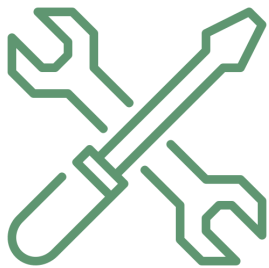


SPINSO[®]



Standard edition

ServiceDesk
manage warranties & AMC



Entering a Quotation (Trial edition)

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

1

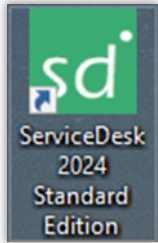
INDEX

Steps

- 1. Index _____ Pg 2
- 2. Login _____ Pg 3
- 3. Go to Quotation Screen _____ Pg 4
- 4. Entering a Quotation _____ Pg 6
- 5. Additional Information _____ Pg 14

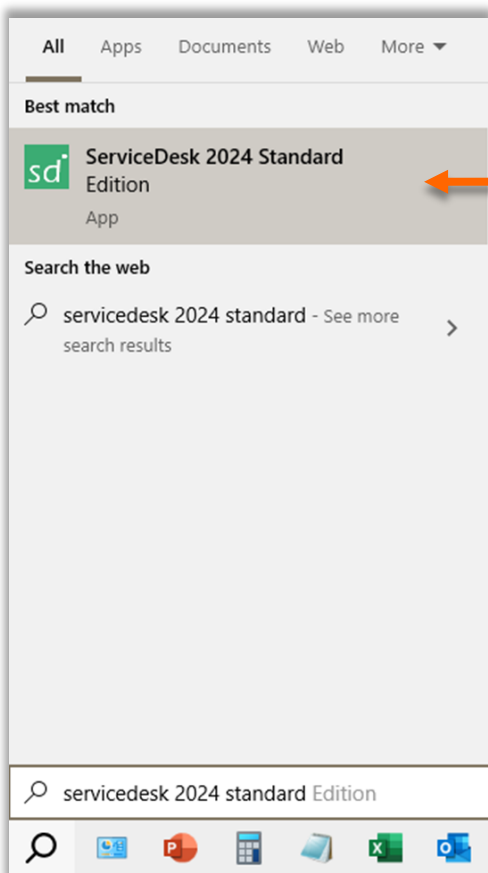
2

LOGIN

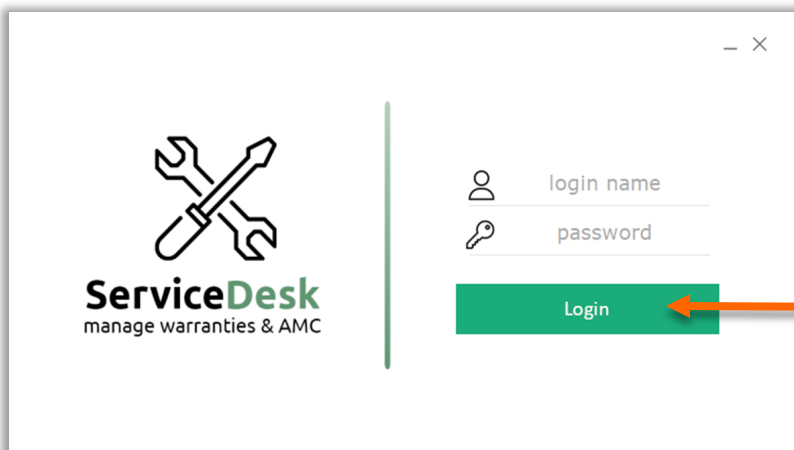


Double Click on **ServiceDesk** icon, on your desktop.

or



You can also launch the application from **Start - Program Files - Spinso - ServiceDesk**

