



Standard edition

ComplaintTracker

manage customer complaints



Entering a Quotation (Trial edition)

Step by step guide to enter a Quotation in ComplaintTracker Standard.

1

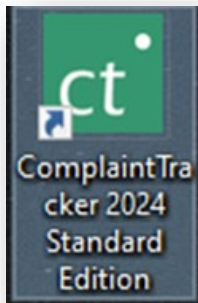
INDEX

Steps

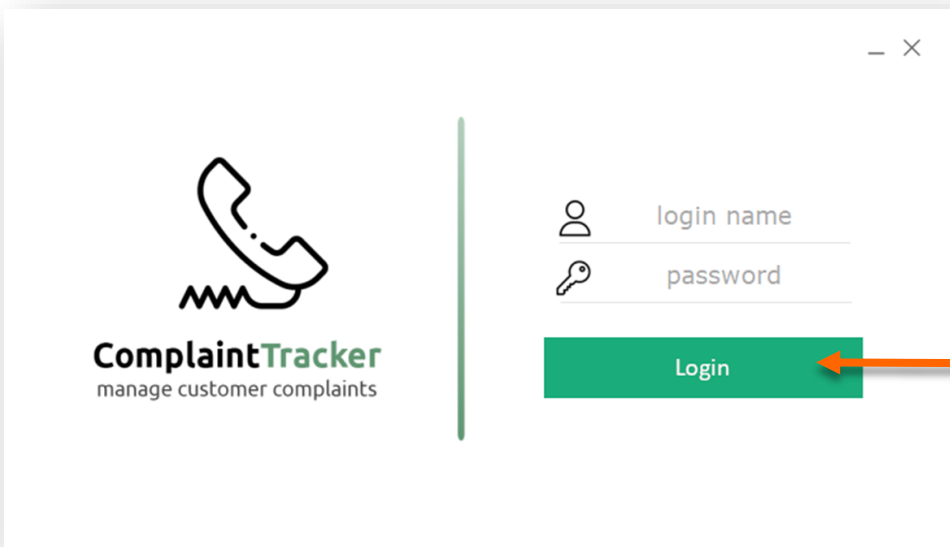
- 1. Index _____ Pg 2
- 2. Login _____ Pg 3
- 3. Entering a Quotation _____ Pg 4

