

SPINSO[®]



Standard edition

QuotationTracker

create professional quotation



Entering Quotation (Trial Edition)

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

1

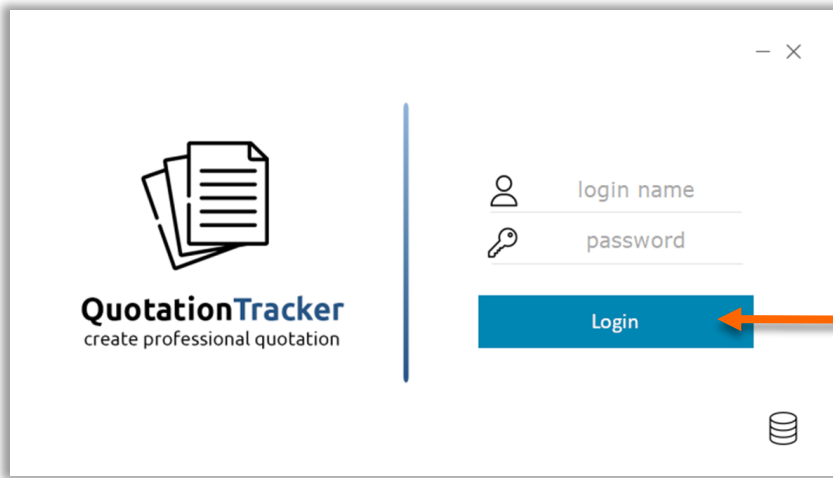
INDEX

Steps

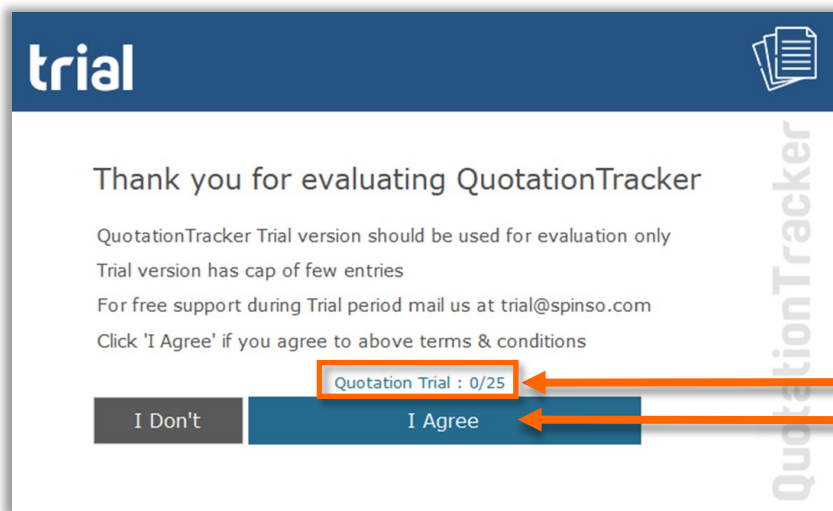
1. Index _____ Pg 2
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2