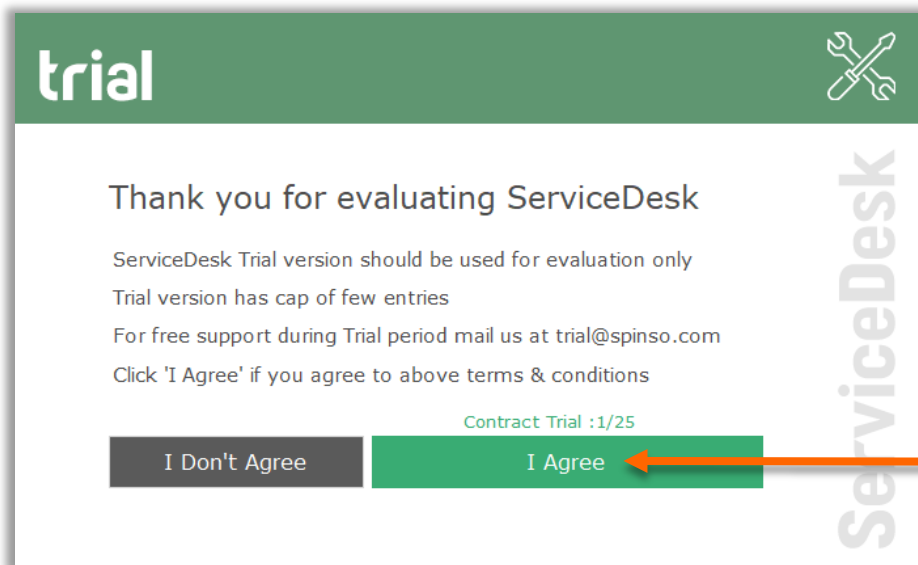


Enter Login name and password

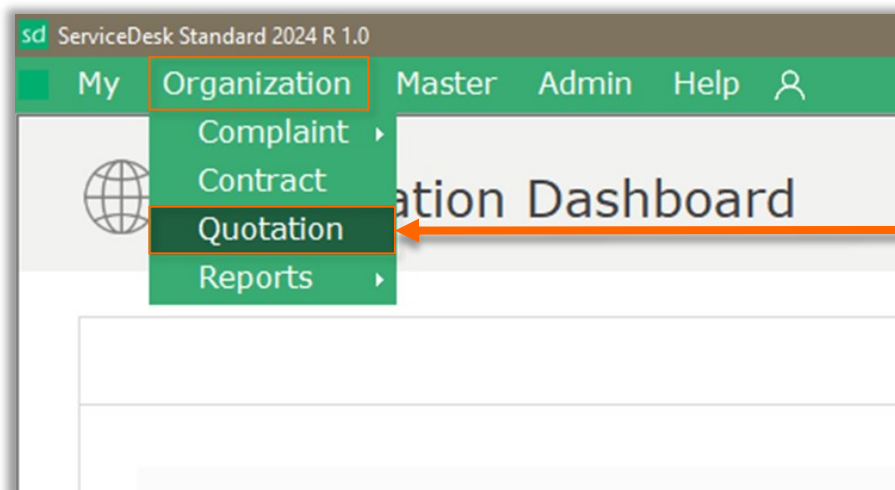
Click on **Login**

3

Go to Quotation Screen



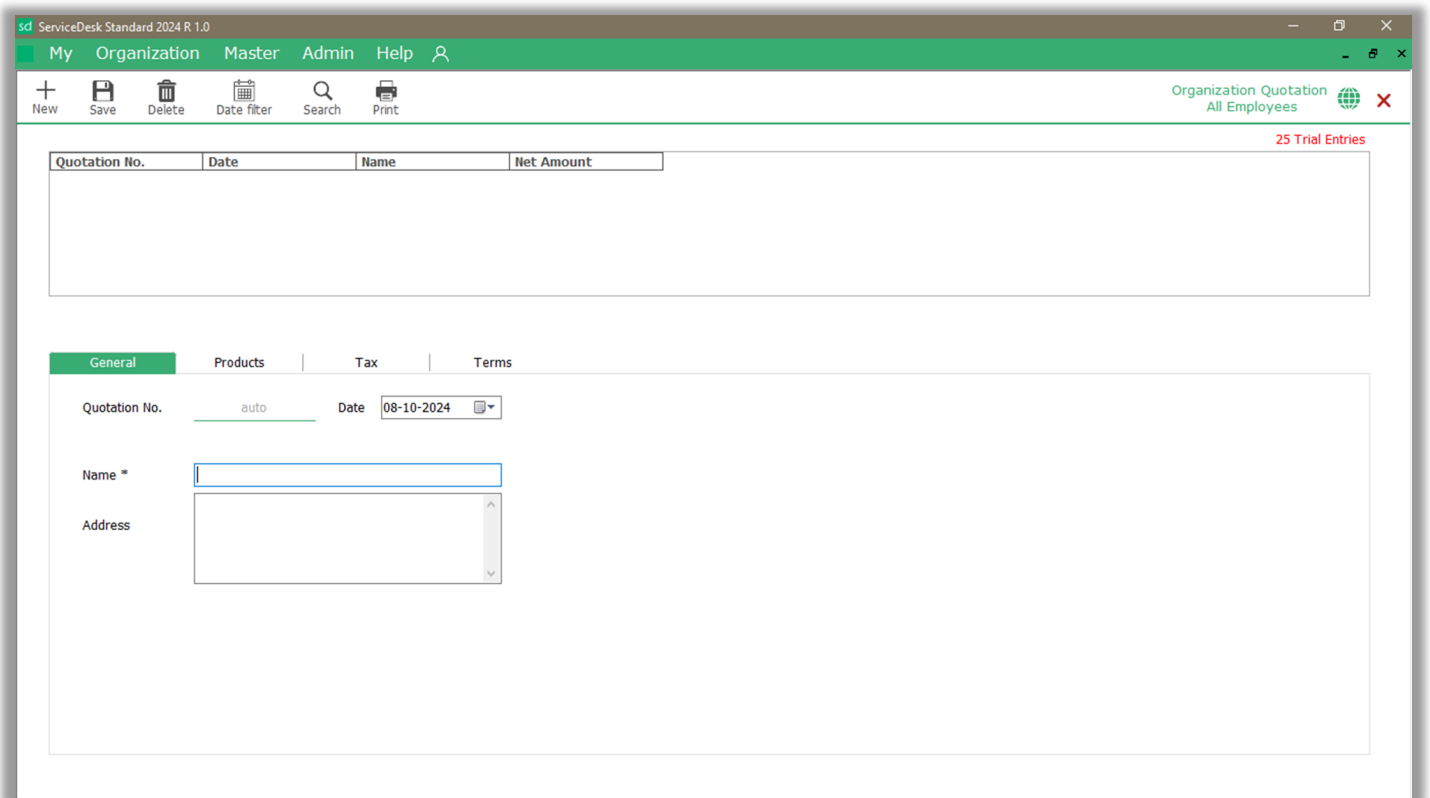
Click on **I Agree**



Go to

Organization > Quotation

Quotation Screen

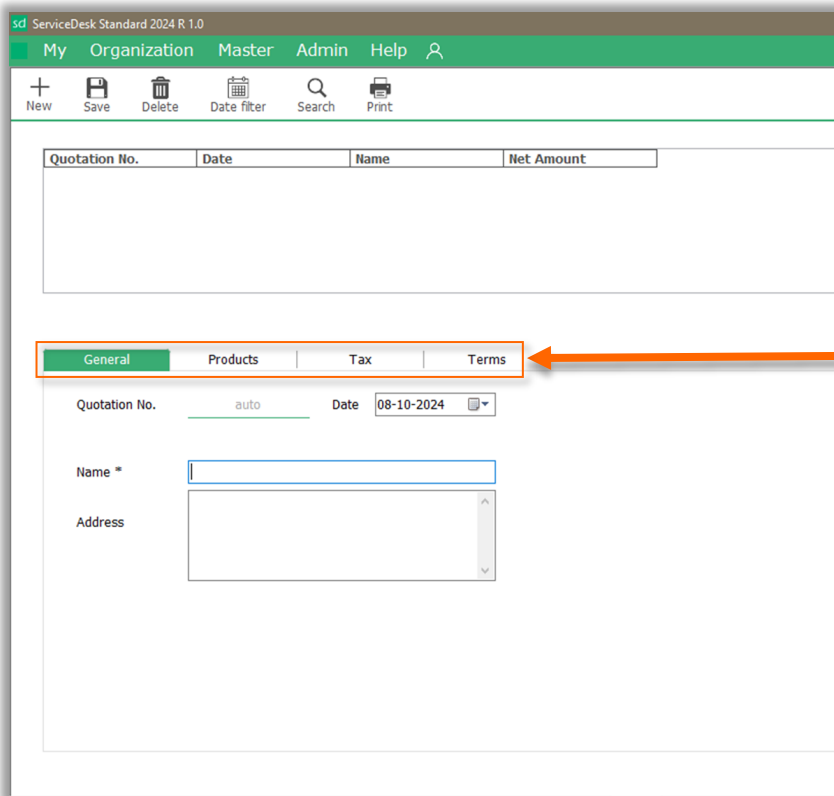


The screenshot shows the ServiceDesk Standard 2024 R 1.0 interface. The top navigation bar includes 'My', 'Organization', 'Master', 'Admin', and 'Help'. Below this is a toolbar with icons for 'New', 'Save', 'Delete', 'Date filter', 'Search', and 'Print'. The main content area is titled 'Organization Quotation All Employees' and shows a table with columns for 'Quotation No.', 'Date', 'Name', and 'Net Amount'. Below the table are tabs for 'General', 'Products', 'Tax', and 'Terms'. The 'General' tab is active, showing fields for 'Quotation No.' (set to 'auto'), 'Date' (set to '08-10-2024'), 'Name *', and 'Address'. A red notification in the top right corner indicates '25 Trial Entries'.

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

4

