

Quotations

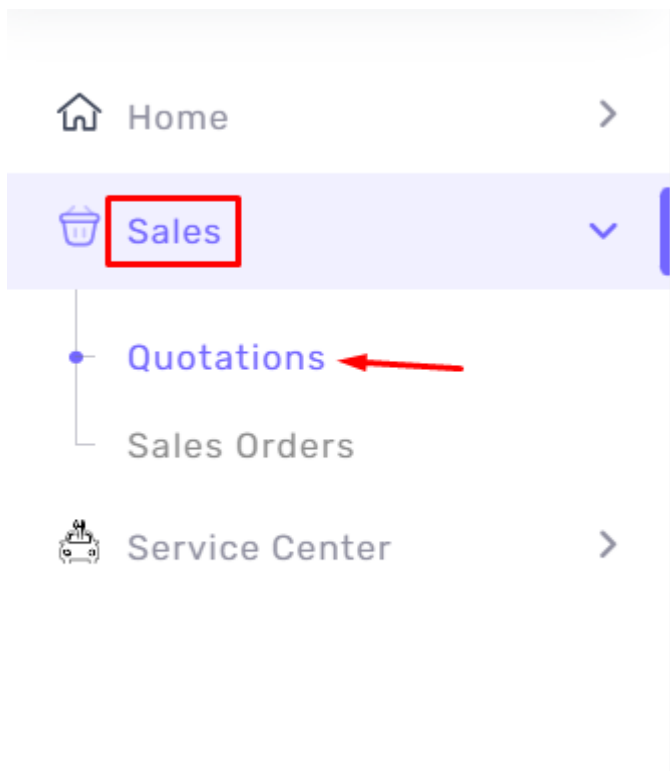
- [Create Quotations](#)

Create Quotations

Create Quotations has been updated to improve quotation management and provide better control over customer details, quotation items, quantities, prices, taxes, and discounts. It also makes it easier to track quotation status, manage sales offers, and maintain accurate and organized records for better follow-up and decision-making.

Find Quotations

From the menu **Sales → Quotations**, you can search quotations, view quotation details, and **create a new quotation**



Add New Quotation

Click **Add New Quotation** to create a new quotation for a customer and enter the required quotation details.

Quotations

Home / Quotations / Quotations

Search Quotations

QU ID

SOLD

Job Cards

Part Number

Part Number

Branch

Order By

QU ID

Order Direction

Descending

Date Field

Create Date

Date Condition

Between

Date & Time Range From

yyyy-mm-dd

12:00 AM

Date & Time Range To

yyyy-mm-dd

11:59 PM

Limit

100

Add New Quotation

Search

Creating Quotation

- Select **Customer ID** from the dropdown list to choose the customer you want to create the Sales Order for.
- Select **CUR** to choose the transaction currency, such as **USD, EUR, or SAR**.
- Enter **XR** (Exchange Rate) if the selected currency is different from the company’s main currency.
- Make sure all required fields marked with a red asterisk (*) are completed.
- Click **Create Quotation** to save the order and continue to the next step.

Creating Quotations

Customer

Quotation

Quotation Items

Upload File

Payment

Shipping

Notes

Customer ID *

CUR *

XR *

Print

Create Quotation

Example Creating Sales Order

Creating Quotations

Customer Quotation Quotation Items Upload File Payment Shipping Notes

Customer ID * 1874# mansor table CUR USD XR 1000

Print Create Quotation

Next Step :

This is a confirmation message from the system.
It asks if you want to create a new Quotation.

Click **Yes** to continue.
Click **No** to cancel.

Add New

+

Add New

Are you sure you want to add a new Quotation?

Yes No

Quotation

- Check **Order Details** to review the customer name, order number, and invoice type.
- Check **Financials** to review currency, exchange rate, discount, tax, and total amount.
- Check **Administration & Sales** to review salesman, branch, bank, and created by details.

- Check **Logistics & Notes** to review shipping terms and any notes.
- Check **Approved** to see if the order is approved or still pending.
- Click **Print** if you want to print or save a copy of the Sales Order.
- Update any required information if changes are needed.
- Click **Update Sales Order** to save all changes.