Go To Quotation Screen

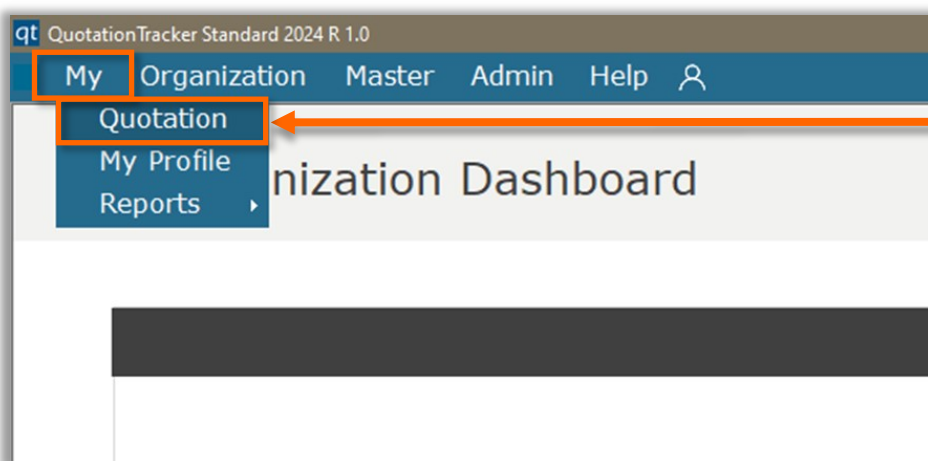


Enter Login name and password
Click on **Login**



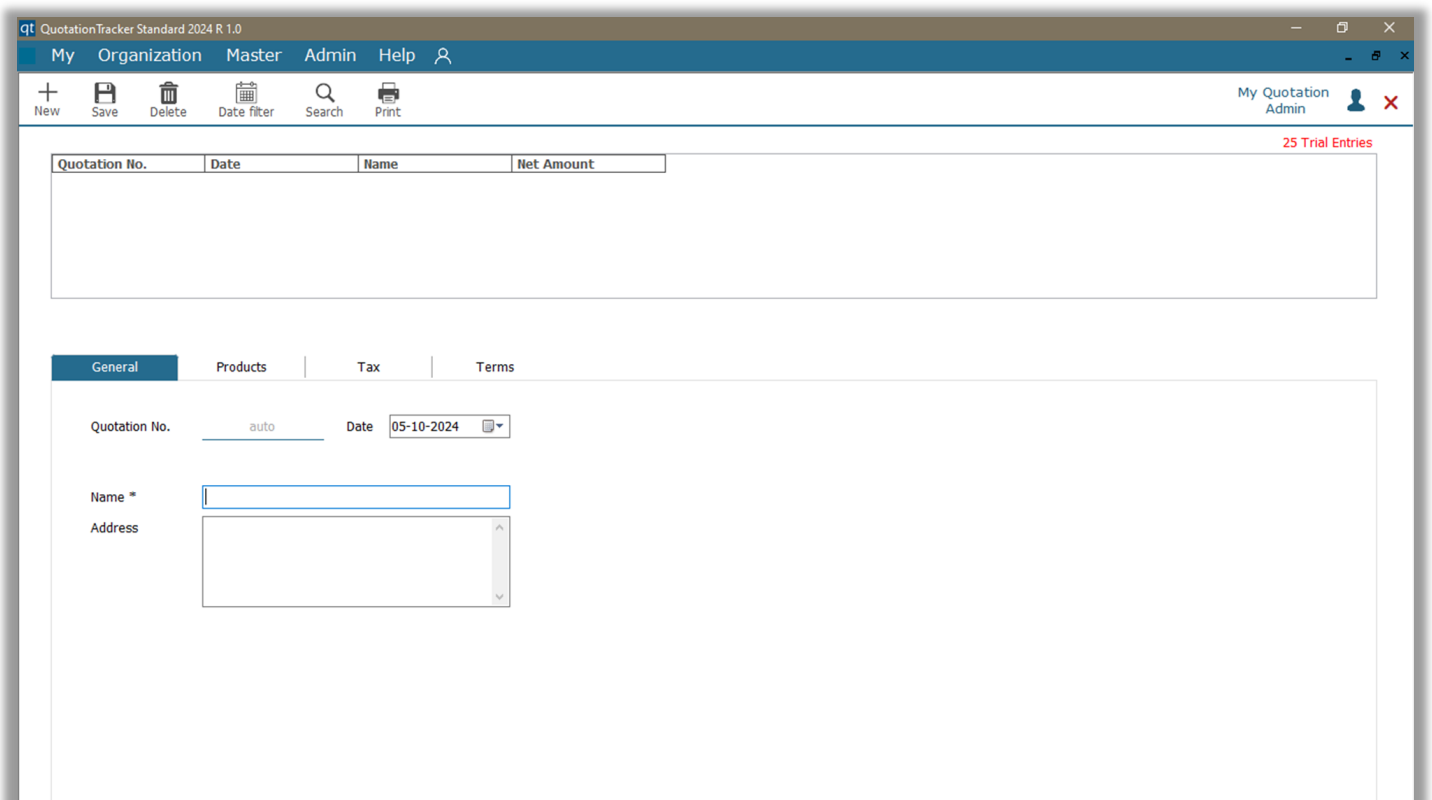
Please note: this is a trial edition,
has a cap of 25 trial entries.