Entering a Quotation



sd ServiceDesk Standard 2024 R 1.0

My Organization Master Admin Help

New Save Delete Date filter Search Print

Quotation No.	Date	Name	Net Amount

General Products Tax Terms

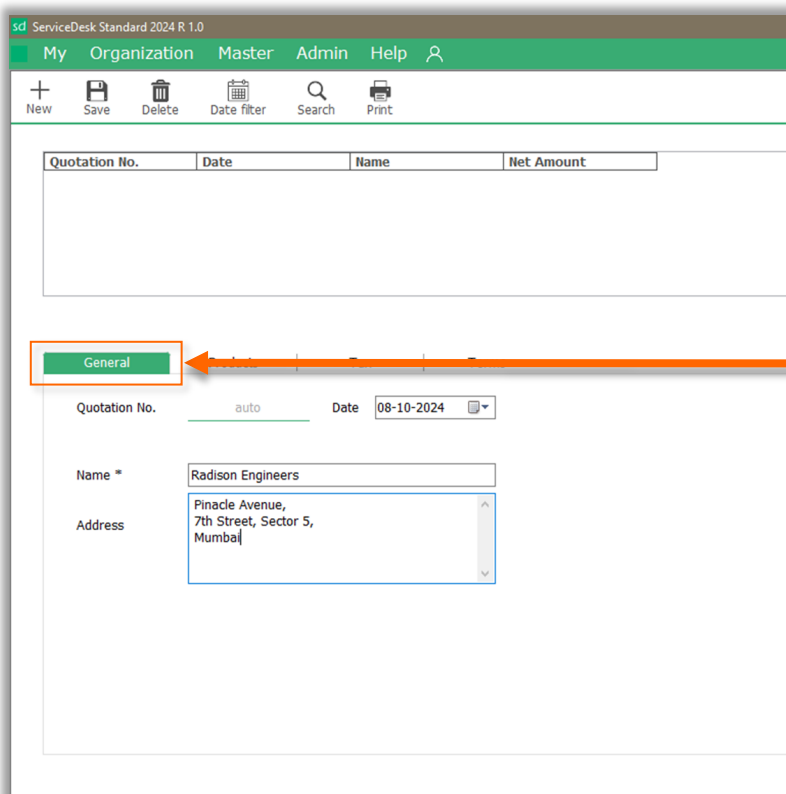
Quotation No. auto Date 08-10-2024

Name *

Address

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



sd ServiceDesk Standard 2024 R 1.0

My Organization Master Admin Help

New Save Delete Date filter Search Print

Quotation No.	Date	Name	Net Amount

General Products Tax Terms

Quotation No. auto Date 08-10-2024

Name * Radison Engineers

Address Pinacle Avenue, 7th Street, Sector 5, Mumbai

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.

sd ServiceDesk Standard 2024 R 1.0

My Organization Master Admin Help

New Save Delete Date filter Search Print

Organization Quotation All Employees 25 Trial Entries

Quotation No.	Date	Name	Net Amount

General Products Tax Terms

Products *

Product	Brand	Model	Quantity	Rate	Amount	Description
CCTV	LG	EEEEK2223	1	5650	5650	Amc for 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.

