

Quotation screen - How To's

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There is no printed help available for this screen at this time. For help with with this screen please contact your dedicated support representative or send an email to support@onesourcesoftware.com.

Quotation Screen - Common Task

Multiple Ways to Create a New Quote

1. Create a New Quote using the + Menu Button

Click on the + Menu button to open the Add New Record screen. Then, click on Quotes to create a new quotation. You will then be directed to a new tab to create a quotation. **Shortcut:** Press Ctrl+F5 on your keyboard to create a new quotation.

Click the + Menu button to open the add new Record screen.

Click on **Quotes** to create a new quotation.

The screenshot displays the iPlace software dashboard. On the left, a sidebar contains a '+ Menu' button. An orange box highlights the 'Add New Record' menu, which lists various record types: Record Type, Short Cut, and New Tab. The 'Quote' option is highlighted with an orange box, and an arrow points from the text 'Click on Quotes to create a new quotation.' to it. The main dashboard area includes several widgets: 'Total Customers: 199', 'Total Quotes: 242', 'Total Sales Orders: 1670', 'Total Invoices / Credits: 1014 / 257', 'Total Items: 119493', and 'Total PO's: 685'. Below these are charts for 'My Open Orders' and 'Total Invoices Last 15 Days'. At the bottom, there are tables for 'Sales (Quotes)' and 'Sales (Orders)', and a 'Customers added this year' section.

2. Create a New Quote on the Quotation List Screen

Click on the Sales Menu to see sales related screens. Then click on Quotes to open see the quotation list. On the lower left corner, click the New button to create a new quotation.

1. Click on the Sales Menu

2. Click on Quotes menu to open the Quotation List screen

Quotation List

Quote Number	Sales Order Num	Quote Date	Customer	Quote Total	Items	#Units	Comments	Customer PO #	Entered By	Payment Terms	Sales Rep	Order Source	Shipped Via	Email	Warehouse
Q250307-0002	S250307-0001	03/07/2025	Breco Internat.	\$273.55	3	4			syrontest	Net 15	ztesttrachelle				Main Wareho.
Q250307-0001		03/07/2025	zTest 0602 (M...	\$0.00	1	1			Demo User	Net 30	Demo User				Main Wareho.
Q250306-0002		03/06/2025	zTest 0602 (M...	\$223.00	2	2			Demo User	Net 30	Demo User				Main Wareho.
Q250306-0001		03/06/2025	zTest 062120 ...	\$342.40	5	5			Demo User	Net 10	Demo User		Truck 1		Main Wareho.
Q250305-0003		03/05/2025	Best Auto Coll.	\$315.00	2	2			BestUser1	Net 30	ztesttrachelle		Truck 1		Main Wareho.
Q250305-0001	S250305-0003	03/05/2025	zTest 062120 ...	\$0.00	1	1			Demo User	Net 10	Demo User		Truck 1		Main Wareho.
Q250220-0001		02/21/2025	ABC Company	\$0.00	1	1			Syran	Net 30	Syran		Truck 2		Main Wareho.
Q250220-0002		02/21/2025	ABC Company	\$0.00	2	2			Syran	Net 30	Syran		Truck 2		Main Wareho.
Q250217-0001	S250217-0001	02/18/2025	ABC Company	\$0.00	1	1			Syran	Net 30	Syran		Truck 2		Main Wareho.
Q250214-0001	S250214-0004	02/14/2025	Breco Internat.	\$413.73	3	3			syrontest	Net 15	ztesttrachelle				Main Wareho.
Q250212-0001	S250212-0001	02/14/2025	Breco Internat.	\$219.86	2	2			Rachelle	Net 15	Lui Cabanag	Re-Order			Main Wareho.
Q250212-0002	S250212-0004	02/12/2025	Breco Internat.	\$10.72	1	1			syrontest	Net 15	ztesttrachelle				Main Wareho.
Q250211-0001	S250211-0008	02/11/2025	Breco Internat.	\$10.72	2	2			syrontest	Net 15	Dennis Shau				Main Wareho.
Q249123-0001	S249123-0001	01/03/2025	zTest 0602 (M...	\$300.00	1	3			Demo User	Net 30	Demo User				Main Wareho.
Q241017-0003		10/17/2024	Rachelle Com.	\$102.00	3	3			Rachelle	10th of month	Rachelle		Truck 1		Main Wareho.
Q241017-0004		10/17/2024	zTest 0602 (M...	\$138.00	4	4			Demo User	Net 30	Demo User				Main Wareho.
Q241017-0002	S241119-0002	10/17/2024	2978 INSPEC.	\$0.00	2	2			Rachelle	10th of month	Demo User				Main Wareho.
Q241017-0001		10/17/2024	2978 INSPEC.	\$0.00	2	2			Rachelle	Net 30	Rachelle				Main Wareho.
Q241015-0002		10/15/2024	Anahim Coll.	\$92.84	1	1			Demo User	Net 30	Demo User		Truck 1		Main Wareho.
Q241010-0001		10/10/2024	Best Auto Coll.	\$0.00	1	1			BestUser1	Net 30	ztesttrachelle		Truck 1		Main Wareho.
Q241010-0002	S241010-0002	10/10/2024	Rachelle 2	\$28.11	2	2			Rachelle	10th of month	Rachelle		Truck 1		Main Wareho.
Q241001-0001		10/01/2024	Rachelle Com.	\$240.00	2	2			Rachelle	10th of month	Rachelle		Truck 1		Main Wareho.
Q240823-0001		09/23/2024	Rachelle Com.	\$10.00	1	1			Rachelle	10th of month	Rachelle		Truck 1		Main Wareho.
Q240830-0001		08/30/2024	zTest 0602 (M...	\$56.54	2	2			Demo User	Net 30	Demo User				Main Wareho.
Q240828-0001	S240828-0002	08/28/2024	A - M PAINT	\$480.00	3	3			Rachelle		Rachelle				Main Wareho.
Q240827-0001		08/27/2024	zTest 0602 (M...	\$129.30	3	3			Demo User	Net 30	Demo User				Main Wareho.
Q240816-0001		08/17/2024	zTest 0602 (M...	\$0.00	2	2			Demo User	Net 30	Demo User				Main Wareho.
Q240716-0002	S240716-0002	07/16/2024	Rachelle Com.	\$248.98	1	1			Rachelle	Net 30	Rachelle				Main Wareho.
Q240716-0001	S240716-0001	07/16/2024	Rachelle Com.	\$248.98	2	2			Mark Barrios	Net 30	Mark Barrios				Long Beach
Q240715-0001	S240715-0001	07/15/2024	Rachelle 4119	\$291.62	1	1			Rachelle	10th of month	John		Truck 1		Main Wareho.
Q240712-0001		07/12/2024	2012 Compan.	\$54.80	2	2			Rachelle	10th of month	Rachelle		Truck 1		Main Wareho.