Creating Quotations

Customer Quotation Quotation Items Upload File Payment Shipping Notes

Invoice Type Standard

SOLD 0

Customer ID 1874

XR 1000.000000

Update Date

Updated By ID 0

Count Items

Bank

QU ID 5026

Customer TAX Type Personal

Customer Name mansor table

TAX Type IVA (0%)

Created By ID 1862

Notes

TAX

Job Cards 0

Discount Type Percentage

CUR USD

Create Date 2026-04-25 16:01:52

Created By Hamza Taj Alden

Print Notes

Total Amount 0

Print Update Quotation

Quotation Items

- Click **Part Code / Part Number** to choose the item you want to add. You can select it from the list or use the search icon to find the item.
- Enter **Note** to add any comments or additional details for the quotation.
- Enter **Skip TAX** if you want to exclude tax from this item.
- Enter **Discount** if you want to give a discount for that item.
- The system will automatically calculate:
 - **Available QTY** – Current stock quantity available
 - **Unit Price** – Item price from the system
 - **Subtotal** – Quantity × Unit Price
 - **Net Amount** – Price after discount
 - **Tax** – Tax amount for the item
 - **Gross Amount** – Final total for that row
 - **Grand Total** – Total amount for all items
- Click **+ Add Rows** if you want to add more items.
- Click **Save** to save the entered items.
- Click **Delete** if you want to remove an item row.
- Click **Create Sales Order** to create a new sales order for the customer and enter the required order details.
- **Export** means taking the data you see on the screen and saving it into an external file (usually an Excel or PDF file or Copy).

Creating Quotations

Customer

Quotation

Quotation Items

Upload File

Payment

Shipping

Notes

Save

Delete 0

+ Create Sales Order

1

+ Add Rows

Export

Part Number	Description	Notes	Skip TAX	TAX	Available QTY	QTY	Unit Price	Subtotal	Discount	Net Amount	TAX	Gross Amount
Part Code												
Part Code												
Part Code												
Part Code												
Part Code												

Total Rows: 0

Grand Total: -

Save

Delete 0

+ Create Sales Order

Reset

Example Quotation Items

Creating Quotations

Customer

Quotation

Quotation Items

Upload File

Payment

Shipping

Notes

Save

Delete 0

+ Create Sales Order

1

+ Add Rows

Export

Part Number	Description	Notes	Skip TAX	TAX	Available QTY	QTY	Unit Price	Subtotal	Discount	Net Amount	TAX	Gross Amount
Suzuki Spare Parts - ECSTAR CAR POLISH	Suzuki Spare Parts - ECSTAR CAR POLISH		No		75	1	15464.95	15464.95	10	2165.09		
Part Code												
Part Code												
Part Code												
Part Code												

Total Rows: 0

Grand Total: -

Save

Delete 0

+ Create Sales Order

Reset

Creating Quotations

Customer

Quotation

Quotation Items

Upload File

Payment

Shipping

Notes

Save

Delete 0

+ Create Sales Order

1

+ Add Rows

Export

Part Number	Description	Notes	Skip TAX	TAX	Available QTY	QTY	Unit Price	Subtotal	Discount %	Net Amount	TAX	Gross Amount
99030M999H2-310	ECSTAR CAR POLISH		No	14%	75	1	15464.95	15,464.95	0	15,464.95	2,165.09	17,630.04
Part Code												
Part Code												
Part Code												
Part Code												
Part Code												

Total Rows: 1

Grand Total: -

Save

Delete 0

+ Create Sales Order

Reset

Upload File

You have two options to add a new file

- You can click the **“Upload File”** tab
- use the **“Take Photo”** tab to capture an image using your device.
- Click the **“Browse Files”** button in the center of the screen. A window will open where you can select a document or image from your computer.
- Once the file is uploaded, it will appear in the list at the bottom.

- You will be able to see the file details such as:
Name (for example: steptwo.png), **ID** (the unique identification number), and **UUID** (the system-generated code for the file).

On the right side under Actions, you can manage the file using the **available buttons**:

- **View** to open and preview the file without downloading it.
- **Download** to save the file to your device.
- **Delete** to remove the file from the system.