sd ServiceDesk Standard 2024 R 1.0

My Organization Master Admin Help

New Save Delete Date filter Search Print

Organization Quotation All Employees 25 Trial Entries

Quotation No.	Date	Name	Net Amount

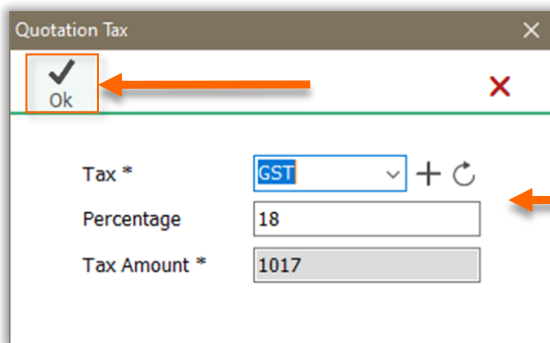
General Products Tax

Tax

Tax Name	%	Amount

Add Tax
Edit Tax
Delete Tax

Gross Amount 5650
Tax Amount 0
Total 5650



Quotation Tax

✓ Ok

Tax * GST

Percentage 18

Tax Amount * 1017

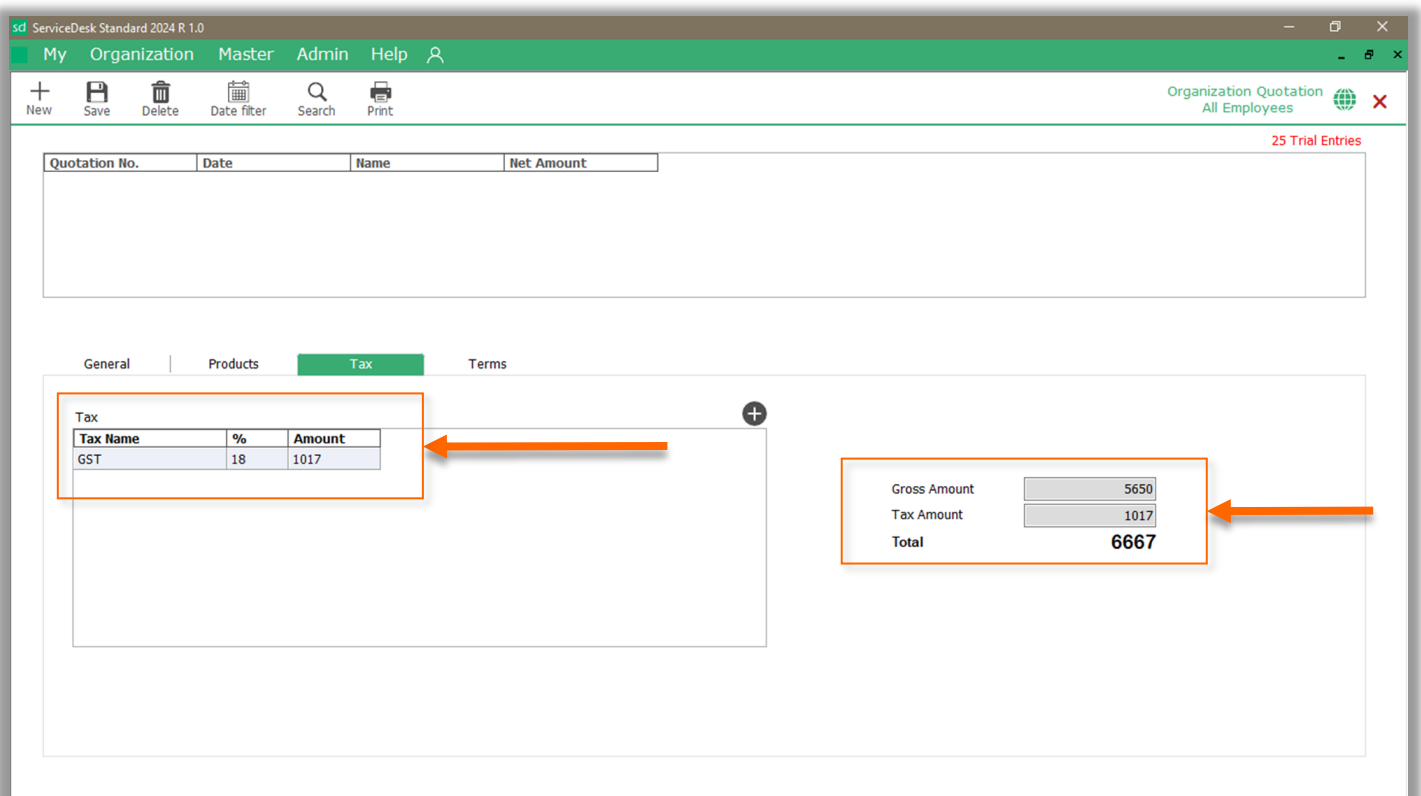
Fill tax details:

- 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.