No. of trial entries used.
Click on **I Agree**



Go to
My > Quotations

Quotation Screen



qt QuotationTracker Standard 2024 R 1.0

My Organization Master Admin Help

New Save Delete Date filter Search Print

My Quotation Admin

25 Trial Entries

Quotation No.	Date	Name	Net Amount
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General Products Tax Terms

Quotation No. auto Date 05-10-2024

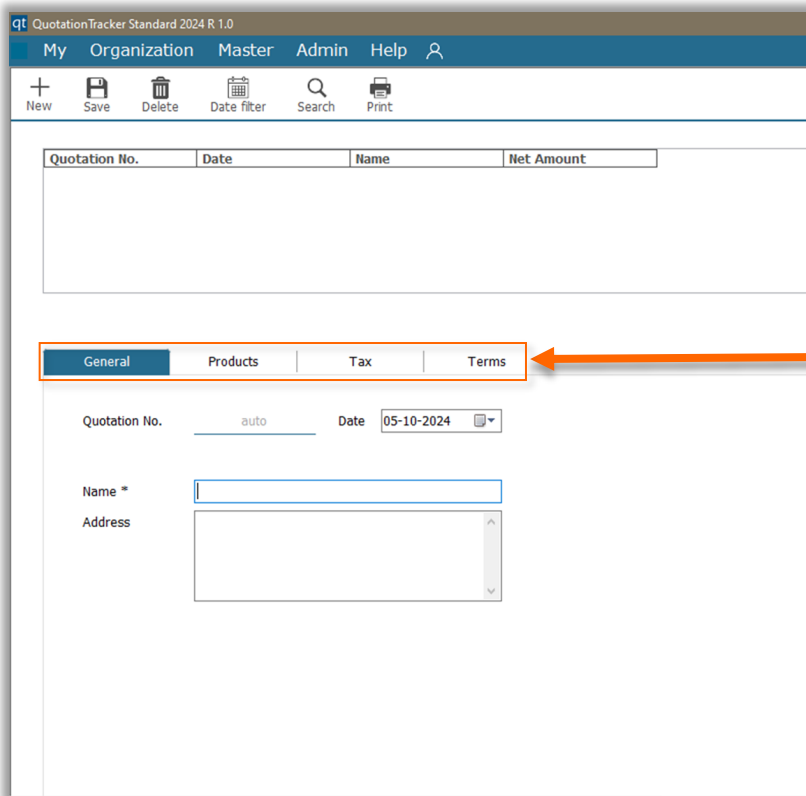
Name *

Address

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

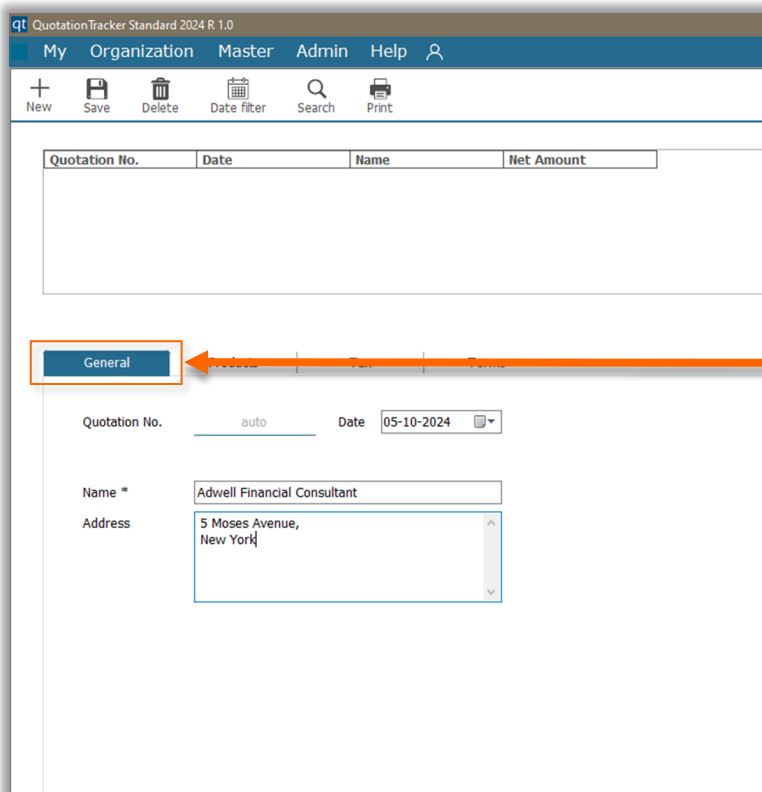
3

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.

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My Quotation Admin

25 Trial Entries

Quotation No.	Date	Name	Net Amount

Products Tab:
Click on the plus icon to add products.
Click on **Add Product**

General **Products**

Products *

Product	Model	Quantity	Rate	Amount	Description

Add Product
Edit Product
Delete Product

Quotation Products

Ok

Product * CCTV

Model EEK55412

Quantity 1

Rate 2000

Amount 2000

Description Night Vision Camera

- 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.

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My Quotation Admin 25 Trial Entries

Quotation No.	Date	Name	Net Amount

General Products Tax Terms

Products *

Product	Model	Quantity	Rate	Amount	Description
CCTV	E EK55412	1	2000	2000	Night Vision Camera

Product is added to the list.

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

Tax Tab:

To add tax on quotation

Click on the plus icon > select **Add Tax**

Quotation Tax window will open.

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My Quotation Admin 25 Trial Entries

Quotation No.	Date	Name	Net Amount

General Products Tax

Tax

Tax Name	%	Amount

Add Tax Edit Tax Delete Tax

Gross Amount 2000
Tax Amount 0
Total 2000

Quotation Tax

✓ Ok

Tax * GST

Tax On All Items

Taxable Amount * 2000

Percentage 18

Tax Amount * 360

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.

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My Organization Master Admin Help

