SPINSO

Standard edition

Quotation**Tracker**

create professional quotation

Entering Quotation (Trial Edition)

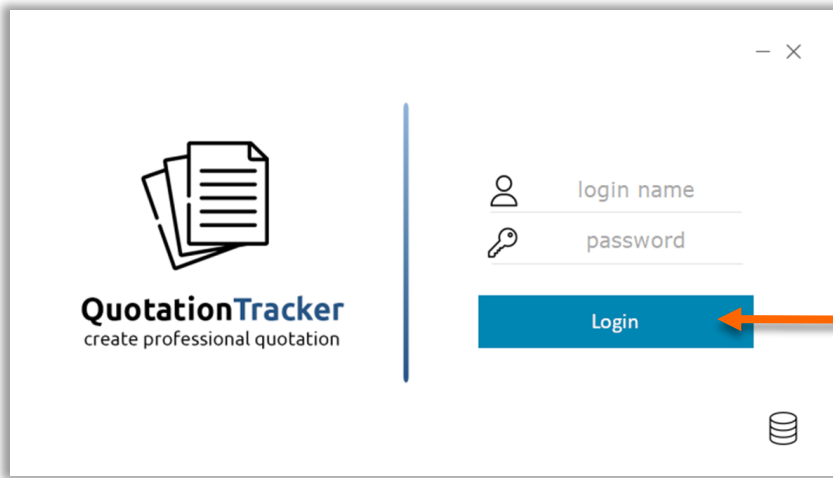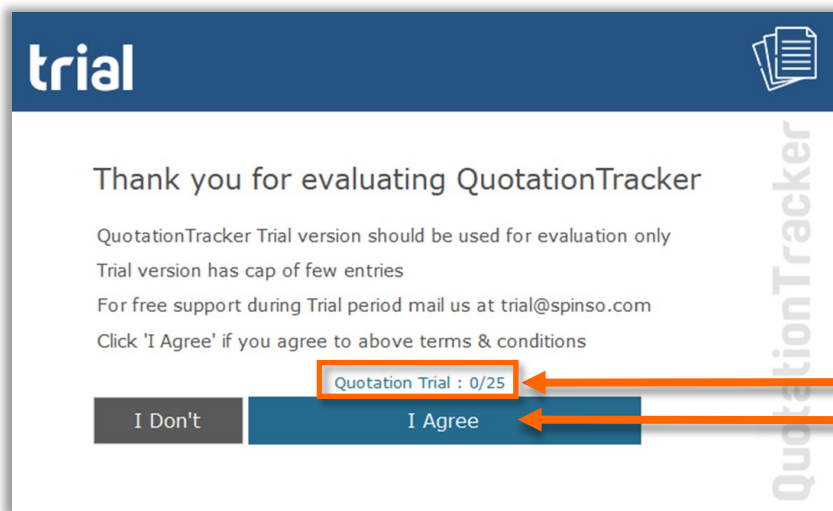Step by step guide on how to enter a Quotation in QuotationTracker

