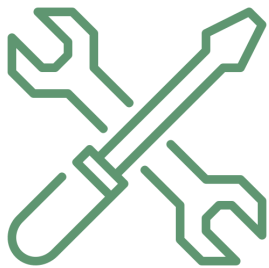# SPINSO

Standard edition

ServiceDesk

manage warranties & AMC

Entering a Quotation (Trial edition)

Step by step guide to enter a Quotation in ServiceDesk Standard.
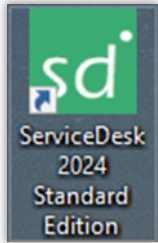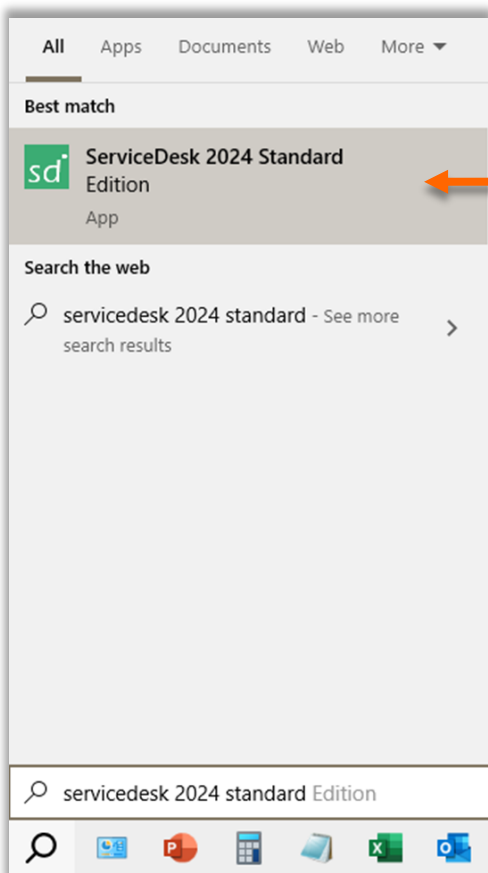
1 | INDEX
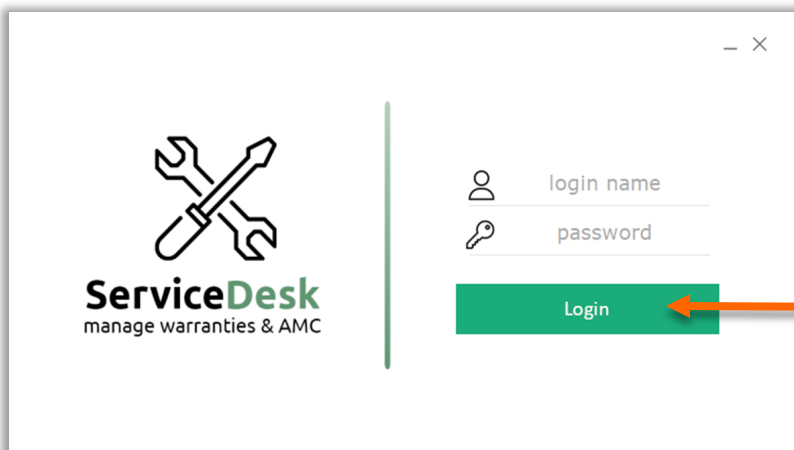
Steps

2 LOGIN

Double Click on **ServiceDesk** icon, on your desktop.