sd ServiceDesk Standard 2024 R 1.0

My Organization Master Admin Help

Organization Quotation All Employees

25 Trial Entries

Quotation No.	Date	Name	Net Amount

General | Products | **Tax** | Terms

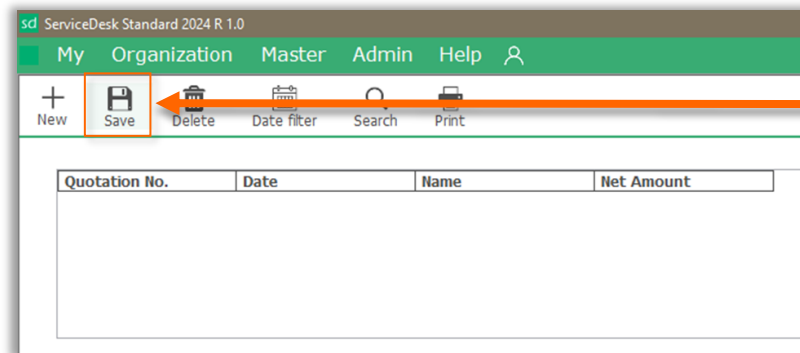
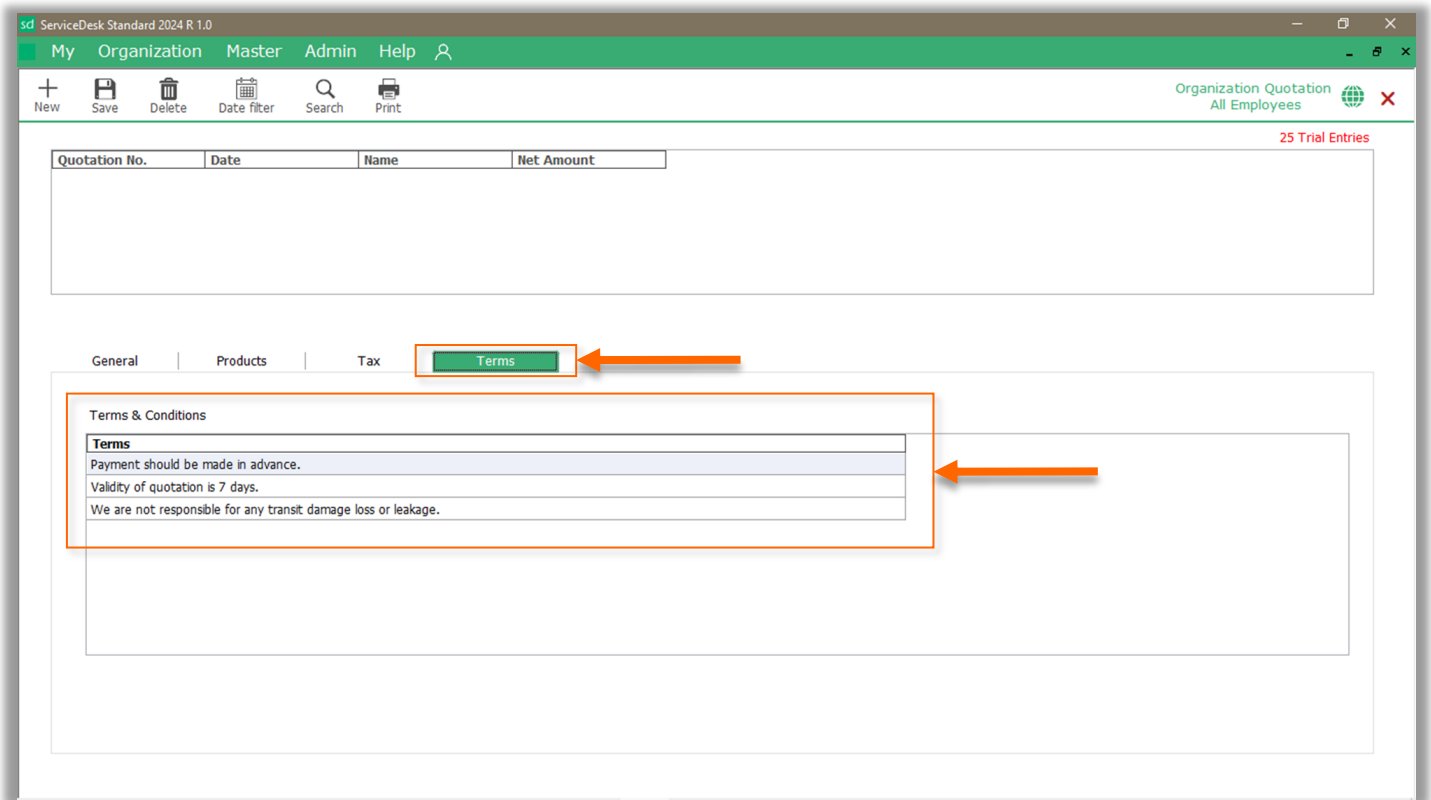
Tax Name	%	Amount
GST	18	1017