2

LOGIN



Start ComplaintTracker

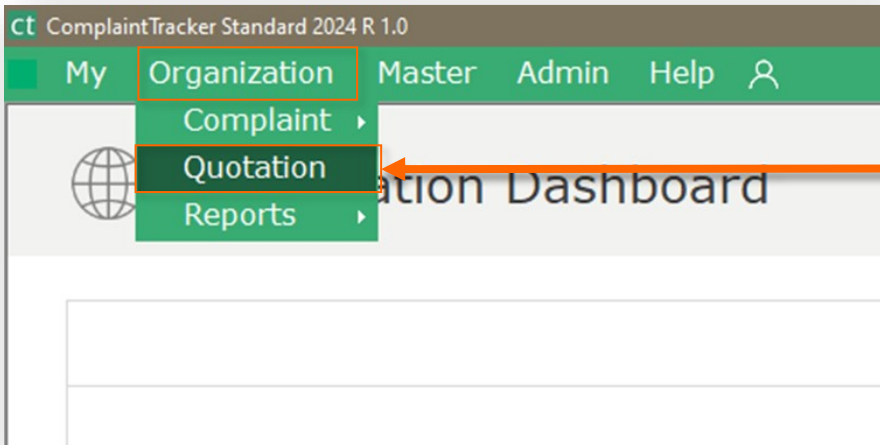


Enter Login name and password

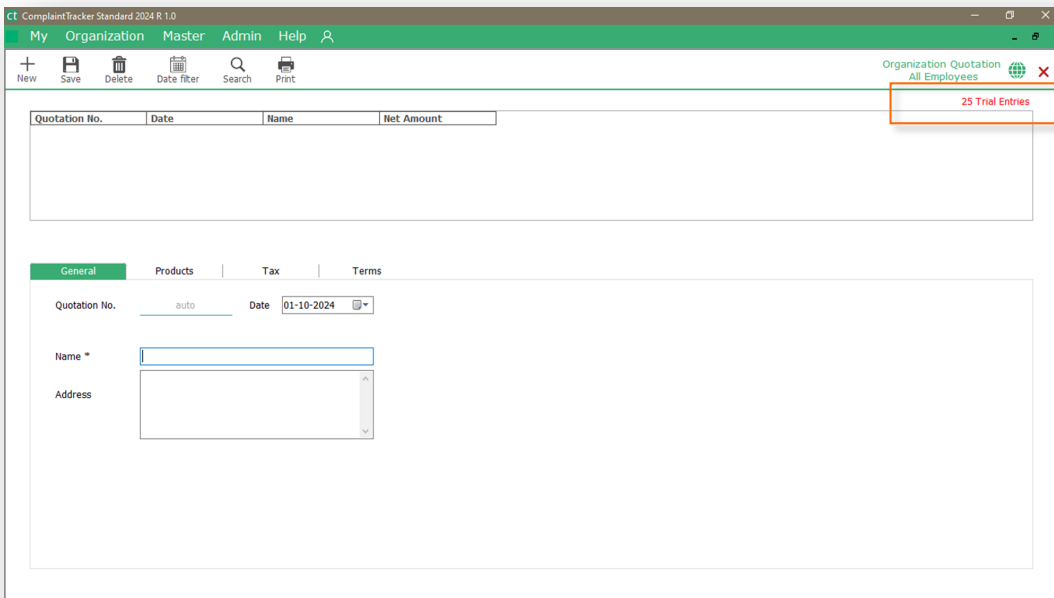
Click on **Login**

3

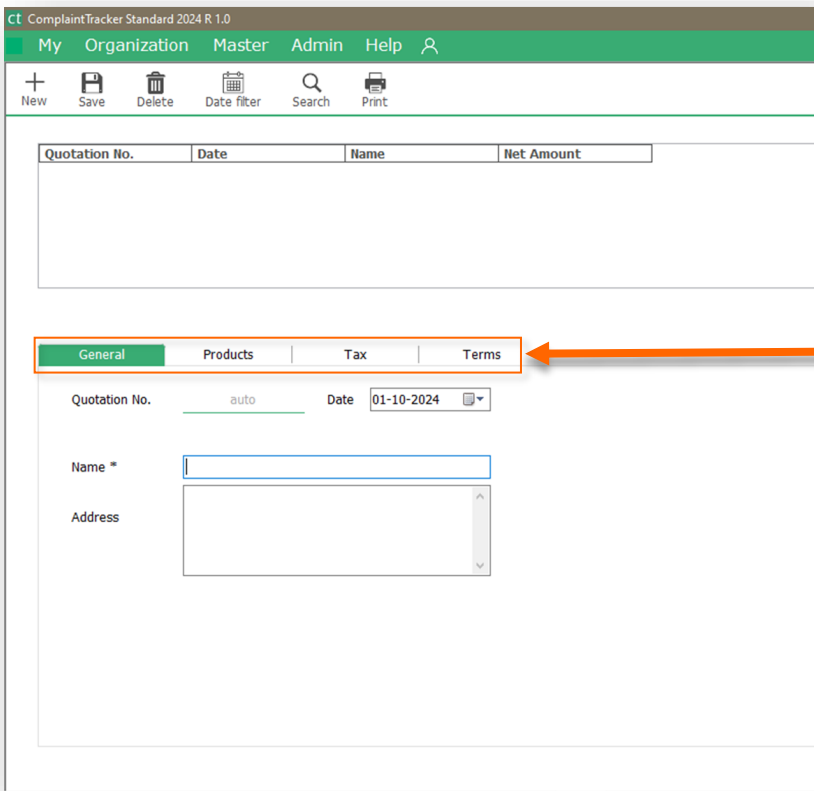
Entering a Quotation



Go to
Organization > Quotation

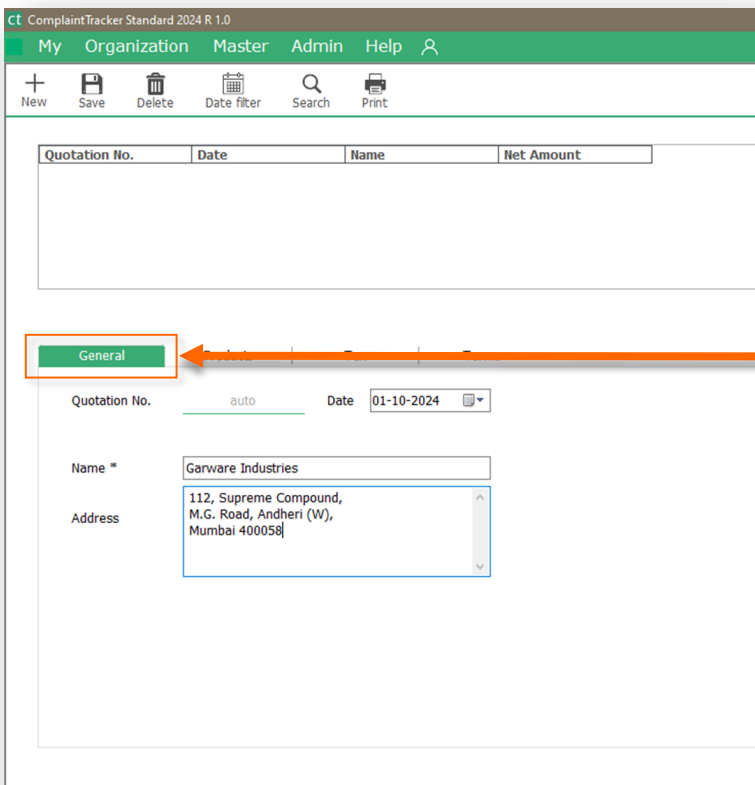