1 INDEX

Steps

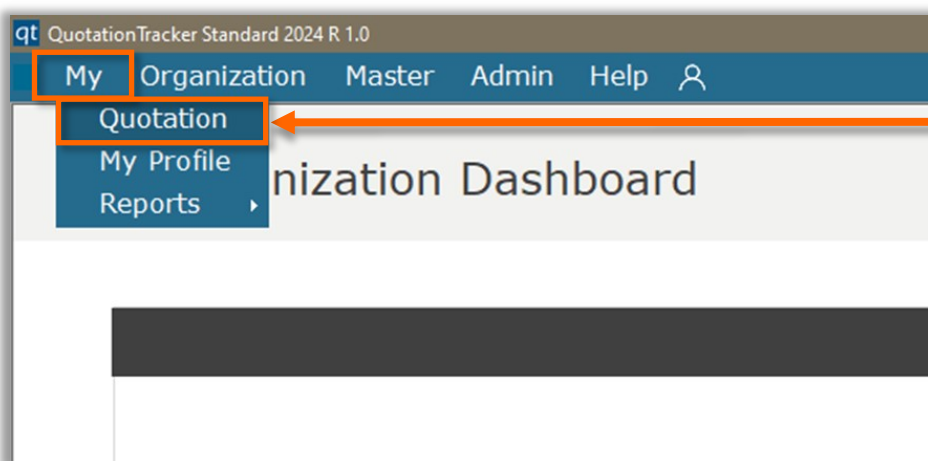**2**

Go To Quotation Screen

Enter Login name and password
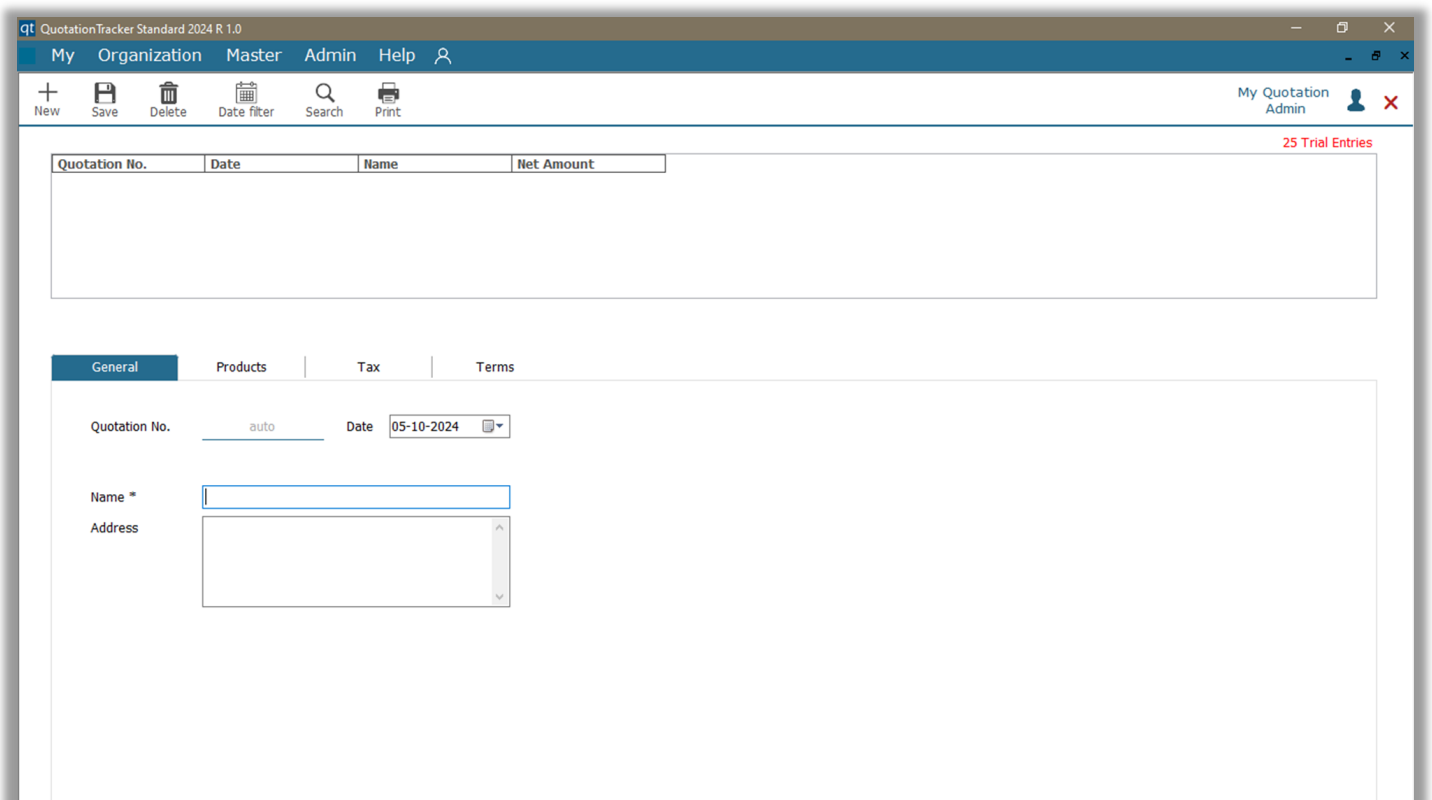
Click on **Login**