or

You can also launch the application from
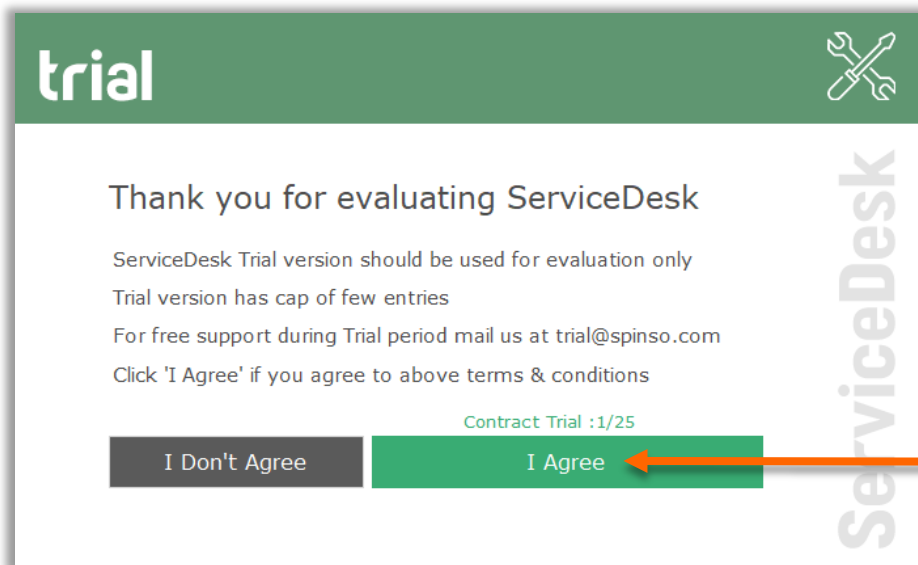**Start - Program Files - Spinso - ServiceDesk**
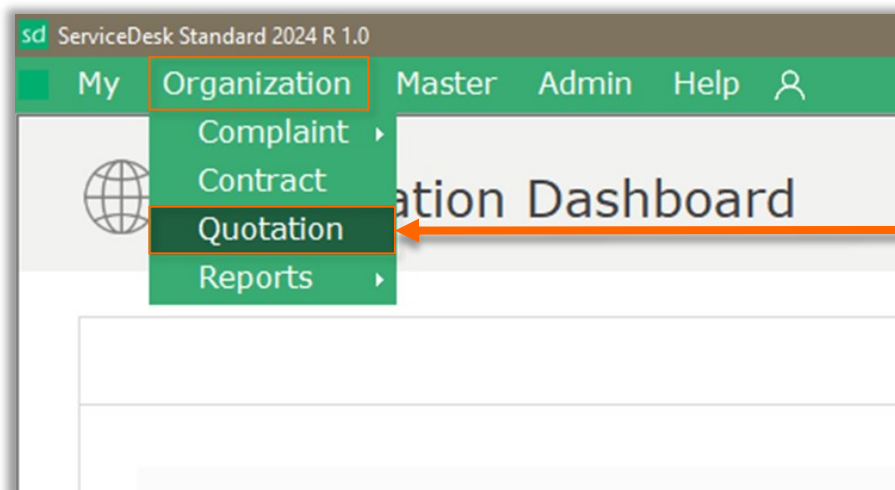
Enter Login name and password

Click on **Login**
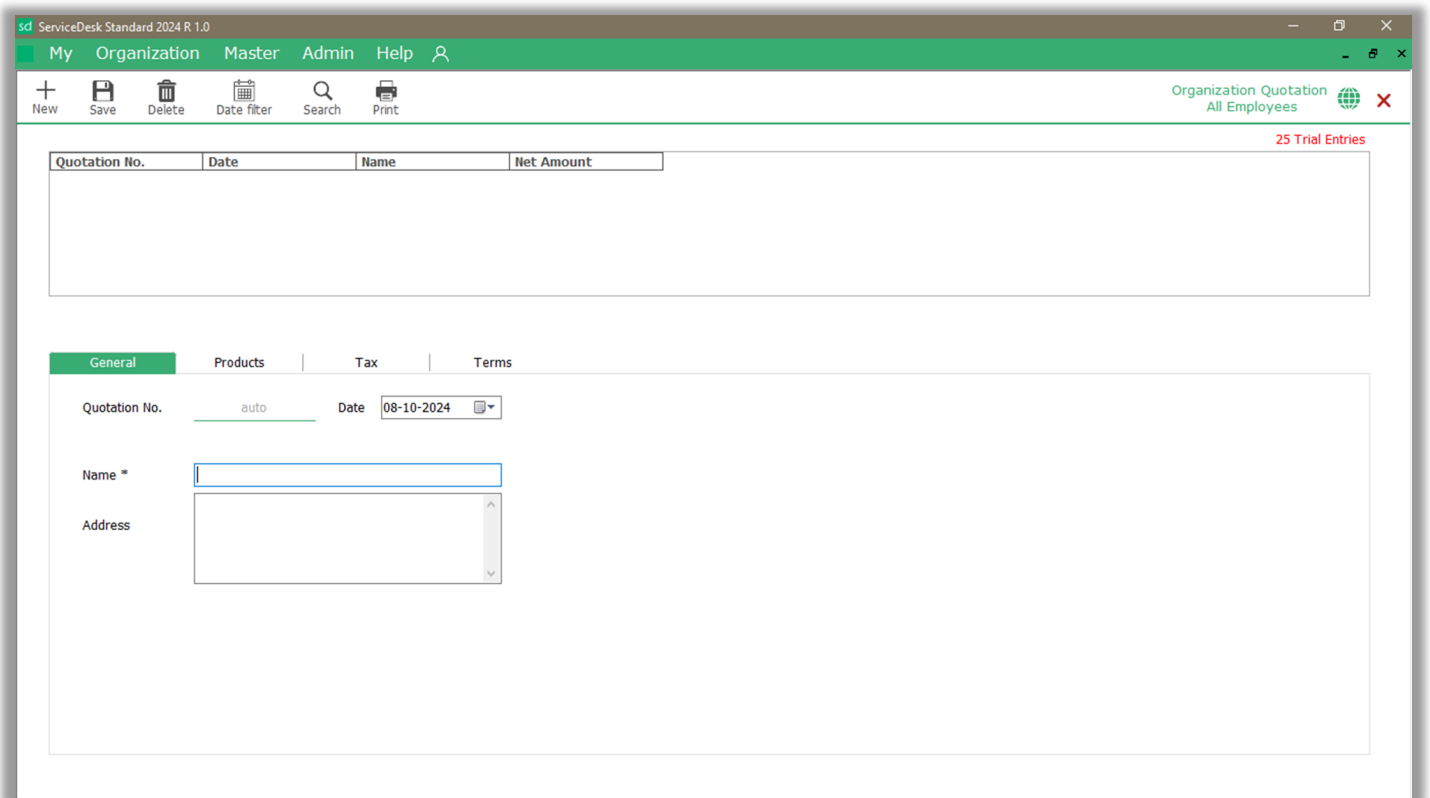
3 | Go to Quotation Screen

