Extras tab** provides additional settings and controls for the quote, including job details, asset linking, costing options, reporting preferences, and sales lead tracking, allowing for better management of how the quote is processed, billed, and reported.

Attachments Memo Create Reminder Quote History Info Functions Import Approval Options

Quote

Quote Detail Address **Extras** Link Shipping Action Docs Cus Save Close Print Quote Job Card Service Card T & Cs

Job No.: 1 8 Assign JN Long Description: 9

Completion Date: 2 2025-11-14

Asset Item: 3

Customer Status: 4

Assembly: 5 10 Print Custom Fields: 13 Quote Total Description 16 Quote Estimate 17 Probability: 0%

Charge Up (SC): 6 11 Manage Qty On Job: 14 Sales Lead: 15 Sales Lead Follow Up Date:

Prepriced (CTC): 7 12 Exclude From Reports:

Items 18 19 20

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

refresh Barcode Printing

Footer

Promotion Value: Clear Discount

Discount %: 0.00 Amt: 0.00

Service Month: November

Internal Contact: Acck Support

Pricing Analysis

Margin %
Mark-up %
Cost Ex VAT
Profit

Total

Sub Total
Less Discount
Ex VAT
VAT
Inc VAT
Deposit

Selling

1	Job Number	Clicking ' Assign JN ' at this stage will generate a Job Number for the quote, which will automatically carry over once the quote is approved and converted into a actual job.
2	Completion Date	This is the date that you are expected to be able to complete this Job
3	Asset Item	The Asset Item field links a company-owned asset (e.g., printer, scanner, laptop) to a specific job or quote. This ensures equipment used is tracked, recorded, and associated with the job for better visibility and management.
4	Customer Status	Options "On Hold"

5	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.
6	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.
7	Prepaid (Cost to Company)	"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)
8	Assign JN	Clicking ' Assign JN ' at this stage will generate a Job Number for the quote, which will automatically carry over once the quote is approved and converted into a actual job.
9	Long Description	Here you can write a description of the job being done.
10	Print Custom Fields	Includes custom fields in the printed quote (see Custom Fields tab).
11	Manage Qty on Job	The "Manage Qty on Job" tick box automatically transfers and manages item quantities when a quote is converted into a job, ensuring quantities remain accurate without manual adjustment.
12	Exclude from Reports	This flag will assist when running reports on quote values, allowing us to exclude certain quotes (effectively treating them as zero).
13	Quote Total Description	
14	Sales Lead	If this quote originated from a tracked Sales Lead , the associated Sales Lead number will be displayed here. Updating the Probability percentage will automatically sync the change with the corresponding Sales Lead.

15	Sales Lead Follow up Date	Updating the Follow up the system will automatically sync the change with the corresponding Sales Lead follow up date.
16	Quote Estimate	
17	Probability	If this quote originated from a tracked Sales Lead , the associated Sales Lead number will be displayed here. Updating the Probability percentage will automatically sync the change with the corresponding Sales Lead.
18	Paging	If your line items span multiple pages and require navigation using the page up/down arrows, clicking the Paging Box will disable paging, allowing you to scroll through all items in a continuous view.
19	Dimension	
20	Show/Hide	Allows you to control which sections or fields are visible on the screen. This can help simplify the interface by hiding fields that are not relevant to your workflow.

Link Tab

Below is an overview of the fields available under the **Link Tab** on the quote screen:

Print Barcodes

1	Customer Link	• Customer Link: Use this tab when completing work on behalf of another company. • If you're quoting for a client of one of your customers, you can link that end client here. • When the quote is sent, your customer will see which of their clients the quote relates to.
2	Address Type	This defines the type of address being used (for example, billing, delivery, or site address). Selecting the correct type ensures the quote is applied to the right location.

3-6	Address line 1-4	These fields capture the full address details associated with the quote. You can enter street, suburb, city, and any additional location information required.
7	Address code	A reference code used to identify saved or standard addresses.
8	Deposit Paid	Enter the value of the deposit paid. This amount will be automatically deducted from the total quote value , giving a more accurate balance owing.
9	Deposit Amount	Tick this box if the customer has already made a deposit payment . This flags the quote so the system knows part payment has been received.
10	Deposit Date	Record the exact date the deposit was received . This is useful for tracking payments and keeping financial records accurate.
11	Paging	When a quote contains a large number of line items, they may be split across multiple pages. • With Paging enabled, you scroll through all items in one continuous list • With Paging off, you use page navigation arrows to move between pages. This helps improve visibility depending on your preference.
12	Dimension	
13	Show/Hide	Allows you to control which sections or fields are visible on the screen. This can help simplify the interface by hiding fields that are not relevant to your workflow.