Please note: this is a trial edition, has a cap of 25 trial entries.



Here, we can see four tabs:

- **General** : this tab will have basic details on the quotation.
- **Products** : this tab has product list for the quotation.
- **Tax** : tax details on quotation.
- **Terms** : terms and condition

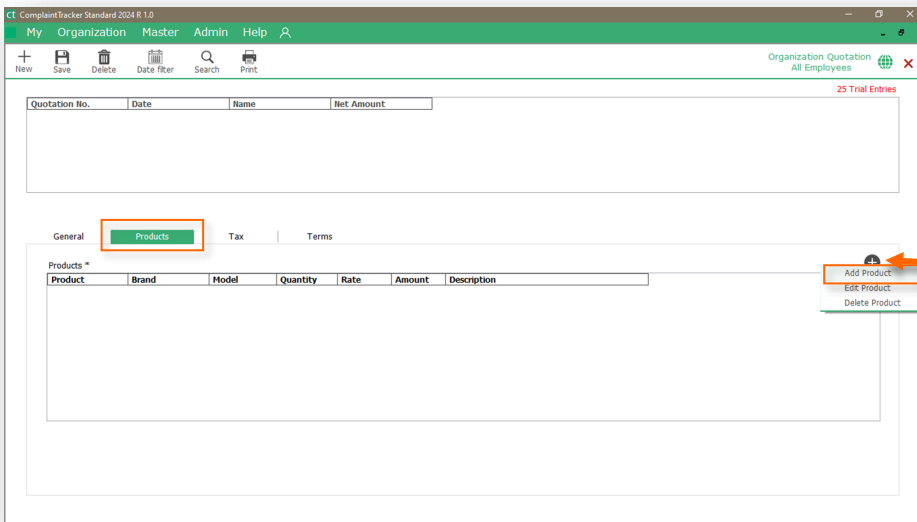


General Tab:

Fill details such as

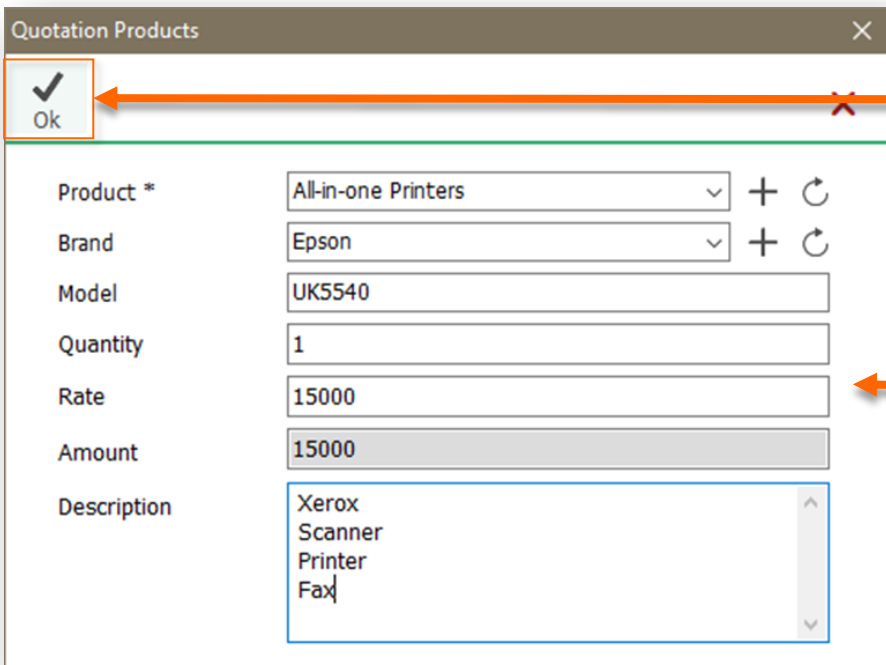
- Name
- Address
- Set Date

Quotation No. will be auto generated by the system.



Products Tab:

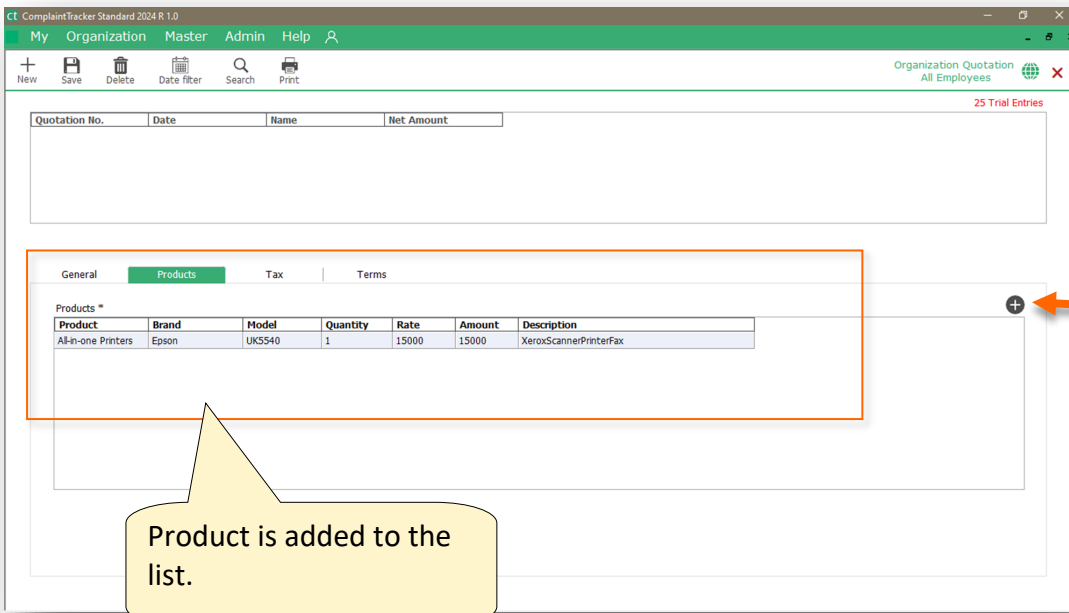
1. Click on the plus icon to add products.
2. Click on **Add Product**



Fill products details such as:

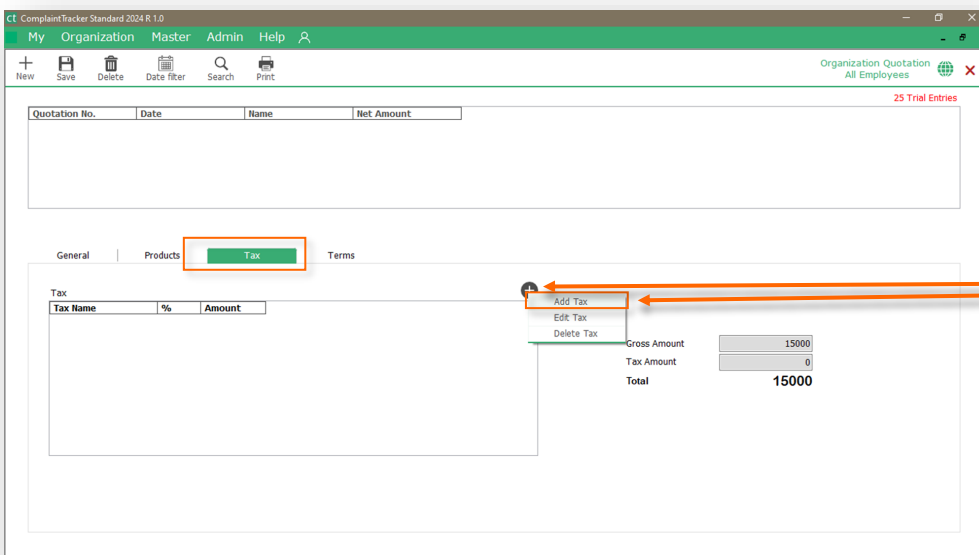
- Select from multiple Products
- Select from multiple Brands
- Enter Model
- Quantity
- Rate
- Enter Description or Remarks, if any

Amount will be auto calculated. Click on **OK** to save the product.

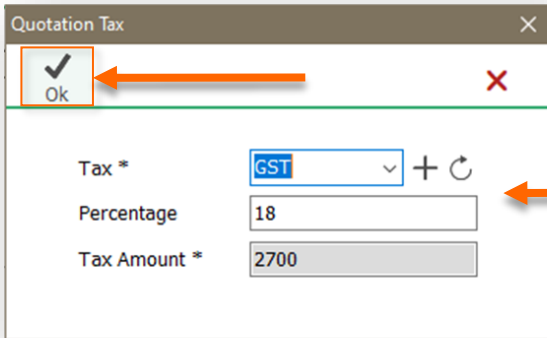


Click on the plus icon and repeat the process to add multiple products to the list.

Product is added to the list.



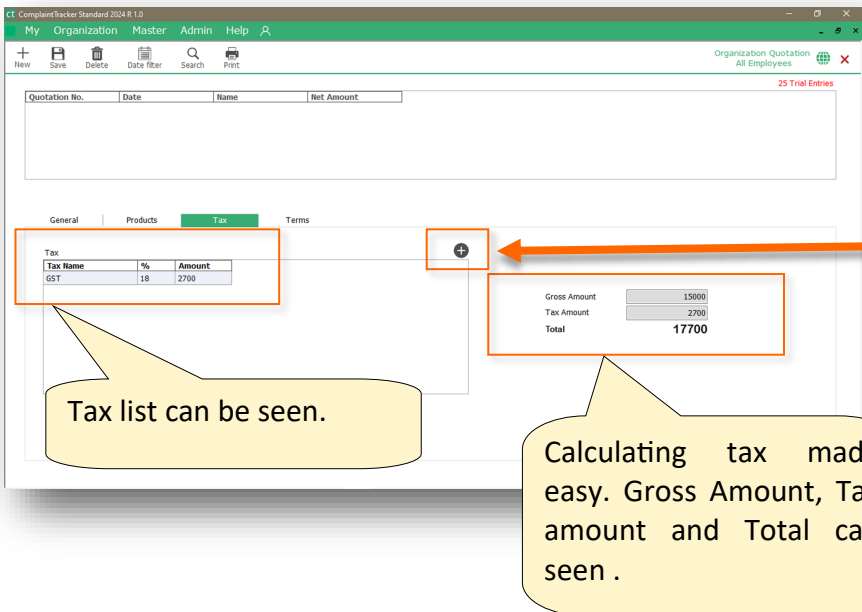
Tax Tab:
 To add tax on quotation
 1. Click on the plus icon
 2. select **Add Tax**
Quotation Tax window will open.



