

# Quote Item Screen

## Additional options on a Quote Item

This screen also allows you to capture key information for each job or task line.

Edit Quote Item

QTY: 18

Quote Item

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

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

Build Selection:

Division: 25

Region: 26

Days from Start: 27 0

Manage Qty On Job: 4

Warehouse: 5 MAST - Master Warehouse

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

Zero Cost On Invoice: 22

Show In Print: 23

Weight Per Unit: 28 0

Sales Rep: 29 Dealer

Project: 30

Employee Assigned: 31

Tasks:

Lead Time: 32

Order Date: 33 2025-10-31

Reminder Date: 34 2025-10-31

Required Date: 35 2025-10-31

Supplier: 36 Rectron

Drop Ship: 37

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

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

|   |                   |                                                               |
|---|-------------------|---------------------------------------------------------------|
| 1 | Stock Item        | Select your <b>stock item</b> from the drop-down menu         |
| 2 | Description       | At this stage you can change the <b>Description</b> if needed |
| 3 | Qty               | Add the <b>Quantity</b> you require of this item              |
| 4 | Manage Qty on Job |                                                               |

|    |                          |                                                                                                                                                |
|----|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| 5  | <b>Warehouse</b>         | Select the <b>Warehouse</b> you wish to sell this item form                                                                                    |
| 6  | <b>Selling Ex GST</b>    | Price per item does <b>not include</b> the 15% Goods and Services Tax. You add GST on top of the listed amount.                                |
| 7  | <b>Selling Inc GST</b>   | Price per item <b>includes</b> the 15% Goods and Services Tax. The GST is already built into the total amount shown.                           |
| 8  | <b>Sub Total Selling</b> | Total price of total quantity of item that does <b>not include</b> the 15% Goods and Services Tax. You add GST on top of the listed amount.    |
| 9  | <b>VAT (GST) Value</b>   | Total GST only on total quantity of items                                                                                                      |
| 10 | <b>Selling Total</b>     | Total price of total quantity of item <b>includes</b> the 15% Goods and Services Tax. The GST is already built into the total amount shown.    |
| 11 | <b>Line Reference</b>    |                                                                                                                                                |
| 12 | <b>Sequence No.</b>      | You can change the Sequence in the quote for this item                                                                                         |
| 13 | <b>UOM Type</b>          | These are custom configuration settings applied during setup, tailored specifically to your product formats (e.g., Per Roll, Per Unit, Pack).  |
| 14 | <b>UOM</b>               | These are custom configuration settings applied during setup, tailored specifically to your product formats (e.g., 1000 per roll, 6 per pack). |
| 15 | <b>Line Discount</b>     | You can apply a discount to this item                                                                                                          |
| 16 | <b>VAT (GST)Type</b>     | If this item is GST exempt or a Non-GST item it can be changed here                                                                            |
| 17 | <b>Mark up %</b>         | At this stage you can increase your <b>profit %</b>                                                                                            |
| 18 | <b>Cost Per Unit</b>     | This is the <b>total cost</b> to produce or buy one item. It helps you set prices and track profitability.                                     |
| 19 | <b>Profit Cost/Unit</b>  | This is <b>how much profit</b> you make on each item sold after subtracting its cost.                                                          |
| 20 | <b>Total Cost</b>        | This s the <b>full amount spent</b> to produce or purchase a set of items or complete a job.                                                   |

|    |                             |                                                                                                                                                                                                                                                                                 |
|----|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 21 | <b>Zero Cost on Job</b>     | 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.                          |
| 22 | <b>Zero Cost on Invoice</b> | 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. |
| 23 | <b>Show on Print</b>        |                                                                                                                                                                                                                                                                                 |
| 24 | <b>Flag for Report</b>      |                                                                                                                                                                                                                                                                                 |
| 25 | <b>Division</b>             | Select a <b>division</b> within of a company that focuses on one area of work.                                                                                                                                                                                                  |
| 26 | <b>Region</b>               | Select a <b>region</b> the job will fall under, it can include multiple cities or towns and often has its own local government or identity.                                                                                                                                     |
| 27 | <b>Days from Start</b>      | Use this field to schedule when this item should begin—set as a number of days from the job’s start date.                                                                                                                                                                       |
| 28 | <b>Weight Per Unit</b>      | This is determined at setup                                                                                                                                                                                                                                                     |
| 29 | <b>Sales Rep</b>            | 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.                                                                 |
| 30 | <b>Project</b>              | You can Link a quote to a specific project                                                                                                                                                                                                                                      |
| 31 | <b>Employee Assigned</b>    | Refers to the specific person responsible for completing a task or project. It helps track accountability, scheduling, and communication.                                                                                                                                       |
| 32 | <b>Lead Time</b>            | 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.                                                                                                        |
| 33 | <b>Order Date</b>           | This is the day a customer places an order for goods or services.                                                                                                                                                                                                               |

|    |                                |                                                                                                                                                                                                   |
|----|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 34 | <b>Reminder Date</b>           | This is the day you plan to check in after sending the quote.                                                                                                                                     |
| 35 | <b>Required Date</b>           | This is the day the customer wants the goods or service delivered                                                                                                                                 |
| 36 | <b>Supplier</b>                | This is the company that provides goods or services to another business                                                                                                                           |
| 37 | <b>Drop Ship</b>               | 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.                  |
| 38 | <b>RFQ (Request for Quote)</b> | 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. |
| 39 | <b>PO Qty</b>                  | Enter the quantity here for which you want to generate a Purchase Order or Request for Quote.                                                                                                     |
| 40 | <b>Item Cost</b>               | This shows the actual cost of the item                                                                                                                                                            |
| 41 | <b>Item Code</b>               | This is the suppliers item code                                                                                                                                                                   |
| 42 | <b>Supplier Discount</b>       | Shows if you received a discount on this item when purchased from supplier                                                                                                                        |
| 43 | <b>Last Updated</b>            | This is the date the cost was last updated for this item                                                                                                                                          |
| 44 | <b>Latest Cost</b>             | Similar to Item cost, this shows the actual cost of the item at that date                                                                                                                         |
| 45 | <b>Internal Note</b>           | Here you can include private comment or detail added to a job, quote, or project that's meant for your team, not the customer.                                                                    |

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