

Sales Quotes Screen - User How To's

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Overview of the Sales Quotes Screen

'Quotes screen' is a comprehensive screen that stores and displays every significant information about a Quote transaction all on one screen. It is divided into four (4) main sections to organize data and functions:

Main Fields (section)

Bill To - The entity who will pay for the order.

Ship To - The entity who will receive the order.

Quotation # - Record numbering type can be set at **Settings>System>Record Numbering** as manual, sequential or date format.

Sales Order # - The Sales Order related to the Quote.

Expiration Date - Determines when the Quote expires.

Type of Quote

Warehouse - Where items will come from before delivery to customers.

Quote Date - The date the Quote was created.

Customer PO # - The Purchase Order # on the Customer's purchase document. (Optional) For document tracking purposes.

Entered By - Creator of the Quote.

Payment Terms - Payment terms and conditions you set as the seller. Pre-define your Payment Terms settings according to your company set conditions. **Go to Settings>Sales>General Sales**

Settings>Payment terms (section).

Sales Rep - The Sales Representative who communicated the sale.

Order Source - Where an order originated from.

Shipped Via - The shipping method.

Contact

Email

Job ID - The Job record related to the Quote.

Add/Edit Line Item (section)

Audit Log



icon - Lets you view all updates (and details) made on this section.

Gear



icon - Click to view all Column Filters on this section. You may check/uncheck to show/hide these fields.

Double Arrow Down



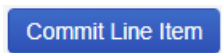
icon - Click to show Line 2 fields.

Double Arrow Up



icon - Click to hide Line 2 fields.

Commit Line Item



button - Click to validate and save any data input or changes on the Add/Edit Line Item table. This

button turns red when you need to do so.

Tabs (section) - *see below*.

Comments - Put any notes related to this quote.

Payment Info

Pictures

Custom Fields - Set your customized fields at **Settings** (gear icon, top right corner) > **Custom Fields**.

Related Back Orders

Other

Footer (section)

New (button) - To create a new Sales Quote record.

Delete (button) - To delete that Quote screen.

Refresh (button)

Create Sales Order (button) - To auto create Sales Order related to this quote.

Send Email (button) - To easily send email about this quote to your clients.

Print (button) - To print this quote. Can set needed print copies and various settings according to your requirements.

Follow Up (button)

Function (button)

Save (button) - To save the actions/changes made on that screen.

Help (button) - Leads you to self-help articles about the **Sales Order** screen.

Close (button) - To close that screen.

Sales Quotes Screen - Common Task

How to add a new customer on the Sales Quotes Screen

1. Beside the Bill to Company Name Field, click on the arrow down button and then it will show the list of existing customers.
2. At the bottom of that customer list, there is an option to add a new customer. Click on the +Add New button to add a new customer.
3. A pop up screen will appear and user would need to fill out the necessary information for the new customer.

1. On the Sales Quotes Screen, click on the arrow down button located beside the Ship to Company Name Field.

2. Click on the + Add New button to create a new customer.

The screenshot shows the 'Quotation' screen in the iPlace system. The 'Ship to' dropdown menu is open, and the '+ Add New' button is highlighted. The background shows a list of customers and a summary section on the right.

Customer	Name	Phone Number	Address Type	Customer Number
11 MOTORS			Both (Bill To ...)	8043
200			Both (Bill To ...)	2071
A & H AUTO REPAIR / A & H AUTO SALES	BAUTISTART		Both (Bill To ...)	281-591-7575
A & V ELITE MOTORS LLC			Both (Bill To ...)	281-785-1780
A PLUS AUTO			Both (Bill To ...)	1021
aaaaaa (deleted)			Both (Bill To ...)	1140
ABC Company		8889998899	Both (Bill To ...)	1121
ABC Customer	John Smith	8889998899	Both (Bill To ...)	2012
ABC AND V BODY SHOP			Both (Bill To ...)	8065
AJ & SE AUTO SALES			Both (Bill To ...)	833-494-4933
Alicia Chidester (deleted)			Both (Bill To ...)	1917
Alicia Chidester	Alicia Chidester	stfssstfda	Both (Bill To ...)	1917
Brad Jones	Brad Jones	8917484894	Both (Bill To ...)	1983

Quotation # Q250328-0001

Subtotal: \$0.00
Tax: \$0.00
Freight: \$0.00
Total: \$0.00

Fill out all the necessary details for the new customer.

The screenshot shows the 'Add New Customer or Prospects' form. The 'Save' button is highlighted with an orange circle. The form contains various fields for customer information, including company name, address, contact details, and payment terms.

