

Quotation screen - How To's

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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 shows the iPlace Dashboard with a sidebar on the left containing a '+ Menu' button. A dropdown menu titled 'Add New Record' is open, listing various record types with their respective keyboard shortcuts. The 'Quotes' option is highlighted. The main dashboard area includes several widgets: a top summary bar with key metrics, a 'My Open Orders' table, a 'Sales (Orders)' table, and a 'Customers added this year' table. A pie chart and a bar chart are also visible in the middle section.

Metric	Value
Total Customers	199
Total Quotes	242
Total Sales Orders	1670
Total Invoices / Credits	1014 / 257
Total Items	119493
Total PO's	685

Date	Order #	Status	Company	Order Total
03/06/2025	0250006-0004	New	zTest 062120 (...)	\$173.48
03/05/2025	0250005-0001	New	ABC Customer	\$0.00
12/19/2024	0241210-0001	New	Test 0120-2	\$0.00
12/26/2024	0241226-0001	New	zTest 0602 (Mc...	\$61.52
03/05/2025	0250005-0003	New	zTest 062120 (...)	\$53.88
06/02/2021	01481	New	Bear's Auto Bod...	\$115.67
12/16/2021	1739	New	zTest 0602 (Mc...	\$177.87

Days	My Order Count	My Order Sales	Company Order Count	Company Order Sales	%
Today	0	\$0.00	0	\$0.00	0%
Last 7 Days	0	\$0.00	0	\$0.00	0%
Last 30 Days	6	\$1,153.95	6	\$1,153.95	100.00%
Last 90 Days	14	\$2,108.98	14	\$2,108.98	100.00%
Last 365 Days	43	\$5,564.24	43	\$5,564.24	100.00%

CompanyName	Date
zTest Long Beach Customer	03/17/2025
A & V ELITE MOTORS LLC	03/14/2025
Z Test Shannon Customer	02/19/2025

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	Q250307-0001	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	Q250305-0003	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	Q250217-0001	02/18/2025	ABC Company	\$0.00	1	1			Syran	Net 30	Syran		Truck 2		Main Wareho.
Q250214-0001	Q250214-0004	02/14/2025	Breco Internat.	\$413.73	3	3			syrontest	Net 15	ztesttrachelle				Main Wareho.
Q250212-0001	Q250212-0001	02/14/2025	Breco Internat.	\$219.86	2	2			Rachelle	Net 15	Lui Cabanag	Re-Order			Main Wareho.
Q250212-0002	Q250212-0004	02/12/2025	Breco Internat.	\$10.72	1	1			syrontest	Net 15	ztesttrachelle				Main Wareho.
Q250211-0001	Q250211-0008	02/11/2025	Breco Internat.	\$10.72	2	2			syrontest	Net 15	Dennis Shau				Main Wareho.
Q250123-0001	Q250123-0001	01/23/2025	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	Q241119-0002	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	Q241010-0002	10/10/2024	Rachelle 2	\$28.11	2	2			Rachelle	10th of month	Rachelle		Truck 1		Main Wareho.
Q24091-0001		10/01/2024	Rachelle Com.	\$240.00	2	2			Rachelle	10th of month	Rachelle		Truck 1		Main Wareho.
Q240823-0001		08/23/2024	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	Q240828-0002	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	Q240716-0002	07/16/2024	Rachelle Com.	\$240.98	1	1			Rachelle	Net 30	Rachelle				Main Wareho.
Q240716-0001	Q240716-0001	07/16/2024	Rachelle Com.	\$240.98	2	2			Mark Garcias	Net 30	Mark Garcias				Long Beach
Q240715-0001	Q240715-0001	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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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.