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

No. of trial entries used.

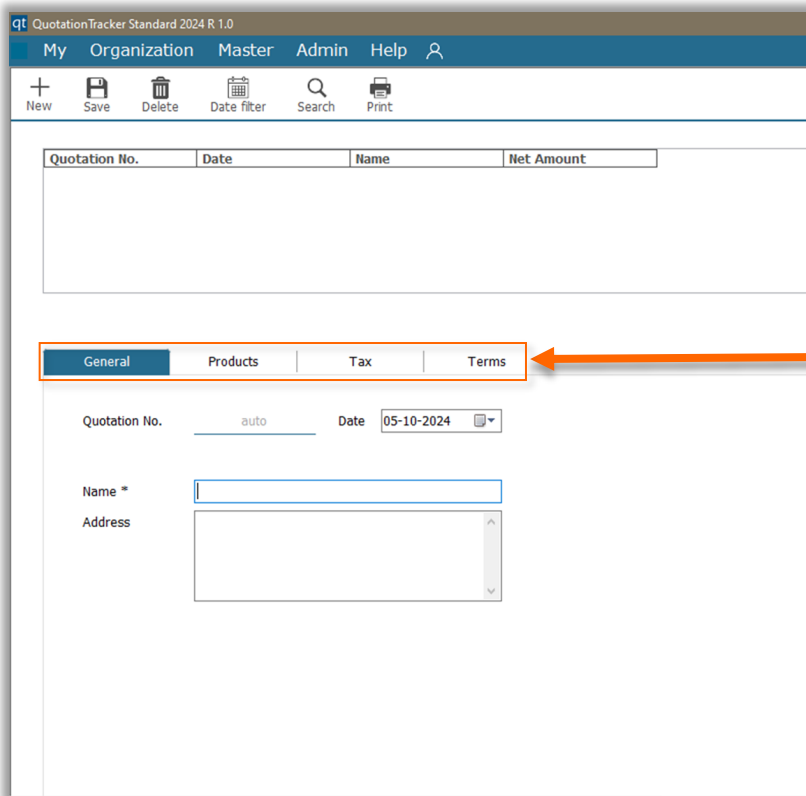Click on **I Agree**

Go to

My > Quotations

Quotation Screen

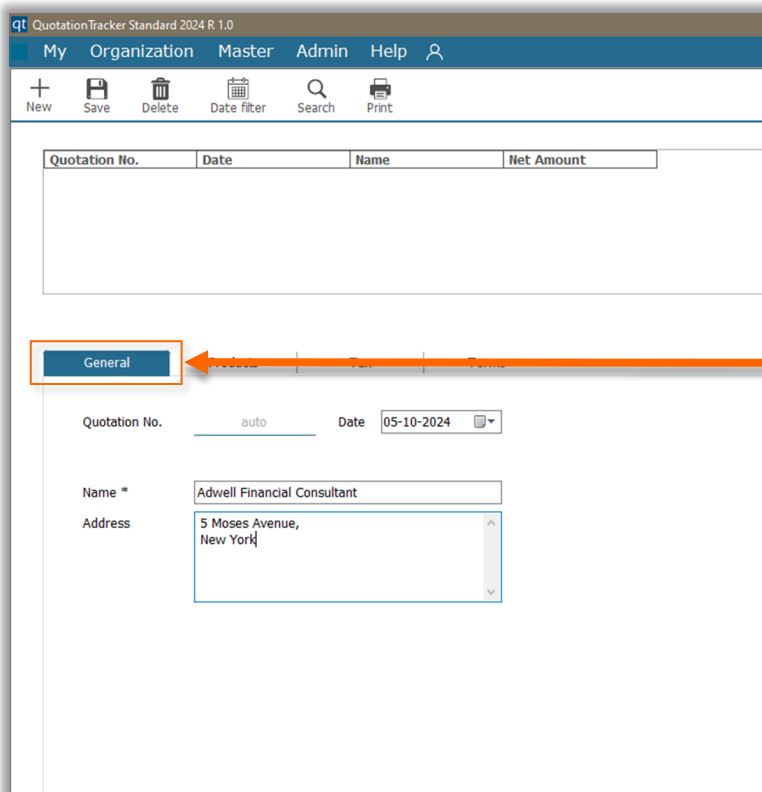Please note: this is a trial edition, has a cap of 25 trial entries.

3

Entering a Quotation

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:

Click on the plus icon to add products.

Click on **Add Product**

Fill products details such as:

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

Amount will be auto calculated.

Click on **OK** to save the product.

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

Fill tax details:
- Select Tax
- Enter percentage
- Tax amount will be calculated by the system.

Once done click on **OK**.

Note: you can add multiple tax to your quotation.

Tax list can be seen on the left

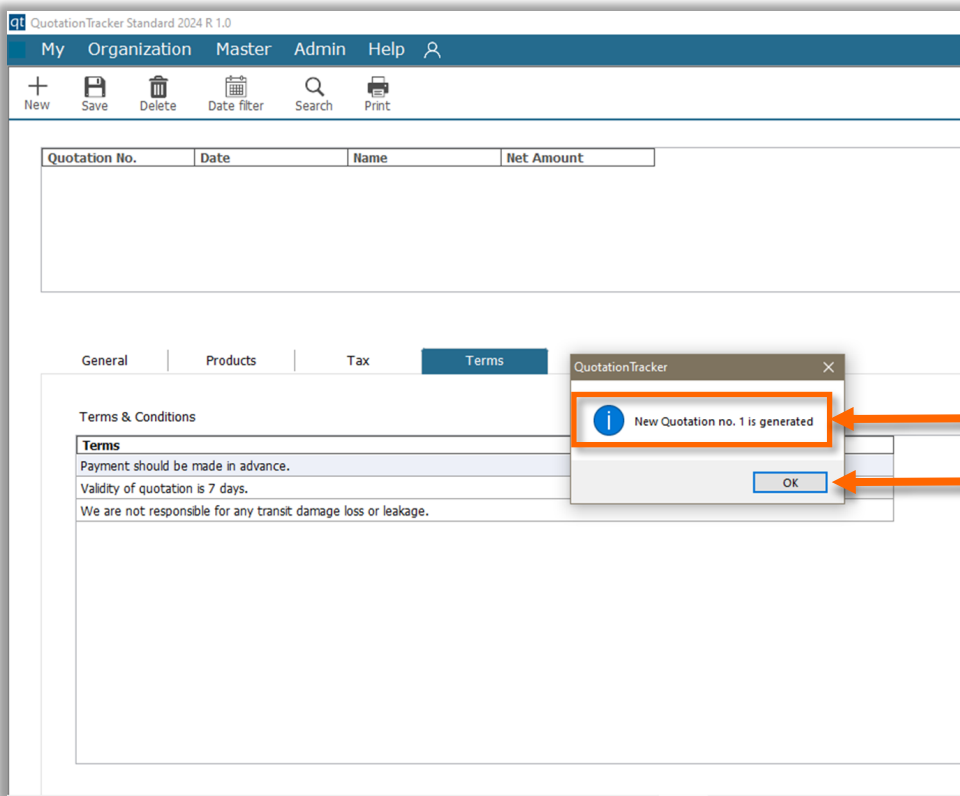Calculating tax made easy. Gross Amount, Tax amount and Total can seen on the right.