Auto Fill Profile: 2090

Company Name: *
Address Type: Both (Bill To & Ship To)
Link To: *
Contact Name: Prefix, First Name, Last Name
Title: *

Address Info:
Address 1:
Address 2:
City: State / Province:
Zip / Postal Code: Region: Country:
Phone & Fax: Phone #: Ext: Fax #:
Email & Website: Company Email: Website:

Type: Customer
Sub Type:
Status:
Source:
Shipped Via: Truck 1
Delivery Fee: \$10.00
Warehouse: Main Warehouse
Sales Tax: UT-CEDAR CITY (6.2%)
Tax Exempt: ☒ Tax Resale #:
Payment Terms: Net 30
Payment Method:
Default Pricing Method: Discount
Discount (%):
Pricing Templates: Small Body Shops
Sales Rep:
Customer Service Rep:
Credit Days:
Credit Limit:

Sync with QuickBooks Online: ☒ **Save**

Click the Save button to Save the new customer record.

How to duplicate an existing quote

1. Open the quote you would like to duplicate.
2. On the Sales Quote Screen, click on the Duplicate Quote Button to create a duplicate of the quote. A new tab will open with the duplicate copy of the quote with its own Quotation #.

Click the Duplicate Quote button to duplicate an existing quote.

How to Edit 'Item Number' on the Quote screen.

- **Item # Field:** Type on this field the item # and an item list would be shown for the user to select from. If the user enters anything that won't match an existing item #, a prompt would appear asking the user if the system should search in other fields such as the description.
- **Arrow Down Button:** Click on this button to see the full list of items to select from. If it is a new item that is not on the list, a **+ add new button** can be clicked to create a new item.
- **X Button:** Click on this button to clear the existing item selected.
- **Magnifying Glass Button:** Click on this button to open the item details screen for the selected item.

NOTE: The permission to edit or make changes on a specific field is determined based on the role (security type) assigned to the user and set by the admin user of the account.

Type on the **Item # Field** the Item # and the item list would be shown for the user to select from.

Click on the **arrow down button** beside the Item # field to see the full list of items to select from.

Click on the **X button** to clear the existing item selected.

Click on the **magnifying glass button** to open the item details screen for the selected item.

How to Edit 'Item Description' on the Quote screen.

The description column can be edited by clicking on the item description allowing the user to add or remove any description.

NOTE: The permission to edit or make changes on a specific field is determined based on the role (security type) assigned to the user and set by the admin user of the account.

Click on the description of the item to edit/delete any details that needs to be added or removed.

How to Edit the Net Price of an Item on the Quote Screen

The Net Price can be edited by clicking on the net price of a specific line item you are working on.

The screenshot shows the 'iplace' Quotation interface. On the left is a sidebar with navigation links: Dashboard, Customers, Vendors, Items, Sales, AR, Purchasing, Warehouse, and Jobs. The main area is titled 'Quotation' and contains fields for 'Bill To' and 'Ship To' (both 'Test Customer 1'), 'Quotation # Q250328-0001', 'Sales Order #', 'Expiration Date 03/28/2025', 'Type Of Quote Quotation', and 'Warehouse Main Warehouse'. Below these are fields for 'Quote Date 03/29/2025', 'Customer PO #', 'Entered By Syron', 'Payment Terms Net 30', 'Sales Rep Syron', 'Order Source', 'Shipped Via Truck 1', 'Contact', 'Email', and 'Job ID'. The 'Add/Edit Line Item' table has columns: Action, Qty Ord, Item #, Description, PO #, List Price, Unit Price, Dis %, Net Price, Tax, and Line Total. The first row shows 'ACURA LEGEND 06-08 - Front bumper cover (4dr sedan, prime)' with a 'Net Price' of '\$0.00' highlighted by an orange box. An arrow points from this box to the text below.

Click on the Net Price to edit the net price of the line item.

How to Edit the Discount % of an Item on the Quote Screen

The Net Price can be edited by clicking on the Dis % (Discount %) of a specific line item you are working on.

This screenshot is similar to the first one but shows the 'Dis %' field highlighted with an orange box. The 'Dis %' value is '0.00%'. An arrow points from this box to the text below.

Click on the Discount Percentage field to edit the discount of the line item.

How to Delete a Line Item on the Quote Screen

A line item can be deleted by clicking on the X button below the action column. The user will then be asked to confirm the action through a pop up message that will appear. 'Yes' to proceed with deleting the item from the quote and 'No' to cancel the action.

Quotation

Bill To: Test Customer 1
Juan Dela Cruz
Test Customer 1
Test St.
Salt Lake Cit, Utah 84044

Ship To: Test Customer 1
Juan Dela Cruz
Test Customer 1
Test St.
Salt Lake Cit, Utah 84044

Quotation # Q250328-0001

Sales Order #
Expiration Date 03/28/2025
Type Of Quote Quotation
Warehouse Main Warehouse
☐ Tax Exempt

Quote Date 03/29/2025 Customer PO # Entered By Syron Payment Terms Net 30 Sales Rep Syron Order Source Shipped Via Truck 1 Contact Email Job ID

Action	Qty Ord	Item #	Description	PO #	List Price	Unit Price	Dis %	Net Price	Tax	Line Total
III X	1	AC1000107	ACURA LEGEND 86-88 - Front bumper cover (4dr sedan; prime)	Q	\$0.00	\$0.00	0.00%	\$0.00	☒	\$0.00
III X	1	AC1000101-X	ACURA VIGOR 93-94 - Front bumper cover (GS; prime)	Q	\$10.00	\$10.00	0.00%	\$10.00	☒	\$10.00
III X	0			Q					☐	

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[Commit Line Item](#)

To delete a line item, click on the X button below the action column of the line item you would like to delete. User would have to confirm the action with the pop up message that will appear as shown beside this text.