Shipping Tab

Below is a detailed overview of the fields available under the **Shipping tab** on the quote screen:

5	Internal Delivery	Used when the delivery is being handled internally by your own team or vehicles , rather than an external courier.
6	Delivery Company	Select or enter the external courier or freight company responsible for delivering the shipment (e.g. NZ Post, Mainfreight).
7	Tracking Number	Enter the tracking number provided by the courier. This allows both your team and the customer to track the shipment progress.
8	Frozen	Enter the tracking number provided by the courier. This allows both your team and the customer to track the shipment progress.
9	Paging	When there are many line items: • Paging enabled: all items appear in one continuous, scrollable list • Paging disabled: items are split across multiple pages and require navigation This helps improve visibility depending on your preference.
10	Dimension	
11	Show/Hide	Allows you to customise the screen view by showing or hiding certain fields or sections, helping keep the interface clean and relevant.

Action Tab

Below is a detailed overview of the fields and functions available under the **Action tab** on the quote screen:

Attachments Memo Create Reminder Quote History Info Functions Import Approval Options

Quote

Quote Detail Address Extras Link Shipping **Action** Docs Cus

Stock Type: 1 All

Update Value: 2 Excluding VAT Including VAT

Rounding: 3 Round Up Round Down

Rounding: 4 No Rounding Mark-up %: 5

6 7 8

9 Incl. Costs On Reports

10 Attach Spec To Email:

11 Set To Supplier Cost

12 Update Labour Cost

13 Set To System Cost

14 Set Sell Price

Save Close

Print Quote

Job Card

Service Card

T & Cs

Items

15

16 17

Page 0 of 0

Refresh Screen

Print Barcodes

Footer

Promotion Value: 0.0000 Clear Discount

Discount %: 0 Amt: 0.00

Service Month: November

Internal Contact: Acck Support

Pricing Analysis

Margin % 0.0000

Mark-up % 0.0000

Cost Ex VAT 0.0000

Profit 0.00

Total Selling

Sub Total 0.00

Less Discount 0.00

Ex VAT 0.00

VAT 0.00

Inc VAT 0.00

Deposit 0.00

1	Stock Type	Allows you to filter or apply actions to a specific type of stock (e.g. all items, stock items only, or non-stock items). This ensures changes are applied only where needed.
2	Update Value	Determines whether pricing updates are applied including or excluding VAT . This is important for maintaining accurate pricing calculations depending on how your system is set up.
3	Rounding Up	Controls how pricing values are rounded: • Round Up or Round Down • Or choose No Rounding This ensures your final pricing is clean and consistent (e.g. avoiding uneven decimal values)

4	Rounding Down	Controls how pricing values are rounded: • Round Up or Round Down • Or choose No Rounding This ensures your final pricing is clean and consistent (e.g. avoiding uneven decimal values)
5	Mark-Up %	Enter the desired markup percentage to apply to selected line items. This is used to calculate selling prices based on cost.
6	Set Mark-Up %	Applies the entered markup percentage across selected items. This is a quick way to update pricing in bulk.
7	Remove Lines	Removes selected line items from the quote. Useful for cleaning up or adjusting the quote quickly.
8	Zero Sell, Price	Sets the selling price to zero for selected items. This may be used for complimentary items, warranty replacements, or no-charge components.
9	Incl. Cost on Reports	When enabled, this includes cost values in reports , allowing for visibility of margins and profitability.
10	Attach Specs to Email	Tick this option to include product specifications when emailing the quote to the customer.
11	Set to Supplier Costs	Updates selected items so their pricing reflects the supplier cost directly. Useful when recalculating pricing based on updated supplier pricing.
12	Update Labour Cost	Refreshes or updates the labour cost values associated with the quote.
13	Set to System cost	Resets pricing to the system's default cost values , ensuring consistency with your pricing database.
14	Set Sell Price	Allows you to manually set or update the selling price for selected items.

15	Paging	When dealing with many line items: • Paging enabled: view all items in one continuous scroll • Paging disabled: items are divided across multiple pages This improves navigation depending on your preference.
16	Dimension	
17	Show/Hide	Allows you to customise the screen view by showing or hiding certain fields or sections, helping keep the interface clean and relevant.

