

# Sales Quotation

*Sales and marketing > Common > Sales quotations > All quotations*

**Summary** Send quotations to a Customer or Prospect to confirm pricing and other terms before processing an order. A quotation can be converted into a Sales order once an agreement is reached.

**Steps**

1. Create a Quotation
2. Enter Quotation lines
3. Send Quotation
4. Confirm to Sales order

**Tips**

- Quotations can be used to communicate a price list for new Customers

# Create a Quotation

- Click the new **Sales quotation** button.
- Choose **Account type** Customer.
- Select the **Customer account**.
- Click **OK**.

# Enter Quotation lines

- Choose the **Item number**.
- Enter **Quantity** of items.

Sales quotation (1 - ceu) - Quotation: QA-100082, Pear, Inc., Quotation type: Sales quotation

File Sales quotation Quotation Follow up General

Maintain charges Charges Sales tax Tax Multiline discount Total discount Calculate Send quotation Generate Price simulation Analysis Customer Prospect Prices Accounts Quotation journal Quotation confirmation journal Journals

QA-100082 : Customer 1000 - Pear, Inc. Created Latest sales q... Latest sales or... Related infor...

► Sales quotation header

Lines

Add line Add lines Remove Sales quotation line Inventory Product and supply Update line

Type	Item number	Product name	Sales category	Quantity	Unit	Unit price	Discount	Disco...	Net amount
	20008	Speakers / Speakers		10.00	ea	20.00			200.00

► Line details

Line discount in amount per price unit. (0) USD ceu Close

**Interactive 2.1** Quotation Lines

Sales quotation (1 - ceu) - Quotation: QA-100082, Pear, Inc., Quotation type: Sales quotation

File Sales quotation Quotation Follow up General

Maintain charges Sales tax Multiline discount Total discount Send quotation Generate Price simulation Analysis Customer Prospect Prices Quotation journal Quotation confirmation journal

QA-100082 : Customer 1000 - Pear, Inc. Created

Sales quotation header

Lines

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Line details

Line discount in amount per price unit. (0) USD ceu Close

**Movie 2.1** Sales Quotation

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Search

Sales quotation (1 - ceu) - Quotation: QA-100084, Pear, Inc., Quotation type: Sales quotation

File Sales quotation Quotation Follow up General

Sales quotation New Edit Delete Header view Line view From all Totals Attachments

QA-100084 : Customer 1000 - Pear, Inc. Created Latest sales q... Latest sales or... Related infor...

Sales quotation header

Lines

Add line Add lines Remove Sales quotation line Inventory Product and supply Update line

Type	Item number	Product name	Sales category	Quantity	Unit	Unit price	Discount	Disco...	Net amount
	9027	iPad - 64GB - White	Tablets	2.00	Pcs	899.00			1,798.00

Line details

Unit the item is sold in.

USD ceu

# Send Quotation

- On the **Quotation tab**, click the **Send quotation button**.
- Mark **Print quotation**.
- Click **OK**.

Send quotation (1 - ceu)

Parameters Other

**Late selection** **Print options**

Late selection: ☐ **Print quotation:** ☒

Use print management destination: ☐

Select Options

Overview Setup Lines Quotation

**Delete**

Quotation	Prospect	Customer account	Name	Currency
QA-100082		1000	Pear, Inc.	USD

OK Cancel Batch

Make the selection of data later in the process.



## Confirm to Sales order

- On the **Follow up** tab, click **Confirm**.
- Click **OK**.

Confirm quotation (1 - ceu)

Parameters Other

**Reason**

Reason:

**Late selection**

Late selection: ☐

**Print options**

Print confirmation: ☐

Use print management destination: ☐

Select

Options

Overview Setup Lines Quotation

☒ Delete

Quotation	Prospect	Customer account	Name	Currency
QA-100082	1000	Pear, Inc.	USD	

OK Cancel Batch

Quotation ID