Gross Amount	5650
Tax Amount	1017
Total	6667

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

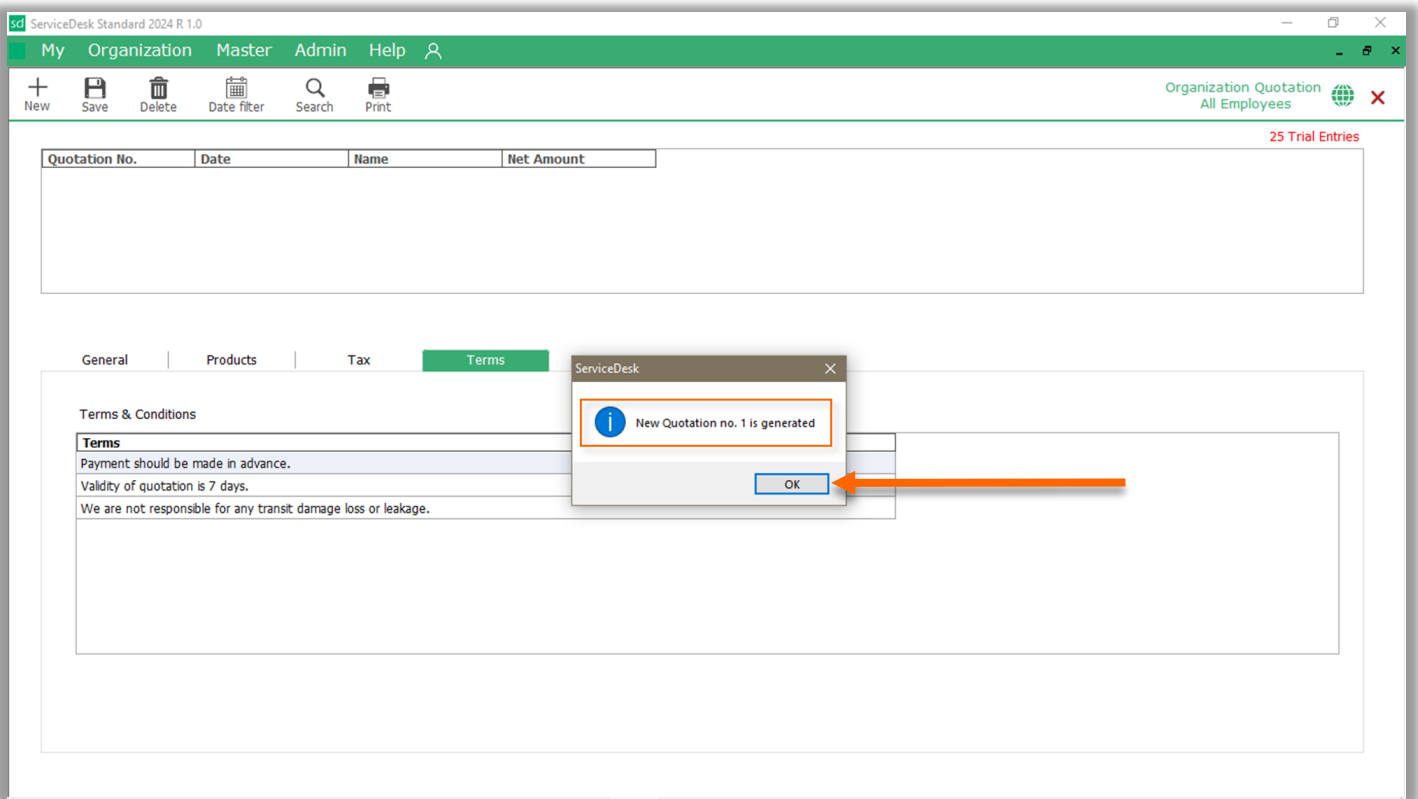
Terms:

Terms and conditions can be seen in this tab.

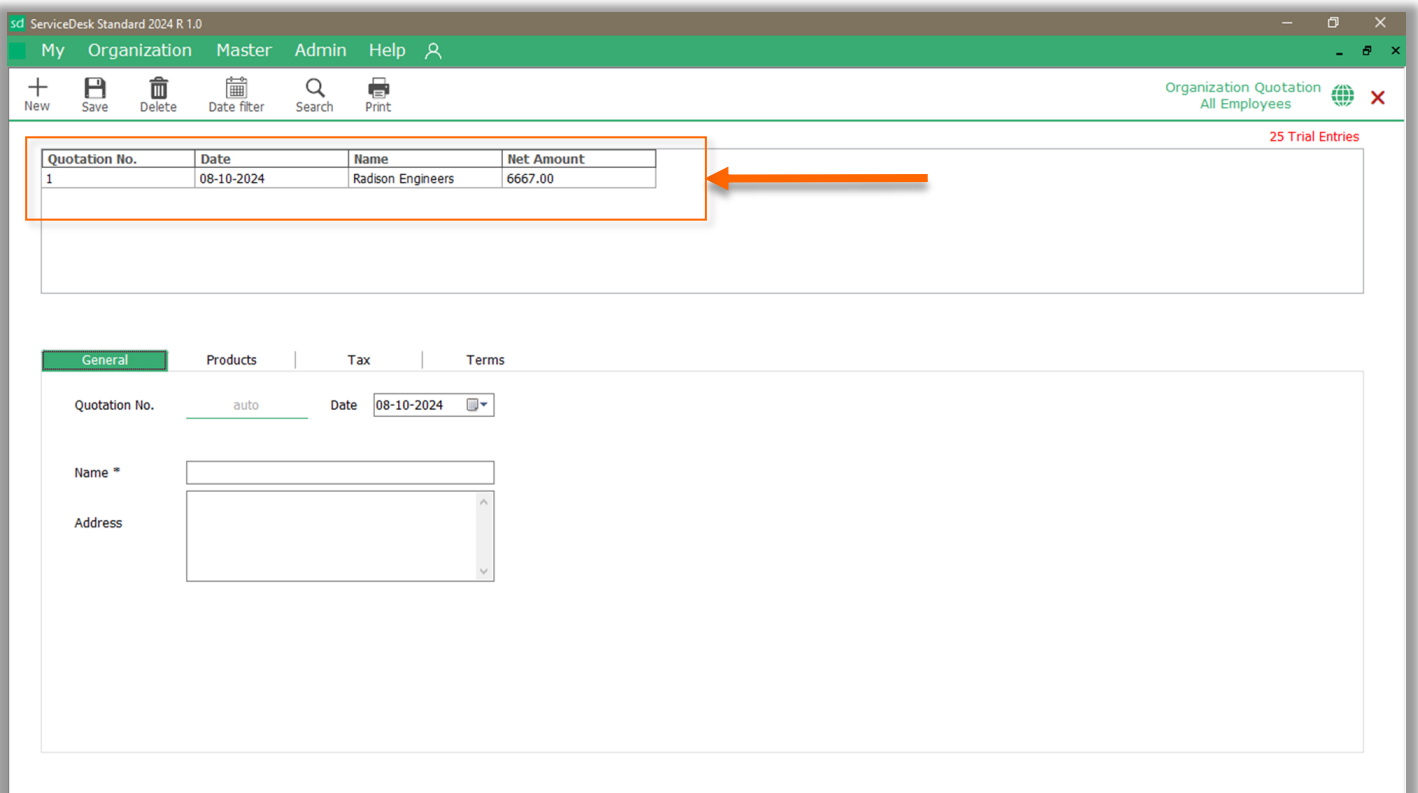


Click on **Save**.