Are you sure you want to delete this line item?

[Yes](#) [No](#)

How to Delete a Quote on the Quote Screen

A quote can be deleted by clicking on the Delete button located at the lower left corner beside the New button.

Quotation

Bill To: Test Customer 1
Juan Dela Cruz
Test Customer 1
Test St.
Salt Lake Cit, Utah 84044

Ship To: Test Customer 1
Juan Dela Cruz
Test Customer 1
Test St.
Salt Lake Cit, Utah 84044

Quotation # Q250328-0001

Sales Order #
Expiration Date 03/28/2025
Type Of Quote Quotation
Warehouse Main Warehouse
☐ Tax Exempt

Quote Date 03/29/2025 Customer PO # Entered By Syron Payment Terms Net 30 Sales Rep Syron Order Source Shipped Via Truck 1 Contact Email Job ID

Action	Qty Ord	Item #	Description	PO #	List Price	Unit Price	Dis %	Net Price	Tax	Line Total
III X	1	AC1000101	ACURA VIGOR 93-94 - Front bumper cover (GS; prime)	Q	\$10.00	\$10.00	0.00%	\$10.00	☒	\$10.00
III X	1	AC1000106	ACURA LEGEND 91-92 - Front bumper cover (2dr coupe; LS)	Q	\$10.00	\$5.00	0.00%	\$5.00	☒	\$5.00
III X	0			Q					☐	

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[Commit Line Item](#)

Comments Custom Fields

Comments

Note: Quotations do NOT change inventory levels.

Subtotal \$15.00
Tax MAGNA (7.25%) \$1.09
Calc Tax Code
Freight \$10.00
Total \$26.09

[New](#) [Delete](#) [Refresh](#) [Duplicate Quote](#) [Create Sales Order](#) [Send Email](#) [Print](#) [Follow up](#) [Function](#) [Save](#) [Help](#) [Close](#)

To delete the quote, click on the DELETE button found at the lower left corner of the sales quote screen.

How to Print a Quote on the Quote Screen

1. To Print a Quote, click on the Print button on the lower right side of the quote screen.

To print a quote, click on the PRINT button found at the lower right side of the sales quote screen

2. The printing option will appear and will allow the user to select a quotation document template from the dropdown under the Document(s) to Print column. Each template has a pre-set print settings. To setup print settings, click on the gear icon. To proceed with the print preview of the document, click on the Preview button and follow the next prompts.

The printing option will appear afterward, allowing the user to select a quotation document template from the dropdown. Each template has pre-set print settings.

To setup print settings, click on the gear icon.

To preview the quotation and proceed with printing, click on the PREVIEW button and follow the next prompts.

The Print Settings will allow you customize the Logo, font formatting and which company and customer information are printed on the document. It has 3 sections: 1) the Header Print Properties which will customize the header of the document which contains the company and customer information. 2) the Detail Print Properties which will customize the details of the document (on this example the quote line items). The user can select will columns will be included on the printed document. 3) the Footer Print Properties which will customize any additional information such as the comments, total amount, date approved, payment details, approved by, and custom terms and conditions..

Print Settings			
Header Print Properties			
Company Print Settings		Customer Print Settings	
Display Logo	Yes	☒ Company Email	☒ Company Website
Company Name Font Size	12	☒ Company Phone	☒ Print Using Grayscale
Company Name Font Bold	No	☒ Bill To Company	☒ Ship To Company
Company Address Font Size	8		
Print Company Inches from Top	0.2		
Print Company Inches from Left	0.5		
		Customer Name Font Size	10
		Customer Name Font Bold	No
		Customer Address Font Size	8
		Print Customer Inches from Top	1.1
		Print Customer Inches from Left	0.5
		Print Ship To Inches from Left	0.5
		☒ Due Date	☒ Payment Terms
		☒ Entered By	☒ Customer PO#
		☐ Barcode	☐ Contact Name
		☐ Customer #	☐ Created By
		☒ Shipped Via	☐ Sales Rep
		☐ DeliveryDate	
Detail Print Properties			
Header Font Size	10	Item Number	0.75
Body Font Size	8	Qty Fields	0.25
Line Item Type	1 Line	Price Fields	0.50
		☒ Item #	☒ Qty Ordered
		☒ Tax	☐ List Price
		☐ Invoice Serial #	☐ Discount
		☐ Vendor Name	☒ Net Price
			☒ Line Total
Footer Print Properties			
☐ Comments		☐ Date Approved	☐ Approved By
☒ Total Amount		☐ Show Payment Details	☒ Custom Terms & Conditions
Note to Customer Font Size	8	Note to Customer	
Close		Save	