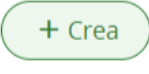


# 9.2 Quotes

You can create a new quote through the reports and Add Quote menu from the potential, company or contact registry.

**NB.:** a quote cannot be created starting from a lead.

Alternatively, you can create a new quote from the Quotes module using  entering the links to the customer manually.

<b>Subject</b>	It is recommended that the name of the company and/or the project be mentioned to facilitate searches
<b>Potential name</b>	Link field of the quote to the relevant business potential
<b>Quote Stage</b>	Important for knowing the state of progress of the negotiation. The statuses can be freely set by the system administrator
<b>Valid Till</b>	Expiry date of the offer
<b>Contact Name</b>	Connection with the contact person (equivalent to "for the attention of")
<b>Inventory Manager</b>	The choice of an inventory manager does not involve automatisms, it is a field of view only
<b>Account Name</b>	Connection with the client company to which the quote refers
<b>Assigned to</b>	The CRM user who is managing the quote, by default the person creating it

Creating Quote

Quote Information

Quote No: AUTO GEN ON SAVE

Quote Stage: --Please select--

Valid Till: [Calendar Icon]

Carrier: FedEx

Potential Name: Search...

Totale Provvigione: (€)

Subject: Shipping

Contact Name: Search...

Account Name: Search...

Assigned To: User

Address Information

Billing address ↔ Shipping address

Billing Address: [Redacted]

Shipping Address: [Redacted]

Shipping PO Box: [Redacted]

Shipping City: [Redacted]

Shipping State: [Redacted]

Shipping Postal Code: [Redacted]

Shipping Country: [Redacted]

Inventory Manager: mariobianchi12345@gmail.com (Mario Bianchi)

Billing PO Box: [Redacted]

Billing City: [Redacted]

Billing State: [Redacted]

Billing Postal Code: [Redacted]

Billing Country: [Redacted]

Terms & Conditions

Terms & Conditions

Tempo di consegna, sviluppi od altri servizi da concordare con il ns. referente.  
 I prezzi indicati sono Intesi al netto dell'IVA (22%)  
 Pagamento: 50% alla conferma d'ordine con fattura a rimessa diretta, il rimanente 50% a 60gg d.f.f.m.  
 Per conferma del preventivo, inviare offerta controfirmata tramite email.

Description Information

Description: [Redacted]

Item Details

Currency: Euro (€) Tax Mode: Individual


Tools	* Item Name	Qty In Stock	Qty	List Price	Provvigioni	Total	Price colonna test	colonna formula
Search...		0.00	1.00	0.00	0.00	0.00	data	test formula
Description							(ds-mm-yyyy)	0
Comments								
							0.00	
							<b>Total</b>	0.00
							(-) Discount	0.00
							(+) Shipping & Handling Charges	0.00
							(-) Taxes For Shipping and Handling	0.00
							Adjustment Add	0.00
							<b>Grand Total</b>	<b>0.00</b>

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The second part of the data sheet shows the product/service lines. You can enter your product by filling in the appropriate section.



<b>Discount</b>	You can discount per product line and/or in total, expressed as a percentage of the list price or a precise figure. In the case of %, it is possible to indicate several discounts in sequence by separating the percentages with 
<b>Tax</b>	vtenext calculates taxes based on the information set out in the product data sheet. It is possible to change the tax without changing the product catalogue entry. You can display one tax per line or in total
<b>Margin</b>	Calculated automatically: it's the ratio between profit (list price - product cost) and list price
<b>Shipping charges</b>	You can add additional shipping and handling fees
<b>Tax on shipping charges</b>	You can add additional taxes on shipping and handling fees
<b>Adjustment</b>	Rounding the final value upwards or downwards

Once you have saved the quote, you can create or send the relevant PDF using the functions provided by the PDF Maker module panel in the Other menu, at the top right.

For more information on the PDF Maker module and printing, please refer to the relevant chapter.

You can use the reports menu to specifically link communication with your customer (Messages), appointments (Activities), the scan of the quote with changes that the customer asks you to make (Documents), and so on, to the quote.

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Revision #1

Created 2026-01-28 14:56:19 UTC by Admin

Updated 2026-01-28 14:56:19 UTC by Admin