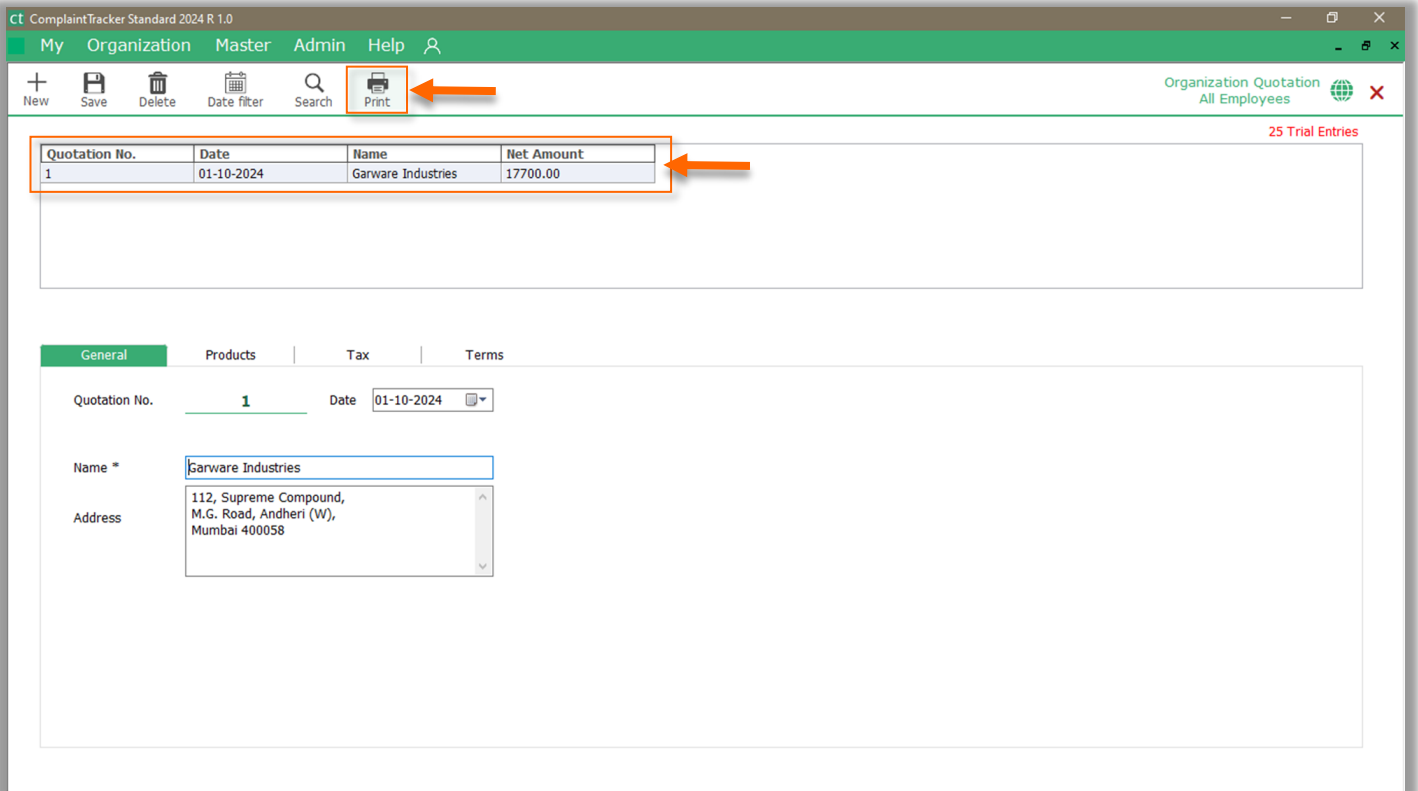
Quotation No. generated.
 Quotation is saved successfully.
 Click on **Ok**.



All quotations can be seen in the list.



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



The screenshot displays the ComplaintTracker Standard 2024 R 1.0 application window. The top menu bar includes 'My', 'Organization', 'Master', 'Admin', and 'Help'. Below the menu is a toolbar with icons for 'New', 'Save', 'Delete', 'Date filter', 'Search', and 'Print'. An orange arrow points to the 'Print' icon. The main area shows a table with one row of data:

Quotation No.	Date	Name	Net Amount
1	01-10-2024	Garware Industries	17700.00

Another orange arrow points to the first row of the table. Below the table, there are tabs for 'General', 'Products', 'Tax', and 'Terms'. The 'General' tab is active, showing a form with the following fields:

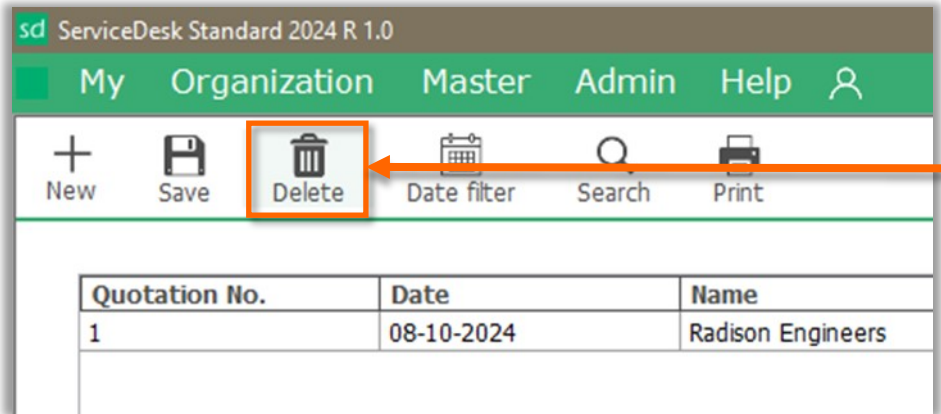
- Quotation No.: 1
- Date: 01-10-2024
- Name *: Garware Industries
- Address: 112, Supreme Compound, M.G. Road, Andheri (W), Mumbai 400058