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New Refresh

3. Click the new button on the quotation list screen to create a new quotation.

3. Create a New Quote on the Sales Quote Screen

On the Quotation List screen, click on any existing quote and then you will be routed to the quotation screen. On that screen, at the lower left corner, click the New button to create a new quotation.

1. Click on any existing quote and then you will be routed to the quoted screen.

Quotation List

Quote Number	Sales Order Num	Quote Date	Customer	Quote Total	Items	#Units	Comments	Customer PO #	Entered By	Payment Terms	Sales Rep	Order Source	Shipped Via	Email	Warehouse
Q250307-0002	S250307-0001	03/07/2025	Breco Internat.	\$273.55	3	4			syrontest	Net 15	ztesttrachelle				Main Wareho.
Q250307-0001		03/07/2025	zTest 0602 (M...	\$0.00	1	1			Demo User	Net 30	Demo User				Main Wareho.
Q250306-0002		03/06/2025	zTest 0602 (M...	\$223.00	2	2			Demo User	Net 30	Demo User				Main Wareho.
Q250306-0001		03/06/2025	zTest 062120 ...	\$342.40	5	5			Demo User	Net 10	Demo User		Truck 1		Main Wareho.

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New Refresh

1place

ABC Auto Body Supply

Find Parts

Dashboard

Customers

Vendors

Items

Sales

AR

Purchasing

Warehouse

Jobs

Tasks

Documents

Reports

Sync

Quotation

Sync

Bill To: kTest 0602 (McDonalds - Ana) Ship To: zTest 0602 (McDonalds - Ana) Quotation # Q250307-0001

Sales Order # Expiration Date Type Of Quote Warehouse Tax Exempt

Quote Date: 03/07/2025 Customer PO # Entered By: Demo User Payment Terms: Net 30 Sales Rep: Demo User Order Source Shipped Via Contact Email Job ID

Add/Edit Line Item

Action	Qty Ord	Item #	Description	PO #	List Price	Unit Price	Dis %	Net Price	Line Total
III X	0								

0 - 1 of 1

Commit Line Item

Comments Custom Fields

Comments

Subtotal \$0.00 This Customer is Tax Exempt \$0.00 Freight \$0.00 Total \$0.00

Note: Quotations do NOT change inventory levels.

New Delete Refresh

Duplicate Quote Create Sales Order

Send Email Print Follow up Function Save **Next** Close

2. On the quotation screen, click on the New button to create a new quote.