New Save Delete Date filter Search Print

My Quotation Admin

25 Trial Entries

Quotation No.	Date	Name	Net Amount

General Products **Tax** Terms

Tax		
Tax Name	%	Amount
GST	18	360

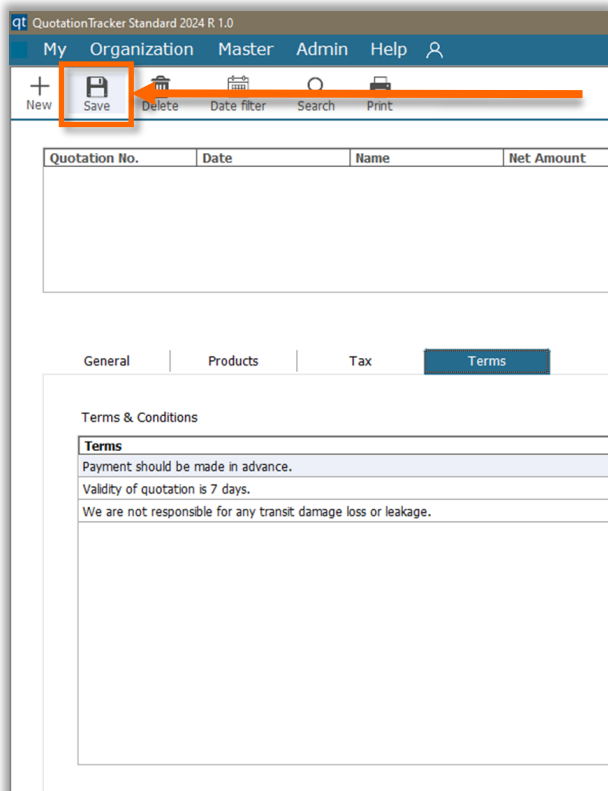
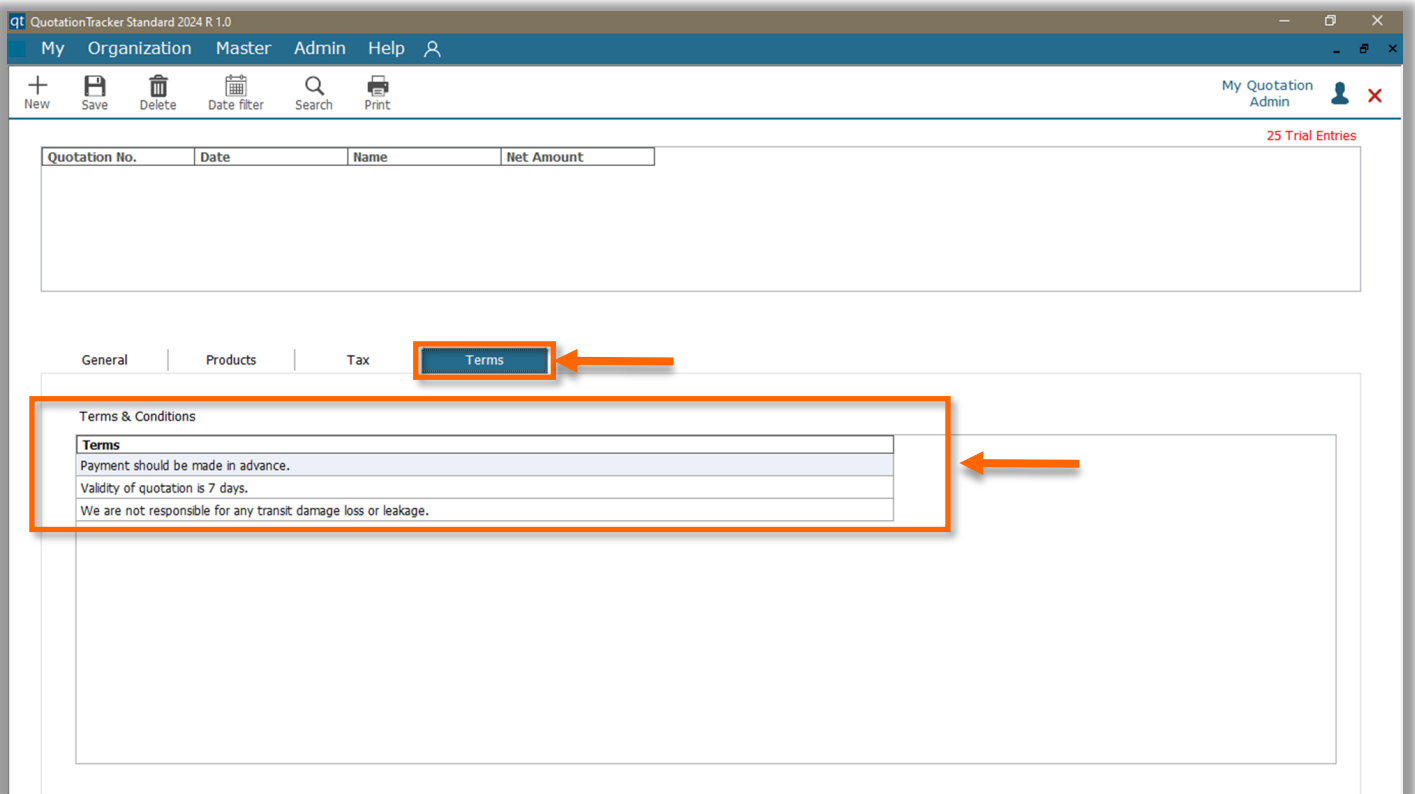
Gross Amount 2000

