How to Create a Quote using the Quote screen

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Overview

Use the **Quote** screen in 1place when you know which items a customer wants priced. You'll select the customer, add the items and quantities, and review the prices before saving the quote. You can then email or print it for the customer.

Steps

1. **Start a new quote.**
   Go to **Sales > Quotes** and click **New** at the bottom left of the Quotes list. If you already have a quote open, click **New** at the bottom left of the Quote screen.
2. **Select the customer.**
   Choose the customer in **Bill To** and review **Ship To**. If the items will be delivered to a different location, select the correct **Ship To** before adding items.
3. **Review the quote details.**
   Check the **Contact**, **Email**, **Payment Terms**, and **Shipped Via** fields. Update them as needed for this quote.
4. **Add an item.**
   In the blank row under **Add/Edit Line Item**, type the **Item #** and select the matching item from the list. Enter the quantity the customer wants quoted.
5. **Review the line and commit it.**
   Verify the item description, quantity, and **Net Price**. If you need to adjust the price and have permission to do so, edit **Net Price** or **Dis %** as applicable. Click **Commit Line Item**, then repeat for each additional item.
6. **Save the quote.**
   Review the line items and quote total, then click **Save**.

Send the quote to the customer

Click **Send Email** to email the saved quote. Select the quote document, click **Preview Email**, and verify the recipient and attachment before sending. To review or print a copy, click **Print** and choose the quotation document template.

If the customer accepts the quote, open the saved quote and click **Create Sales Order**.

If you need to look up parts by vehicle before quoting, see How to Find, Price, and Sell Parts Using the Find Parts Screen.