trial

Thank you for evaluating ServiceDesk

ServiceDesk Trial version should be used for evaluation only

Trial version has cap of few entries

For free support during Trial period mail us at trial@spinso.com

Click 'I Agree' if you agree to above terms & conditions

Contract Trial :1/25

| I Don't Agree | I Agree |

Click on **I Agree**

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sd ServiceDesk Standard 2024 R 1.0

My **Organization** Master Admin Help

Complaint ▸
Contract
Quotation
Reports ▸

...ation Dashboard

Go to

Organization > Quotation

Quotation Screen

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

4 Entering a Quotation
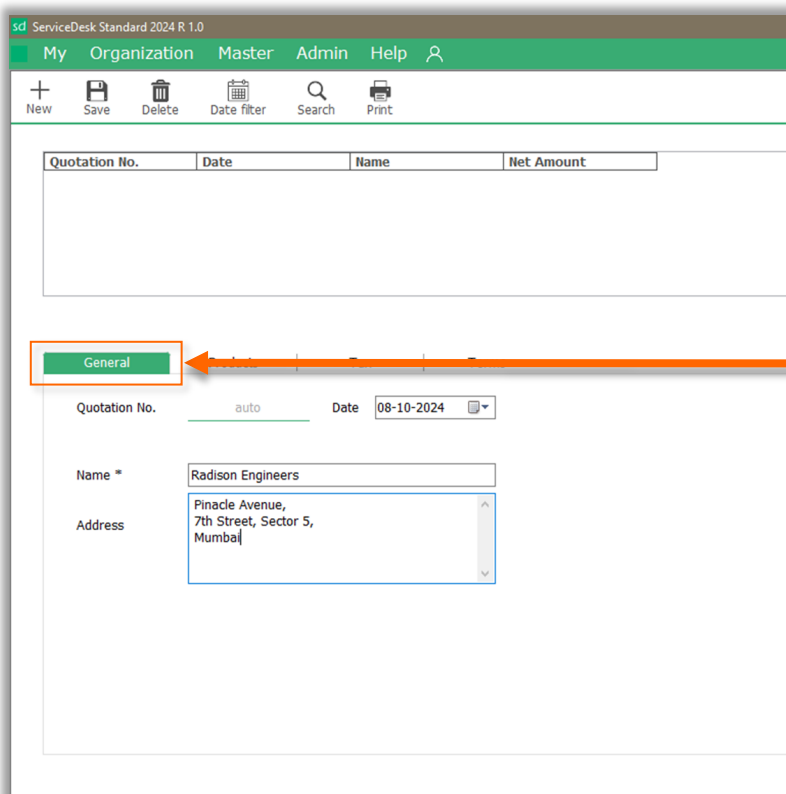
Here, we can see four tabs:

- **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
- 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.