Docs Tab

This tab displays a list of all **documents that have been attached to the quote**. These could include files such as specifications, images, PDFs, or any supporting documentation relevant to the job.

This tab provides **instant access to upload documents in any format (PDF, Word, Excel, etc.)** or retrieve **relevant files previously attached** to this quote.

Each document listed will typically show details such as:

- **Document name or number**
- **Type of document**
- **Description**
- **Date created**
- **User who uploaded it**

Key Functions

- **Attachments (top left button)**
Allows you to **add new documents** to the quote. This is where you upload files that need to be linked or sent with the job or quote.
- **Add / Open / Print / Remove**
These options allow you to:
 - **Add** new documents
 - **Open** existing attachments
 - **Print** attached files
 - **Remove** documents if they are no longer required

Attachments

Memo

Create Reminder

Quote History

Info

Functions

Import

Approval Options

Quote

Quote Detail

Address

Extras

Link

Shipping

Action

Docs

Cus

Page 0 of 0

Add

Open

Print

Remove

No data to display

#	Doc No	Company	Status	Doc Date	Type	Description	Created By	Date Time

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: November

Internal Contact: Acck Support

Pricing Analysis

Margin %

Mark-up %

Cost Ex VAT

Profit

0.0000

0.0000

0.0000

0.00

Total

Selling

Sub Total

Less Discount

Ex VAT

VAT

Inc VAT

Deposit

0.00

0.00

0.00

0.00

0.00

0.00

0.00

Adding Stock Items to Quote

This screen is used to add a stock item to a quote, define pricing, quantities, and control how the item is handled for the job, invoicing, and reporting.

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:	☐	
Description:	00-1000 - African Daisy Seed - Stk - 45.0000						
Item Group:	00-1005 - Balloon Flowers Seed - Stk - 10.0000						
Qty:	0852738006003 - flash - Stk - 10.0000						
	10-1000 - African Daisy 10cm High Plant - Stk - 32.0000						
	10-1005 - Balloon Flowers 10cm High Plant - Stk - 10.0000						
Pricing Structure:	22249800101 - PE35/8.795 coated paper 35/8 gsm 482kg - Stk - 6.0000						
Selling Ex VAT:	22249800102 - PE35/8.795 coated paper 35/8 gsm 481kg - Stk - 10.0000						
Selling Inc VAT:	22249800103 - PE35/8.795 coated paper 35/8 gsm 482kg - Stk - 10.0000						
Sub Total Selling:	22249800201 - PE35/8.795 coated paper 35/8 gsm 488kg - Stk - 10.0000						
VAT Value:	22249800202 - PE35/8.795 coated paper 35/8 gsm 489kg - Stk - 10.0000						
Total Selling:	22249800203 - PE35/8.795 coated paper 35/8 gsm 488kg - Stk - 10.0000						
Line Reference:	22249800301 - PE35/8.795 coated paper 35/8 gsm 490kg - Stk - 10.0000						
Sequence No:	22249800302 - PE35/8.795 coated paper 35/8 gsm 490kg - Stk - 10.0000						
Page 1 of 3							
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:	Dealer				
Region:		Project:					
Days from Start:		Employee Assigned:					
Lead Time:							
Order Date: 2025-10-31							
Reminder Date: 2025-10-31							
Required Date: 2025-10-31							
Supplier: Add							
Drop Ship: ☐ RFQ: ☐							
PO Qty:							
Item Cost:							
Item Code:							
Supp. Discount:							
Last Updated:							
Latest Cost: Copy							
Last Updated By:							
Internal Note:							
Qty On Sales Orders: 0 Detail							
Qty on SO Confirm / WHS: 0 Detail							
Save & New Save & Close Close Update Cost							