The screenshot shows a web application interface for 'Quotations #5026'. At the top, there are tabs for 'Customer', 'Quotation', 'Quotation Items', 'Upload File' (which is active and highlighted with a red box), 'Payment', 'Shipping', and 'Notes'. Below the tabs, there are two buttons: 'Upload File' (highlighted with a red box) and 'Take Photo' (highlighted with a red box). A large dashed blue box contains a 'Browse Files' button (highlighted with a red box) and the text 'Optional custom content that replaces the the entire default content.' Below this, a table displays the details of uploaded files. The table has columns for 'Name', 'Id', 'Uuid', and 'Actions'. One row is visible with the file 'Screenshot_18.png', Id '4004', and Uuid 'ef9aefa1-2819-4e0e-95a4-5d38ce246eee'. The 'Actions' column for this row contains three buttons: 'View' (blue), 'Download' (green), and 'Delete' (red), all of which are highlighted with a red box. A red arrow points from the 'Optional custom content' text to the 'Upload File' button.

Name	Id	Uuid	Actions
Screenshot_18.png	4004	ef9aefa1-2819-4e0e-95a4-5d38ce246eee	View Download Delete

Search Quotations

- Enter **QU ID** to search for a specific quotation. You can type the number directly or use the search icon to find it.
- Enter **SO ID** to search for a specific sales order. You can type the number directly or use the search icon to find it.
- Enter **Job Cards** to search for orders linked to a job card. You can type the number directly or use the search icon to find it.
- Enter **Part Number** to search for orders containing a specific item. You can type the item code directly or use the search icon to find it.
- Choose **Branch** to filter results by branch location
- Select **Order By** to choose how the results will be sorted.
- Select **Order Direction** to set sorting order (Ascending or Descending).
- Choose **Date Field** to select which date type to search by.
Enter Date Condition to set the date filter (Equal, Between, Before, After).
- Enter **Date & Time Range From** and **Date & Time Range To** to search within a specific period.
- Enter **Limit** to define how many results you want to display.
- Click **Search** to show the matching results.

Search Quotations

QU ID

SOID

Job Cards

Part Number

Part Number

Branch

Order By

QU ID

Order Direction

Descending

Date Field

Create Date

Date Condition

Between

Date & Time Range From

yyyy-mm-dd

12:00 AM

Date & Time Range To

yyyy-mm-dd

11:59 PM

Limit

100

Add New Quotation

Search

Search results

- Click **QU ID** to open or move to the quotation details.
- Click **SO ID** to open or move to the sales order details.
- Click **Job Cards** to open or move to the job card details.

Quotations

Export

QU ID	Created By	Create Date	SOID	Customer Name	Job Cards	Count Items	SO Count Items
5026	Hamza Taj Alden	2026-04-25 16:01:52	5401	mansor table	-	Suzuki Spare Parts (1)	Suzuki Spare Parts (1)
5025	Hamza Taj Alden	2026-04-25 12:03:59	-	mansor table	-		
5024	Admin	2026-04-19 12:33:12	5398	customer name 12	1220		
5023	Admin	2026-04-12 09:18:26	5397	Customer7	-	Suzuki Spare Parts (3)	Suzuki Spare Parts (2)
5022	Admin	2026-04-12 09:16:23	-	Customer4	-		
5021	Admin	2026-04-12 09:06:35	-	Customer6	-		
5020	Admin	2026-04-12 09:01:53	-	Customer2	-		
5019	Admin	2026-04-12 08:24:56	-	Customer3	-	Suzuki Spare Parts (1)	
5018	Admin	2026-04-01 18:34:20	5394	GAUTAM BHAISHAKAR RAVAL	1130		
5017	Admin	2026-03-31 17:39:54	5393	FALCONS GT MOTORS, LDA - SURCURSAL EM ANGOLA	1188	Suzuki Spare Parts (1) SML Spare Parts (1) Cars Services (1)	Suzuki Spare Parts (1) SML Spare Parts (1) Cars Services (1)
5016	Admin	2026-03-31 17:37:59	5392	FALCONS GT MOTORS, LDA - SURCURSAL EM ANGOLA	1182		Suzuki Spare Parts (1) Cars Services (1)
5015	Admin	2026-03-31 17:36:49	-	FALCONS GT MOTORS, LDA - SURCURSAL EM ANGOLA	1190		
5014	Admin	2026-03-31 17:36:30	-	FALCONS GT MOTORS, LDA - SURCURSAL EM ANGOLA	1191		
5013	Admin	2026-03-31 17:35:44	-	FALCONS GT MOTORS, LDA - SURCURSAL EM ANGOLA			