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**
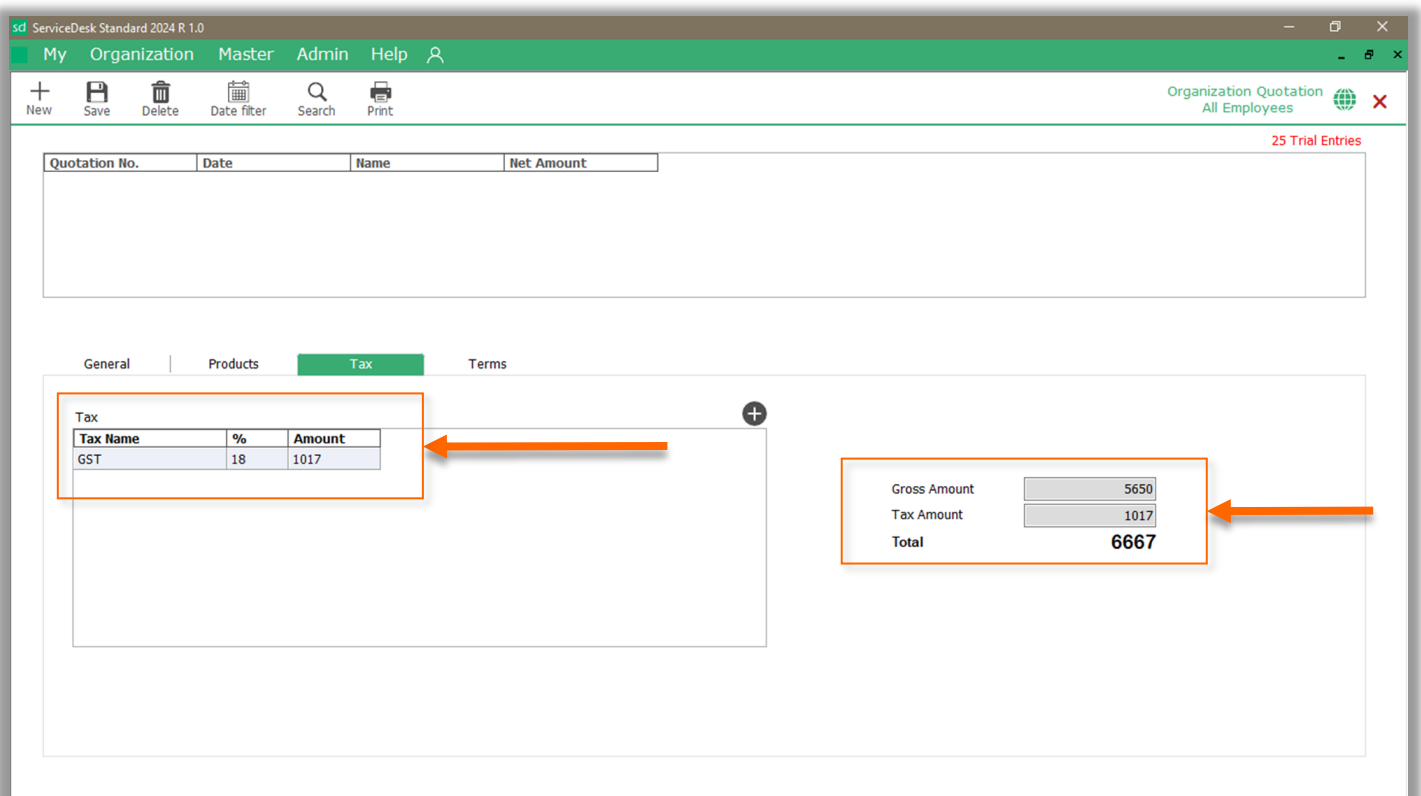**Quotation Tax** window will open.

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.
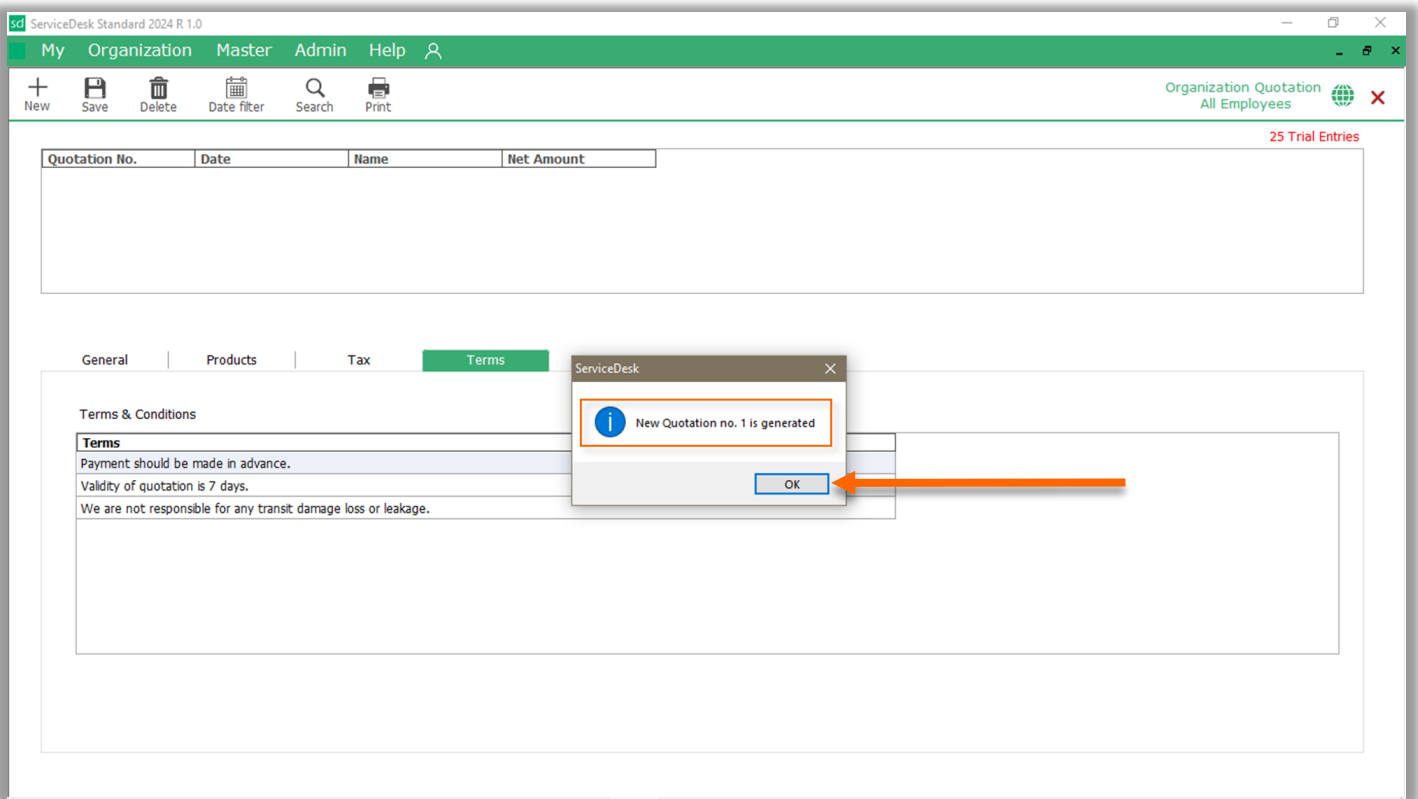
Terms:

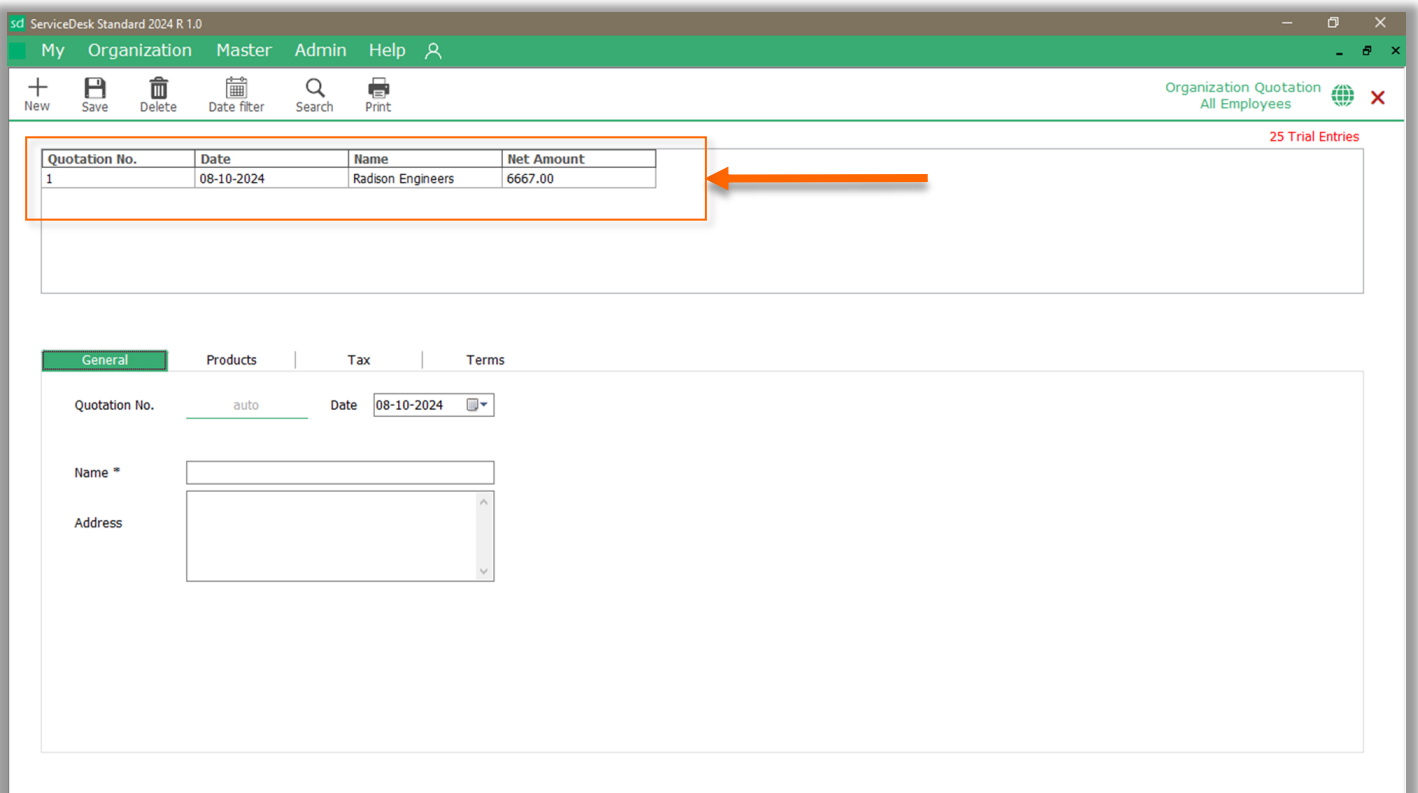Terms and conditions can be seen in this tab.