Tax Amount 360

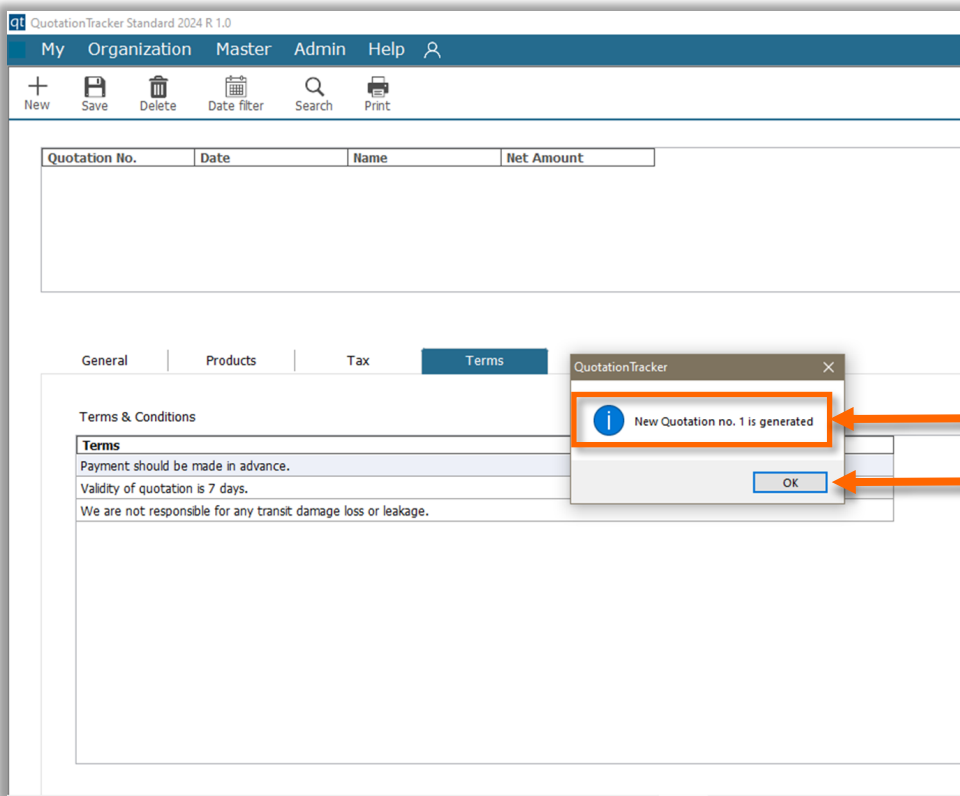
Total 2360

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

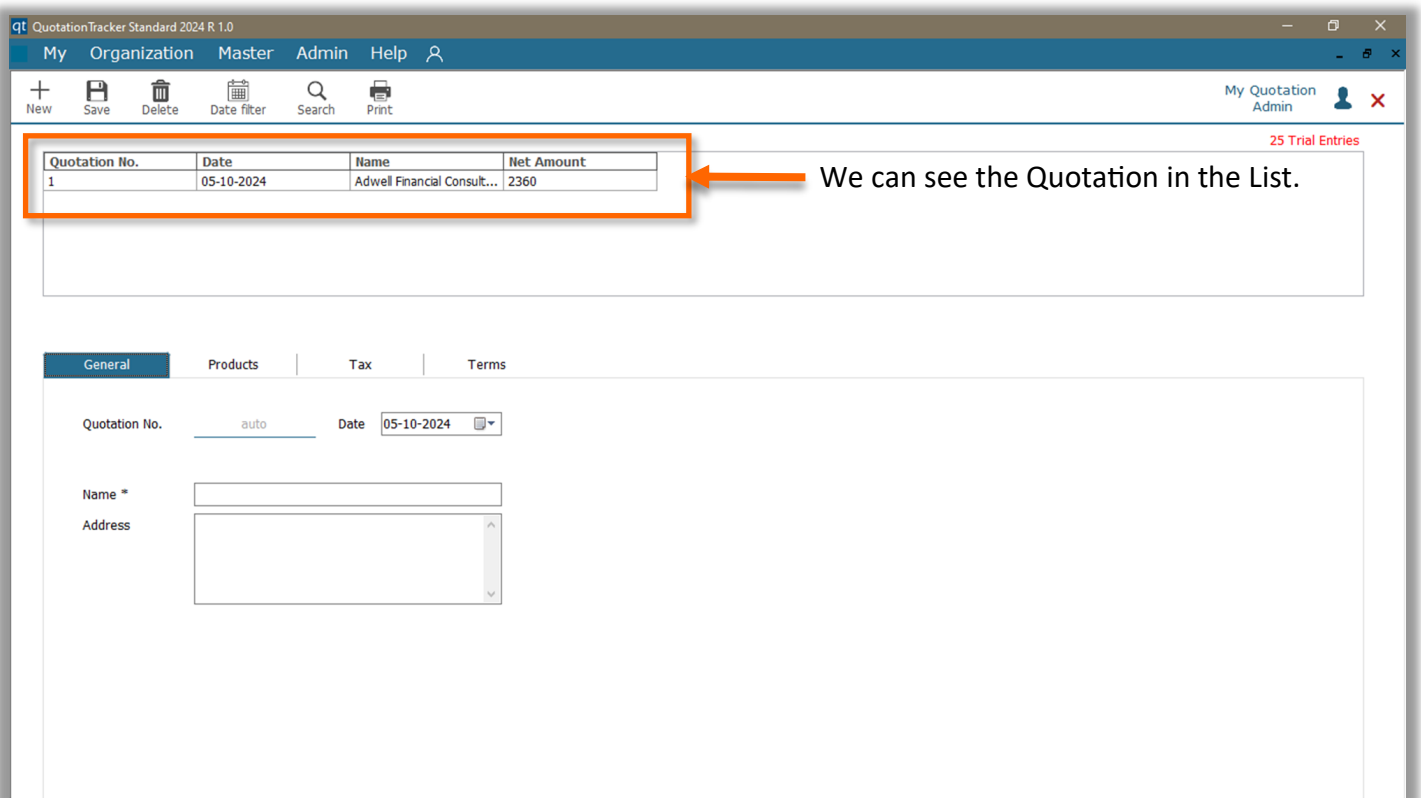
Terms tab:
Terms and conditions for the quotation.



Click on **save**.



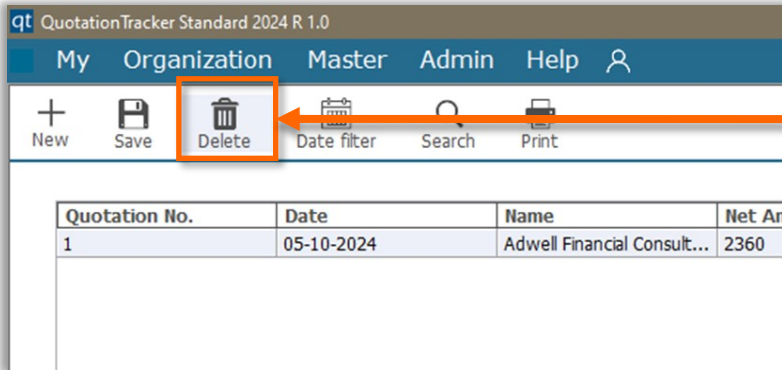
Quotation record is saved..!
 Quotation No. generated.
 Click on **save**.