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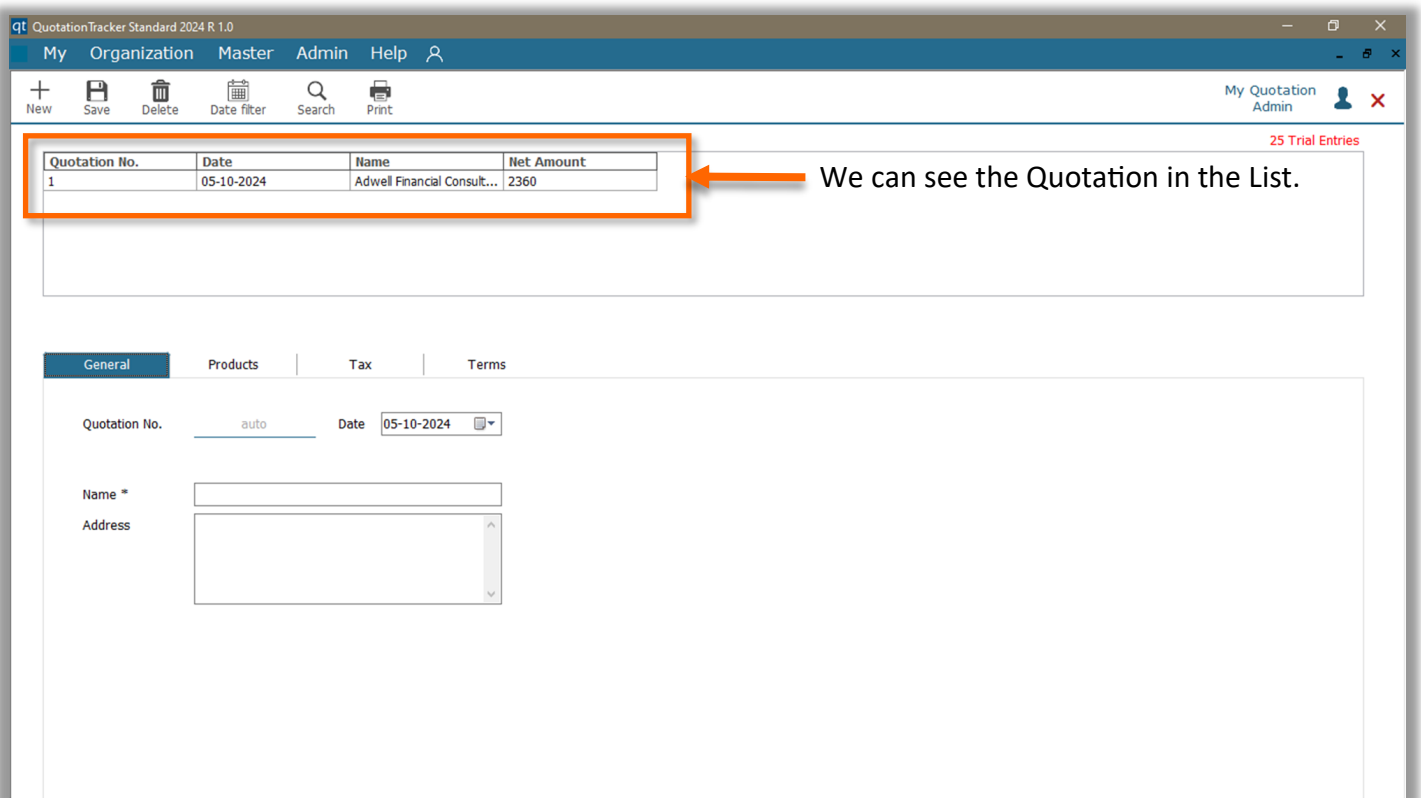
Terms tab:

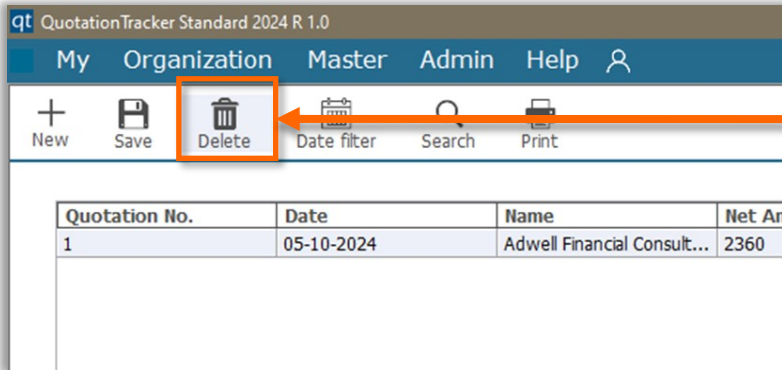Terms and conditions for the quotation.
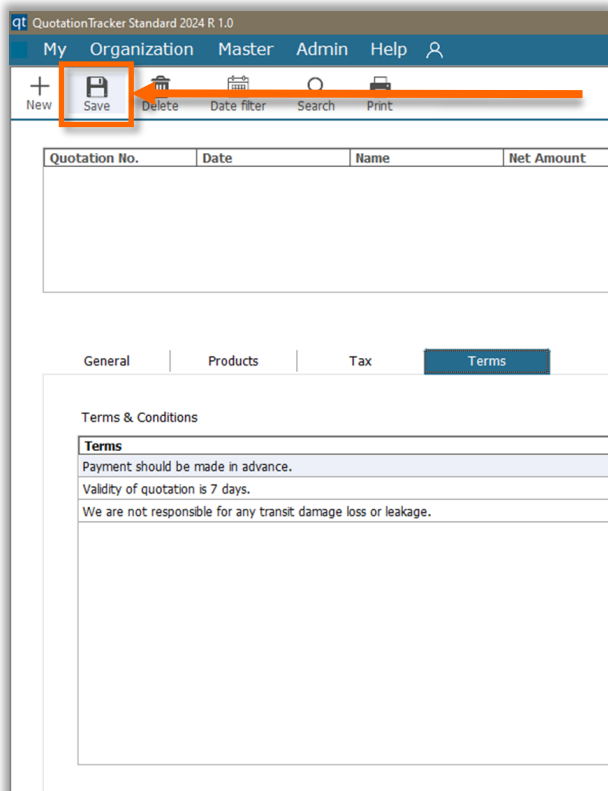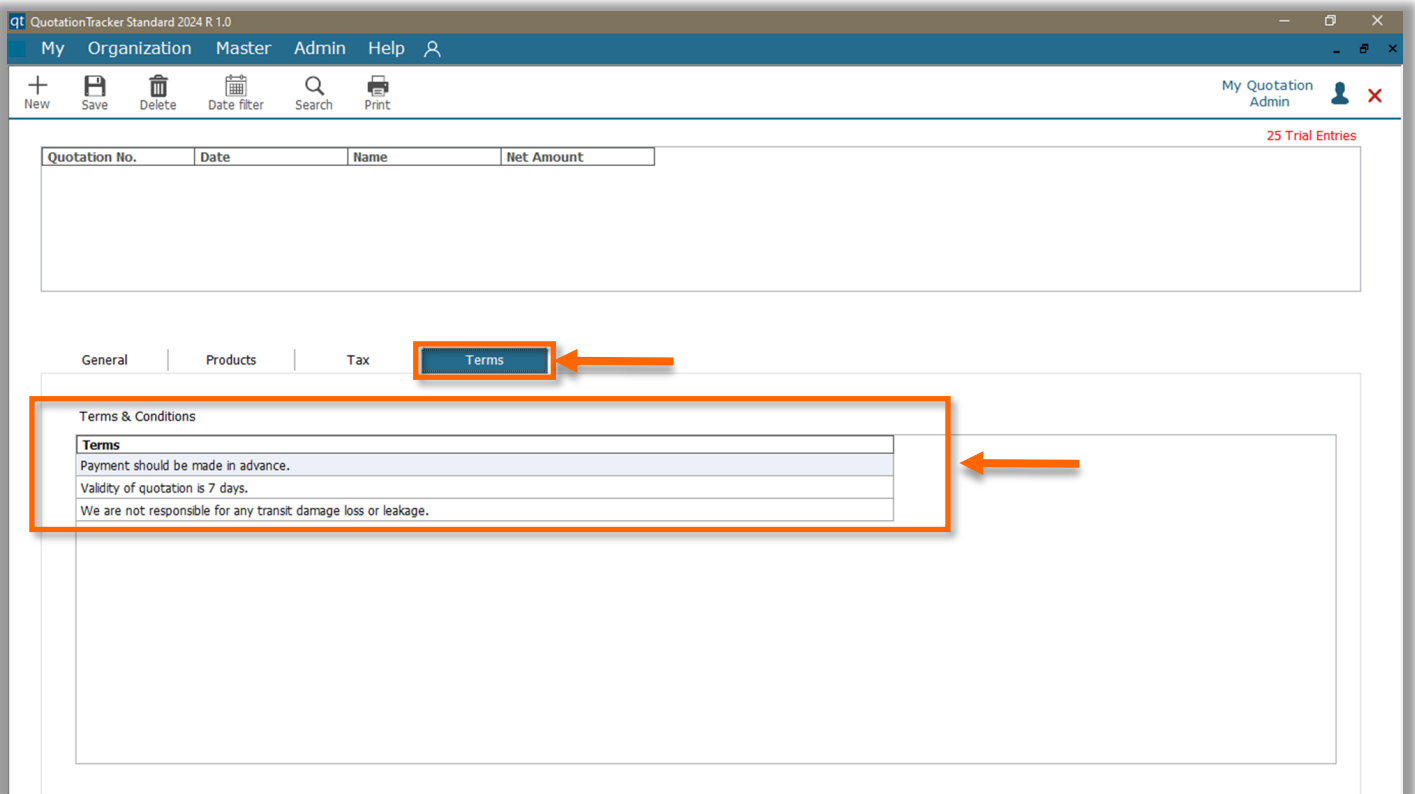
Click on **save**.