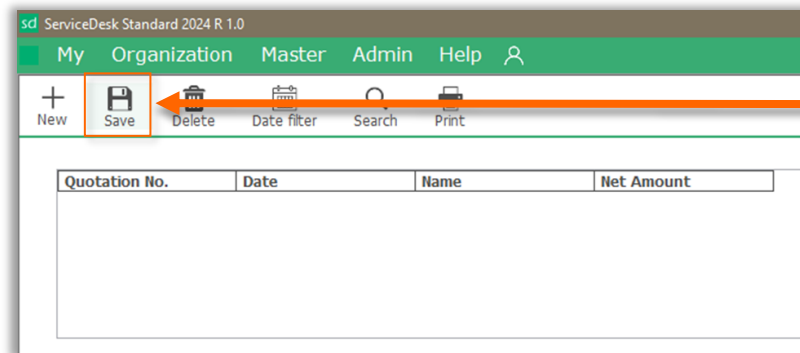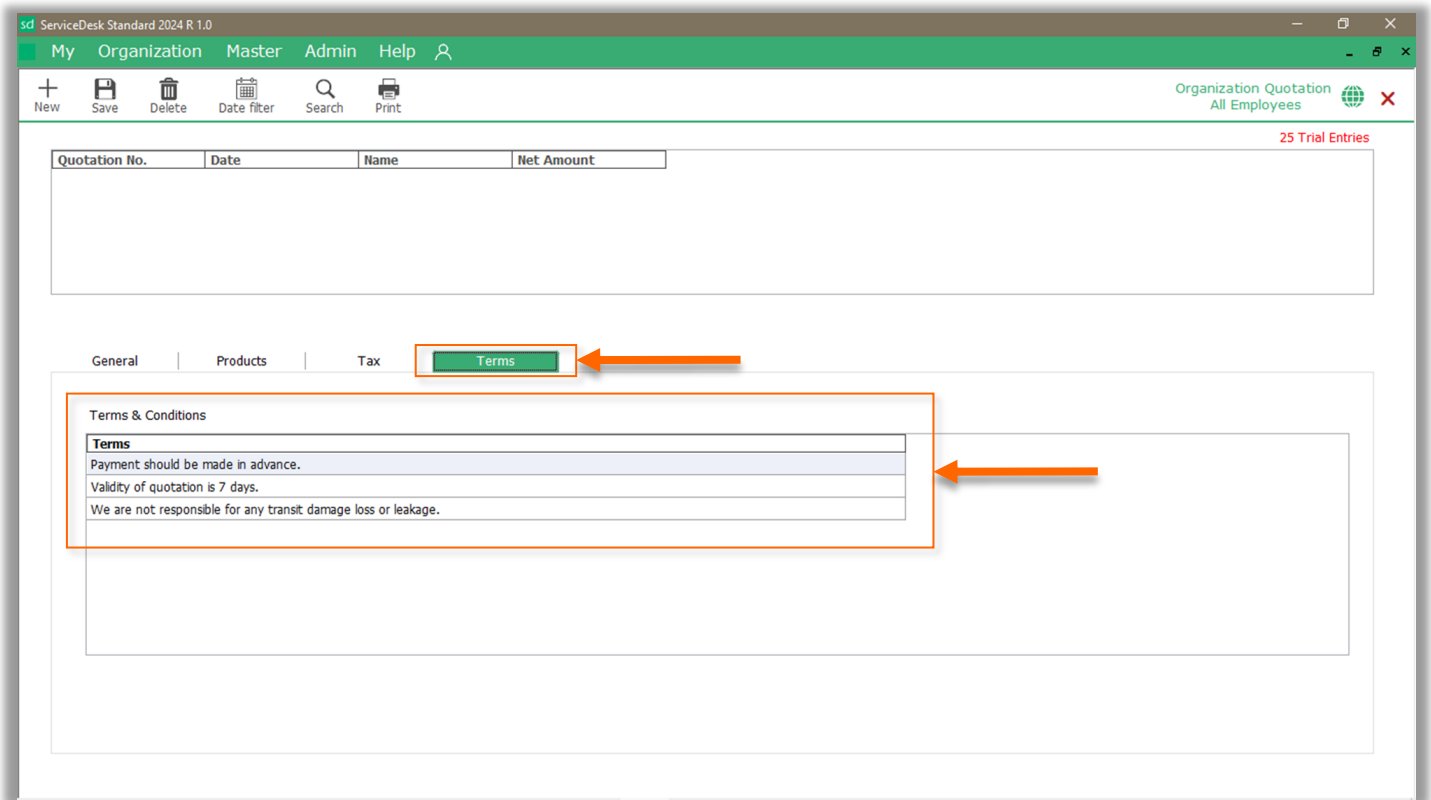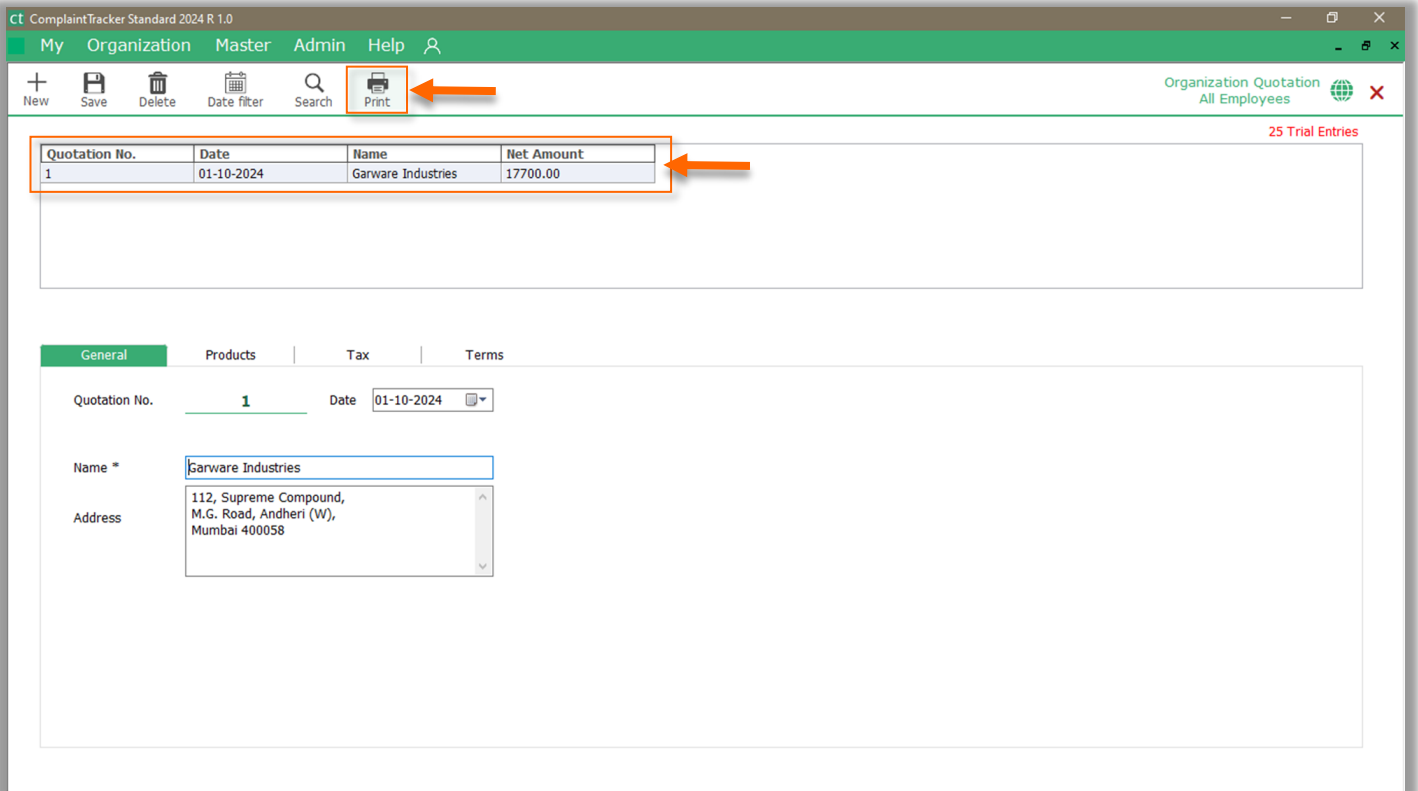