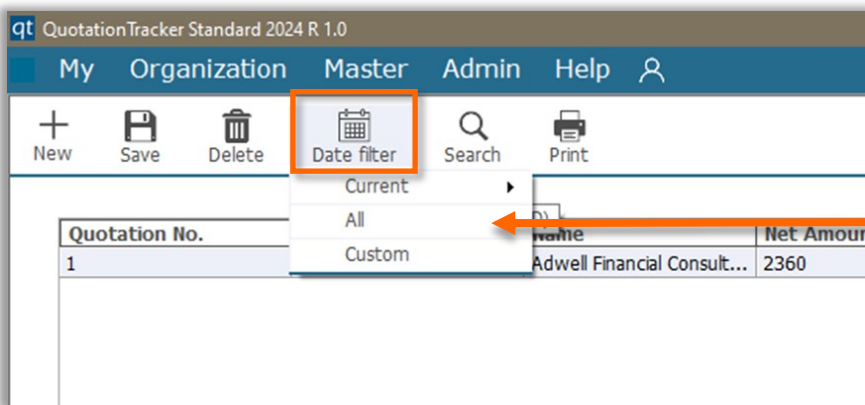
We can see the Quotation in the List.

4

Additional Information



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

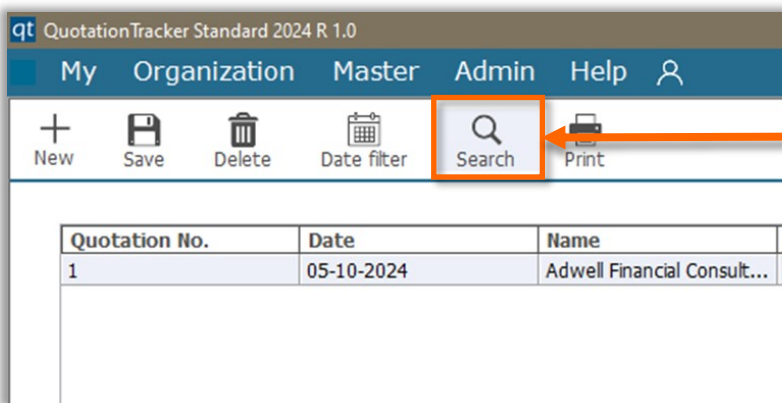


Date Filter:

Filter the Quotation records by date.

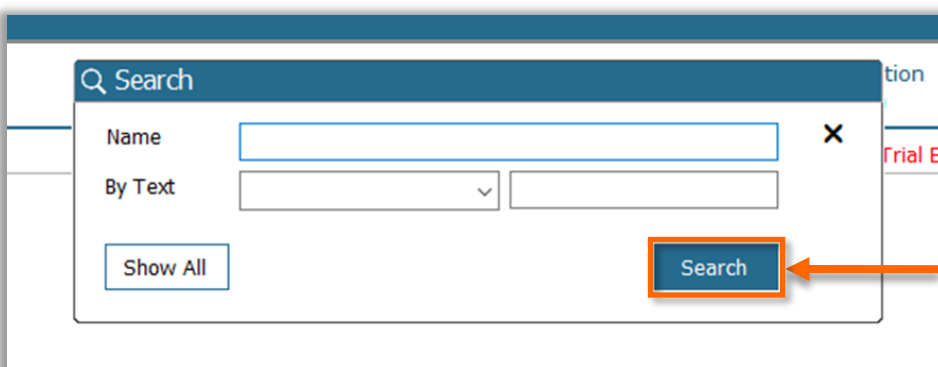
Custom Date Filter:

Show data from a specific period of time.

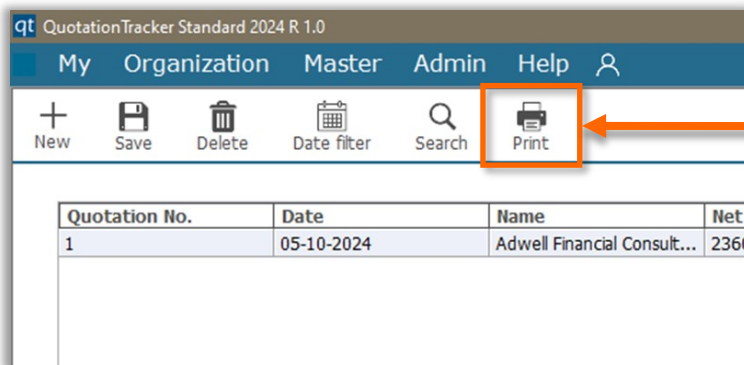


Search:

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**.

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>