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:
5
MAST - Master Warehouse

Pricing Structure:
Default

Selling Ex VAT:
6
26

Selling Inc VAT:
7
29.9

Sub Total Selling:
8
182.00

VAT Value:
9
27.30

Total Selling:
10
209.30

Line Reference:
11

Sequence No:
12
1.0000

Zero Cost On Job:
21
Zero Cost On Invoice:
22

Build Selection:
Division:
25
Region:
26
Days from Start:
27
0

UOM Type:
13
UOM:
14

Line Discount:
15
0.0000
26.00

VAT Type:
16
01 Invoice GST:15

Mark-up %:
17
30.00

Cost Per Unit:
18
20.0000

Profit Cost / Unit:
19
6.0000

Total Cost:
20
140.0000

Show In Print:
23
Flag for Report:
24

Weight Per Unit:
28
0
T/W:
0.0000

Sales Rep:
29
Dealer

Project:
30
Employee Assigned:
31

Lead Time:
32
Order Date:
33
2025-10-31

Reminder Date:
34
2025-10-31
Reminder

Required Date:
35
2025-10-31

Supplier:
36
Rectron
Add

Drop Ship:
37
RFQ:
38

PO Qty:
39
0

Item Cost:
40
NZD
20.0000

Item Code:
41
Drink bottle

Supp. Discount:
42
0.0000%
20.0000

Last Updated:
43
2025-03-22 21:24:48

Latest Cost:
44
20.00
Copy

Last Updated By:
System Process

Internal Note:
45

Qty On Sales Orders:
Detail

Qty on SO Confirm / WHS:
Detail

Save & New
Save & Close
Close

Update Cost

Item & Quantity Details

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
Manage Qty on Job	Controls whether the quantity is actively tracked and managed when the quote is converted to a job.
Warehouse	Select the Warehouse you wish to sell this item form

Pricing

Selling Ex GST	Price per item does not include the 15% Goods and Services Tax. You add GST on top of the listed amount.
Selling Inc GST	Price per item includes the 15% Goods and Services Tax. The GST is already built into the total amount shown.
Sub Total Selling	Total price of total quantity of item that does not include the 15% Goods and Services Tax. You add GST on top of the listed amount.

VAT (GST) Value	Total GST only on total quantity of items
Selling Total	Total price of total quantity of item includes the 15% Goods and Services Tax. The GST is already built into the total amount shown.

Line Details

Line Reference	
Sequence No.	You can change the Sequence in the quote for this item

Units & Discounts

UOM Type	These are custom configuration settings applied during setup, tailored specifically to your product formats (e.g., Per Roll, Per Unit, Pack).
UOM	These are custom configuration settings applied during setup, tailored specifically to your product formats (e.g., 1000 per roll, 6 per pack).
Line Discount	You can apply a discount to this item
VAT (GST)Type	If this item is GST exempt or a Non-GST item it can be changed here

Margin & Costing

Mark up %	At this stage you can increase your profit %
Cost Per Unit	This is the total cost to produce or buy one item. It helps you set prices and track profitability.
Profit Cost/Unit	This is how much profit you make on each item sold after subtracting its cost.
Total Cost	This s the full amount spent to produce or purchase a set of items or complete a job.

Cost Behaviour

Zero Cost on Job	These ticks will be automatically on or off based on the setup if the item. When the item is promoted to a Job, its initial cost is cleared and recalculated progressively as the job is built—ensuring you have an accurate final cost at completion.
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Zero Cost on Invoice	As with the Cost on job, these ticks will be automatically on or off based on the setup if the item. When the item is promoted to a Job, its initial cost is cleared and recalculated progressively as the job is built—ensuring you have an accurate final cost at completion.
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Visibility & Reporting

Show on Print	
Flag for Report	

Organisation & Scheduling

Division	Select a division within of a company that focuses on one area of work.
Region	Select a region the job will fall under, it can include multiple cities or towns and often has its own local government or identity.
Days from Start	Use this field to schedule when this item should begin—set as a number of days from the job's start date.
Weight Per Unit	This is determined at setup

People & Projects

Sales Rep	You are able to allocate someone who promotes and sells a company's products or services to customers. They often handle quotes, follow-ups, and customer relationships, helping drive revenue and build trust.
Project	You can Link a quote to a specific project
Employee Assigned	Refers to the specific person responsible for completing a task or project. It helps track accountability, scheduling, and communication.

Dates & Supplier Info

Lead Time	This is the amount of time between starting a process and completing it. It usually refers to how long it takes from placing an order to receiving the goods or service.
Order Date	This is the day a customer places an order for goods or services.
Reminder Date	This is the day you plan to check in after sending the quote.

Required Date	This is the day the customer wants the goods or service delivered
Supplier	This is the company that provides goods or services to another business

Purchasing Options

Drop Ship	Ticking this box enables you to generate a Purchase Order on the fly—complete with all relevant details, so you don't need to build one from scratch when drop-shipping an item.
RFQ (Request for Quote)	Ticking this box allows you to generate a Request for Quote on the fly—pre-filled with all relevant details, so you don't need to start from scratch when requesting updated pricing for an item.
PO Qty	Enter the quantity here for which you want to generate a Purchase Order or Request for Quote.