Fill tax details:

- Select Tax
- Tax amount will be calculated by the system. Once done click on **OK**.

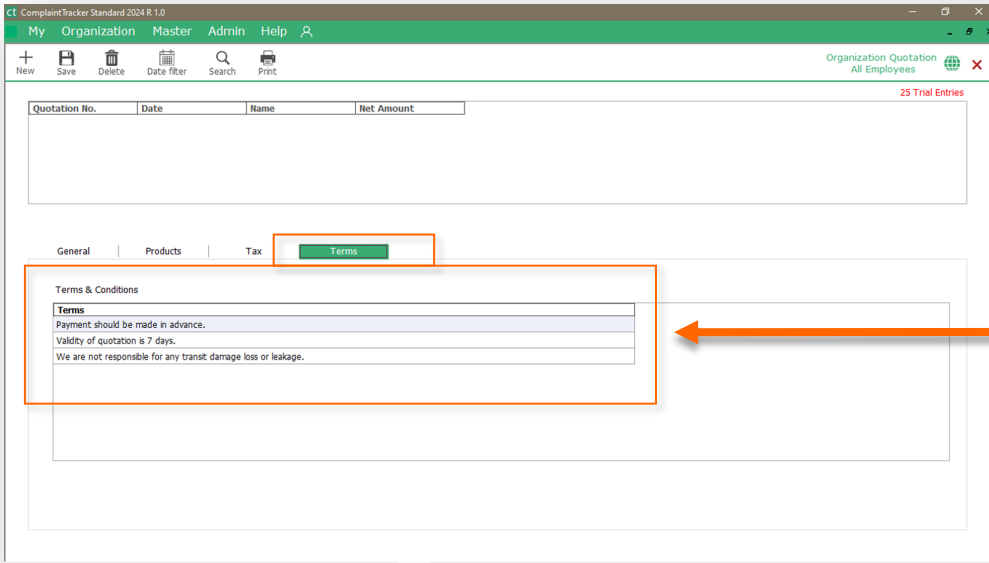
Note: you can add multiple tax to your quotation.



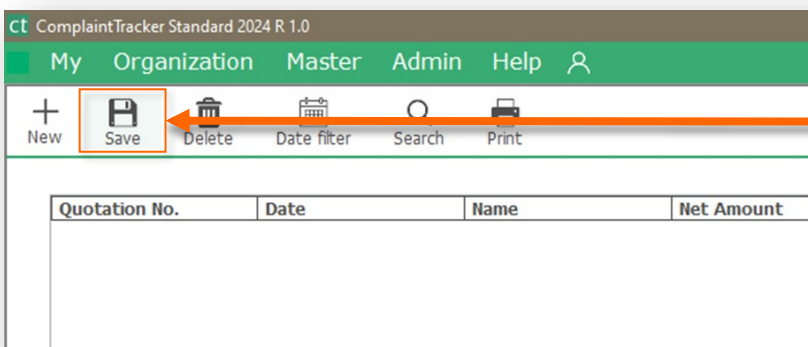
Click on the plus icon and repeat the process to add multiple Tax to the Quotation.

Tax list can be seen.