Congratulations

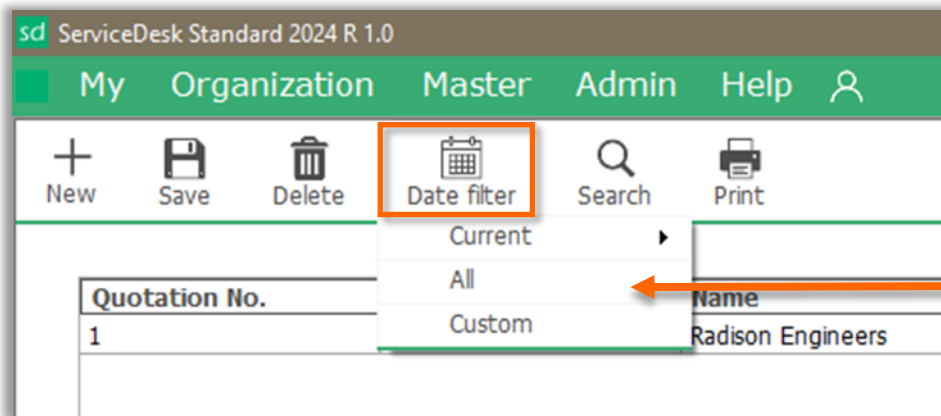
You have successfully entered your first Quotation in ServiceDesk Standard.

5

Additional Information

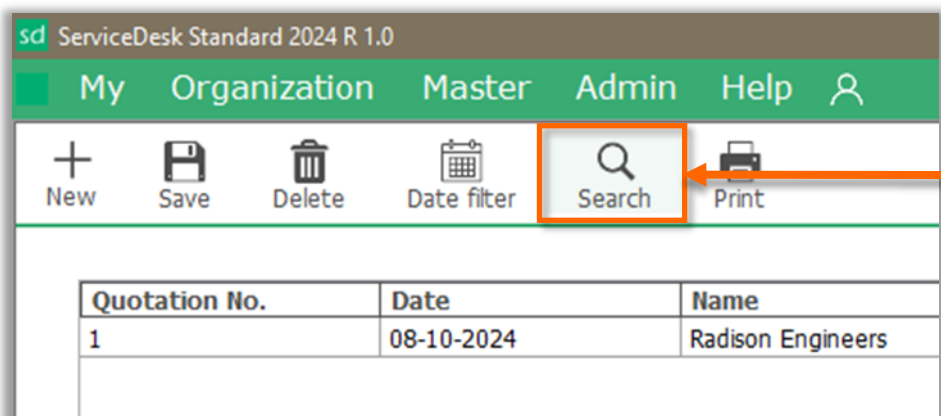


Delete: to delete a Quotation
Select a record from the list
then click on **delete**.

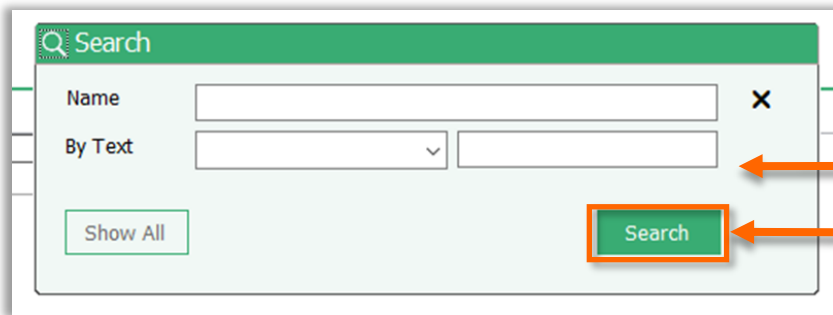


Date Filter: Filter the records by date.

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

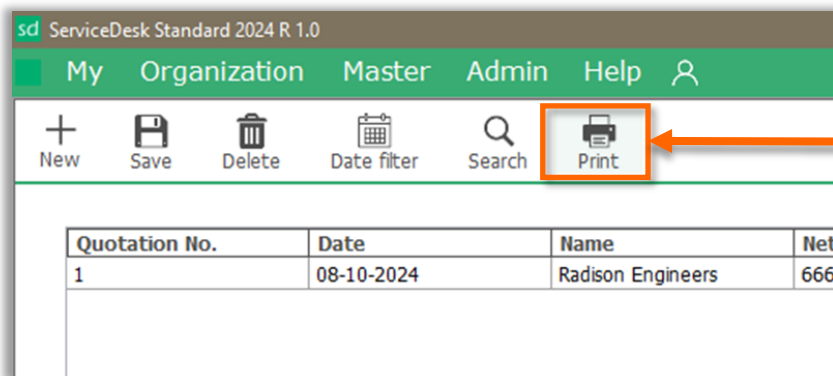


Search: Find or search Quotation by name, Product, Brand, etc.



The search dialog box has a green header with the word "Search" and a magnifying glass icon. Below the header, there are two input fields: "Name" with a text box and a close button (X), and "By Text" with a dropdown menu and a text box. At the bottom left is a "Show All" button, and at the bottom right is a "Search" button highlighted with an orange border.

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



The interface shows a top navigation bar with "My Organization Master Admin Help" and a user icon. Below this is a toolbar with icons for "New", "Save", "Delete", "Date filter", "Search", and "Print". The "Print" icon is highlighted with an orange border. Below the toolbar is a table with the following data:

Quotation No.	Date	Name	Net
1	08-10-2024	Radison Engineers	6662

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

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>