Click on **Save.**

Quotation No. generated.
Quotation is saved successfully.
Click on **Ok**.

All quotations can be seen in the list.

To print the quotation
select the quotation from the list, then click in **Print**.
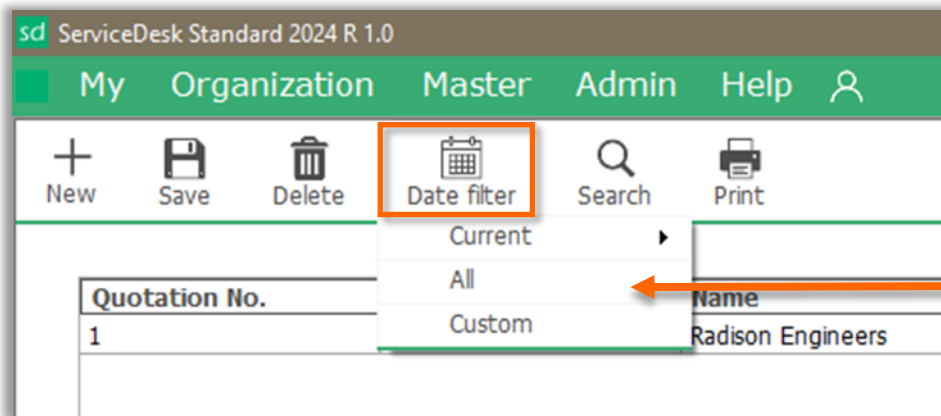
Congratulations

