

Quote Screen

Extras Tab

AttachmentsMemoCreate ReminderQuote HistoryInfoFunctionsImportApproval Options

Quote

Quote DetailAddressExtrasLinkShippingActionDocsCus

Job No.:18Assign JN

Completion Date:22025-11-14

Asset Item:3

Customer Status:4

Assembly:510Print Custom Fields:13Quote Total DescriptionQuote Estimate16

Charge Up (SC):611Manage Qty On Job:14Sales Lead:17Probability:0%

Prepriced (CTC):712Exclude From Reports:15Sales Lead Follow Up Date:

SaveClosePrint QuoteJob CardService CardT & Cs

Items18

Page 0 of 018PagingAddNoteEditDeleteQuick AddBarcode Printing1920

#Line RefSeq. NoLSStatusTypeCodeDescriptionUnit Sale

Promotion Value:Clear Discount

Discount %:0.00Amt:0.00

Service Month:November

Internal Contact:Acck Support

Pricing Analysis

Margin %Mark-up %Cost Ex VATProfit

TotalSelling

Sub TotalLess DiscountEx VATVATInc VATDeposit

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	

4	Customer Status	
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	
11	Manage Qty on Job	
12	Exclude from Reports	
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	

Link Tab

Quote

Customer Link: 1 | 8 Deposit Paid: ☐ 9 Deposit Amount: 10 Deposit Date:

Address Type: 2 |

Address Line 1: 3 |

Address Line 2: 4 |

Address Line 3: 5 |

Address Line 4: 6 |

Address Code: 7 |

Save Deposit

Save

Close

Print Quote

Job Card

Service Card

T & Cs

Items

Page 0 of 0

Refresh Screen

Print Barcodes

Footer

Promotion Value: Clear Discount

Discount %: 0.00 Amt: 0.00

Service Month: November

Internal Contact: Acck Support

Pricing Analysis

Margin % undefined

Mark-up % undefined

Cost Ex VAT undefined

Profit undefined

Total

Selling

Sub Total

Less Discount

Ex VAT

VAT

Inc VAT

Deposit

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	
3-6	Address line 1-4	
7	Address code	
8	Deposit Paid	If a customer has paid a deposit, this can be added to the quote and taken off of the total cost of the job.

9	Deposit Amount	
10	Deposit Date	
11	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.
12	Dimension	
13	Show/Hide	

2	Shipping Date	
3	Send Email	
4	Shipping Location	
5	Internal Delivery	
6	Delivery Company	
7	Tracking Number	
8	Frozen	
9	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.
10	Dimension	
11	Show/Hide	

Action Tab

Print Barcodes

1	Stock Type	
2	Update Value	
3	Rounding	
4	Rounding	
5	Mark-Up %	
6	Set Mark-Up %	
7	Remove Lines	
8	Zero Sell, Price	
9	Incl. Cost on Reports	
10	Attach Specs to Email	

11	Set to Supplier Costs	
12	Update Labour Cost	
13	Set to System cost	
14	Set Sell Price	
15	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.
16	Dimension	
17	Show/Hide	

Docs Tab

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

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 %	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

Revision #1

Created 3 June 2026 21:14:23 by Pamela

Updated 12 June 2026 21:14:02 by Pamela