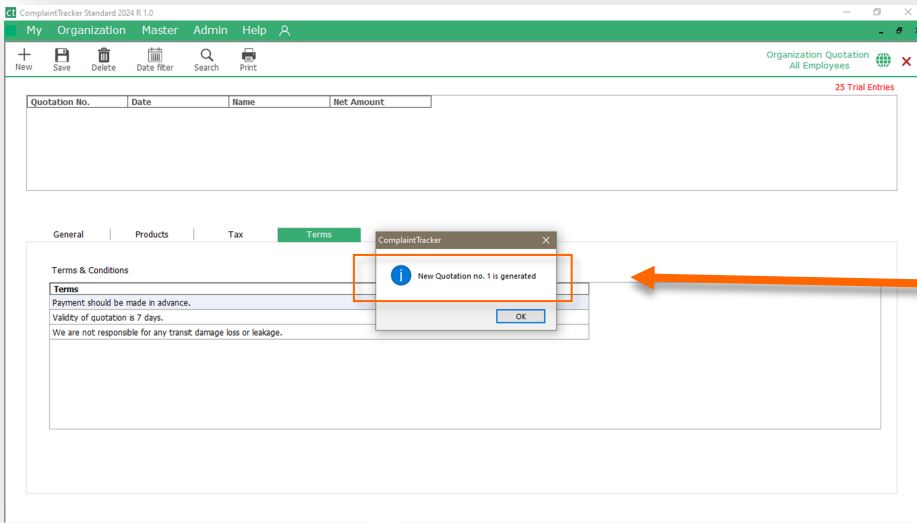
Calculating tax made easy. Gross Amount, Tax amount and Total can seen .



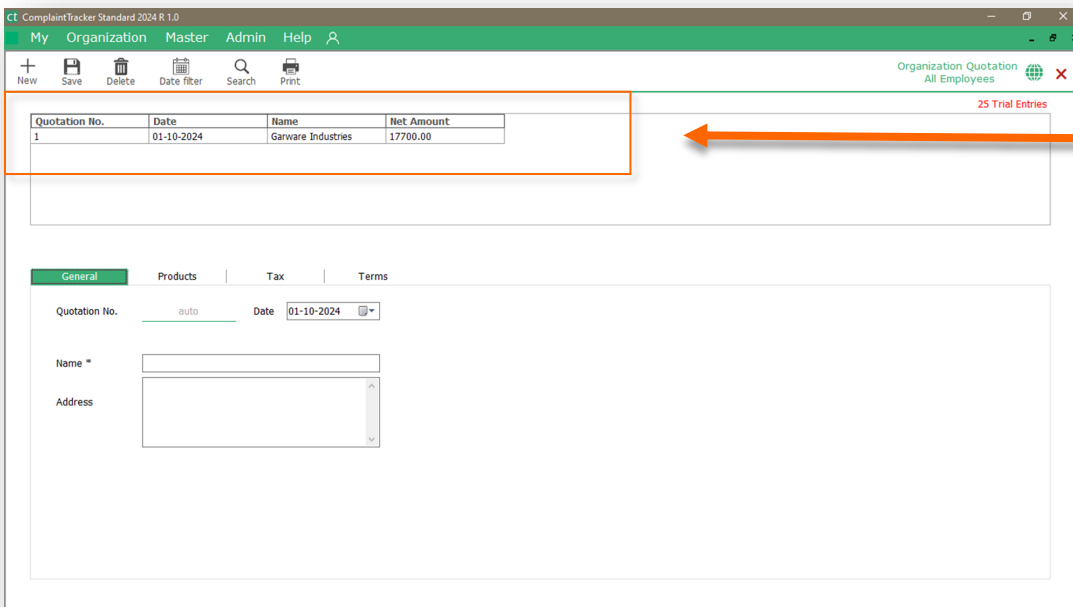
Terms:
Terms and conditions are fetched from master data, can be changed or updated from **Master>Terms**.



Click on **Save**.



Quotation No. 1 will be generated.
Quotation is saved successfully.
Click on **Ok**.



All quotations can be seen in the list.



Congratulations

You have successfully entered your first Quotation in
ComplaintTracker Standard.

Thank you

For more information

Kindly Call us or WhatsApp **+91.99 201 401 00** for any queries.

For more info visit: spinso.com

Next step



Reports

how to view reports in ComplaintTracker Standard

[CT STD How-To-View-Report.pdf](#)

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25

years in business

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manage warranties & AMC



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