You have successfully entered your first Quotation in ServiceDesk Standard.
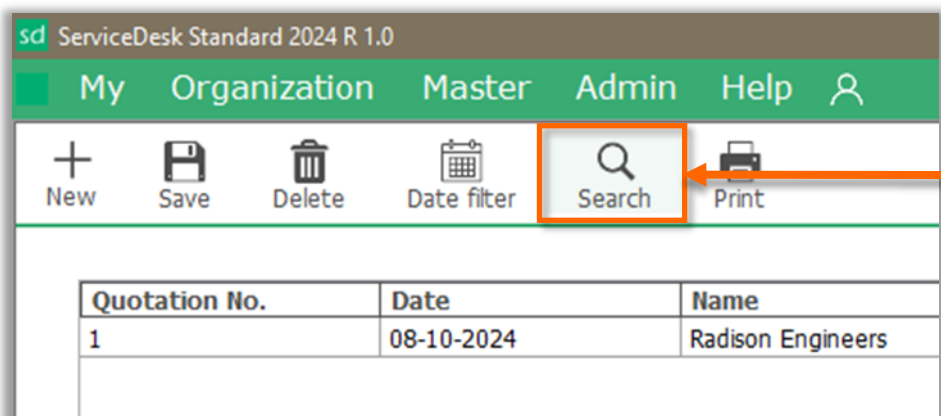
5 Additional Information
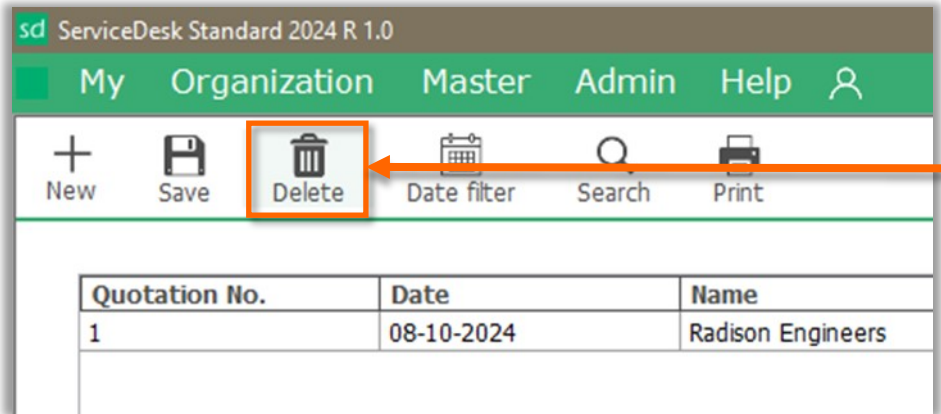
Delete: to delete a Quotation Select a record from the list then click on **delete**.
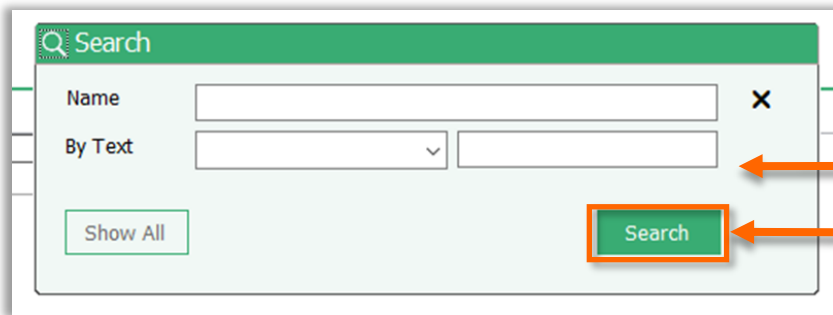

Date Filter: Filter the records by date.

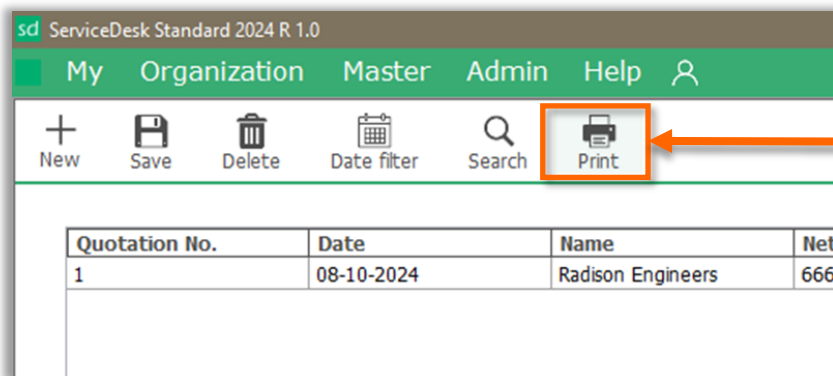**Custom Date Filter**: Fetch records from a specific period of time.

Search: Find or search Quotation by name, Product, Brand, etc.

Enter the name or select the product of the Quotation to find then click on **search.**

Print: Print your Quotation, select a record then click on **Print**.

SPINSO

Thank you

We hope this was helpful. 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**