Quotation record is saved..!
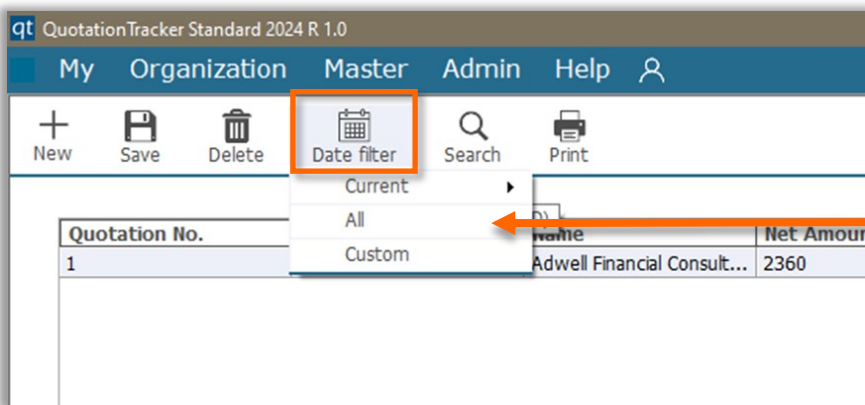Quotation No. generated.
Click on **save.**

We can see the Quotation in the List.

4 Additional Information

Delete : Select a Quotation from the list then click on delete. This will delete the Quotation.
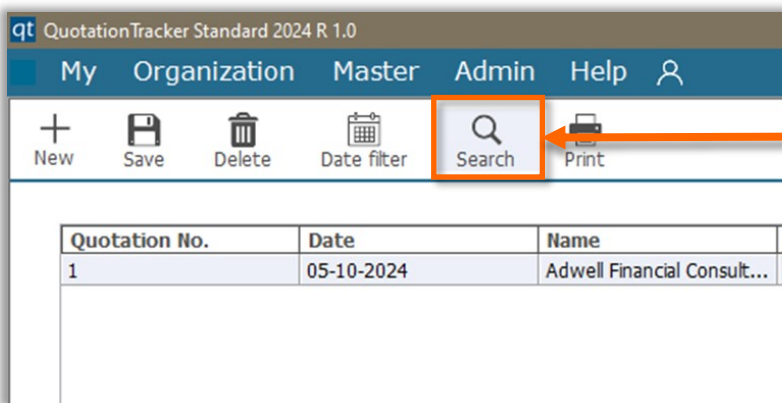

Date Filter:
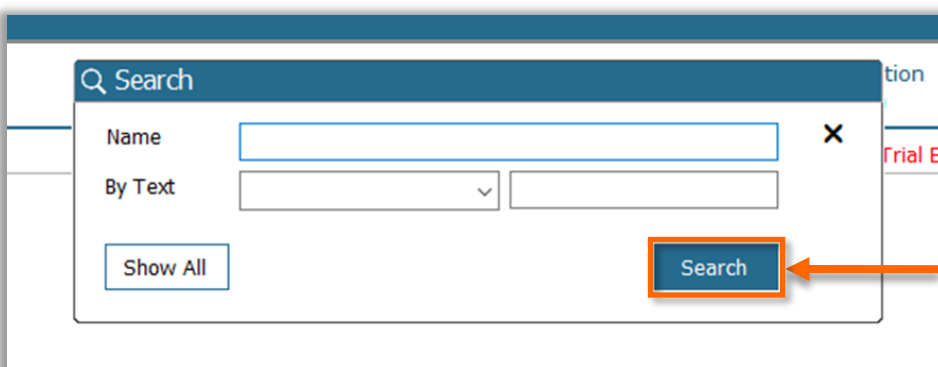Filter the Quotation records by date.

Custom Date Filter:
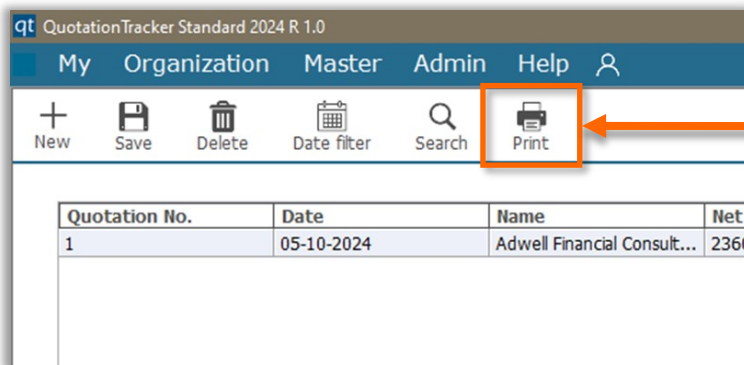Show data from a specific period of time.

Search:
Search/find records by Name or products from the Quotation list.

Enter Name or select products then click on **Search**.

Print : Select a Quotation from the list then click on **Print**.

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Thank you

We hope this was successful. Kindly Call us or WhatsApp **+91.99 201 401 00** for any queries.

We recommend you to see our **How to view Report** Help file Next.

For more info visit: **https://www.spinso.com**