Supplier Costing

Item Cost	This shows the actual cost of the item
Item Code	This is the suppliers item code
Supplier Discount	Shows if you received a discount on this item when purchased from supplier
Last Updated	This is the date the cost was last updated for this item
Latest Cost	Similar to Item cost, this shows the actual cost of the item at that date

Internal Notes

Internal Note	Use this field to add private comments or internal details related to the job, quote, or project. These notes are for internal use only and are not visible to the customer , making it ideal for internal communication and instructions.
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Approve Quote to Job

Quotes must go through approval stages to ensure they are reviewed internally and accepted by the customer before being converted into 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: Ack Support

Pricing Analysis

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

Internal Approval

This stage is for internal review and sign-off.

It ensures pricing, margins, and job details are checked and approved within the business before sending to the customer.

Customer Approval

Once internally approved, the quote is provided to the customer for acceptance.

This confirms the customer agrees to the scope, pricing, and terms.

Approve to Job

After customer approval, selecting **“Approve to Job”** converts the quote into an active job.

The job is then available in **Manage Job** and becomes part of the live workload.

Approved to job

Approve Quote To Job

Quote - Approval

Job Details

BOM Create

1 Quote Number: QT298

5 Quote Date: 2025-10-31

2 Customer: Barcode

6 Branch: HSOF

3 Description: Sales

7 Order Number: 12587

4 Long Description:

Team: 8 Team 1

17 Allow To Exceed Quote Value: ☒

Employee: 9 All

18 Allow To Exceed Budget Qty: ☒

Department: 10 All

19 Activate Report Dates: ☒

Function: 11 All

20 Use Build Task Defaults: ☐

Est Start Date: 12 2025-11-04 Hrs: 1

21 Charge Up (SC): ☐

25 Assembly: ☐

Group Activity: 13

22 Prepriced (CTC): ☐

26 Lock Employee: ☐

14 Completion Date: 2025-11-07

23 Warehouse: MAST - Master Warehouse

15 Delivery Date: 2025-11-07

24 Job Link:

16 Create PO Drop Ship: ☐

Continue Close

Service Card

1	Quote Number	This is the Quote number linked
2	Customer	Customers Name
3	Description	This will be specific to the Job as an easy identifier in a list
4	Long Description	Here you can be more specific to the job
5	Quote Date	This is the date of the Quote
6	Branch	You can select a specific branch that this is linked to if you had these set up at the start
7	Order Number	Customer Order Number
8	Team	You can select a team if these have been setup

9	Employee	Refers to the specific person responsible for completing a task or project. It helps track accountability, scheduling, and communication.
10	Department	Add a department if this has been setup for your company
11	Function	
12	Est Start Date	Date estimated for Job to start
13	Group Activity	
14	Completion Date	Date Estimated for Job to be completed
15	Delivery Date	Date that the item is expected to be delivered to your customer
16	Create PO Drop Ship	This is to allow you to create a PO from the Job once its started.
17	Allow to Exceed Quote Value	Ticking this box allows actual job costs to exceed the quoted value. This is helpful when unexpected expenses arise during production or service delivery, and you want the system to continue tracking costs without treating the quote as a strict limit. If left unticked, a new quote must be created to include any additional costs.
18	Allow to Exceed Budget Qty	Ticking this box allows the actual quantity used in the job to exceed the budgeted amount. This is useful when additional units are required during production or service delivery. If left unticked, you'll need to produce a new quote to add more units.
19	Activate Report Dates	This will allow you to be able to report on this job
20	Use Build Task Defaults	When you create a build task default, you can specify alternative warehouses or item sources. Once a quote is converted into a job, the system will apply the defaults set in your build template. This ensures that materials are drawn from the designated warehouse rather than the main warehouse, allowing for more precise inventory control—especially when working with a master warehouse setup.

21	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.
22	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) '
23	Warehouse	All stock will come from the Warehouse selected here
24	Job Link	You may find that you already have a job for this customer, and this is a sub job, to can select this job form the drop-down menu link to two or more jobs.
25	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.
26	Lock Employee	You can lock the employee assigned to this job so it cannot be changed without your knowledge.

Revision #18

Created 12 June 2026 04:30:27 by Pamela

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