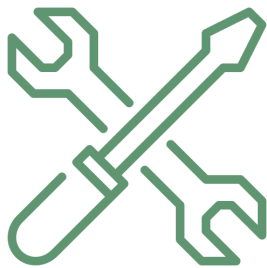




SPINSO[®]



Standard edition

ServiceDesk

manage warranties & AMC



Entering a Quotation (Trial edition)

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

1

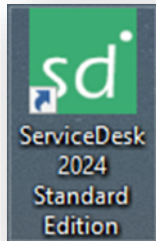
INDEX

Steps

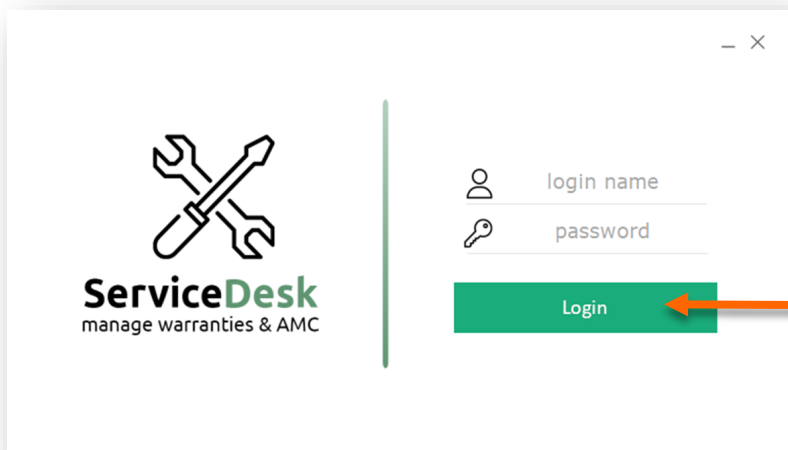
1. Index _____ Pg 2
2. Login _____ Pg 3
3. Entering a Quotation _____ Pg 4

2

LOGIN



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

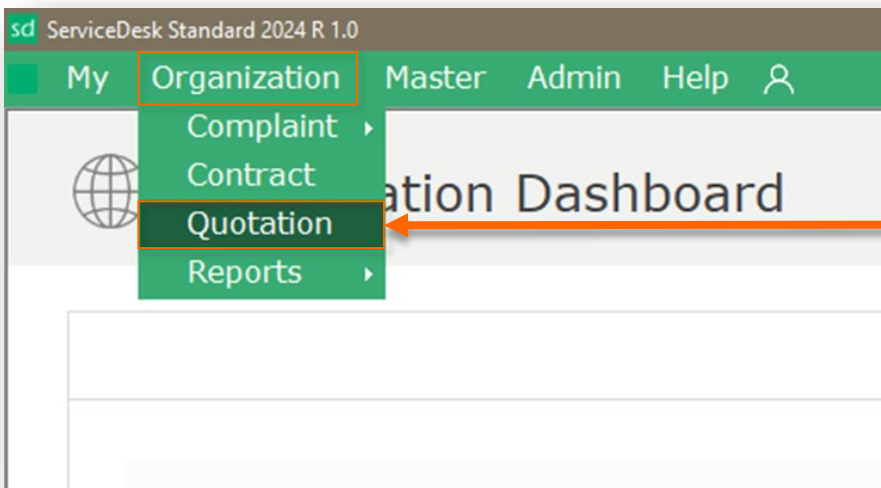


Enter Login name and password

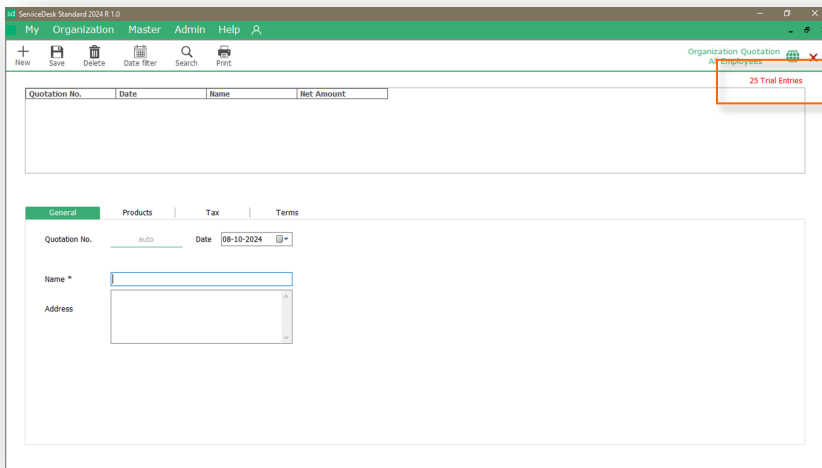
Click on **Login**

3

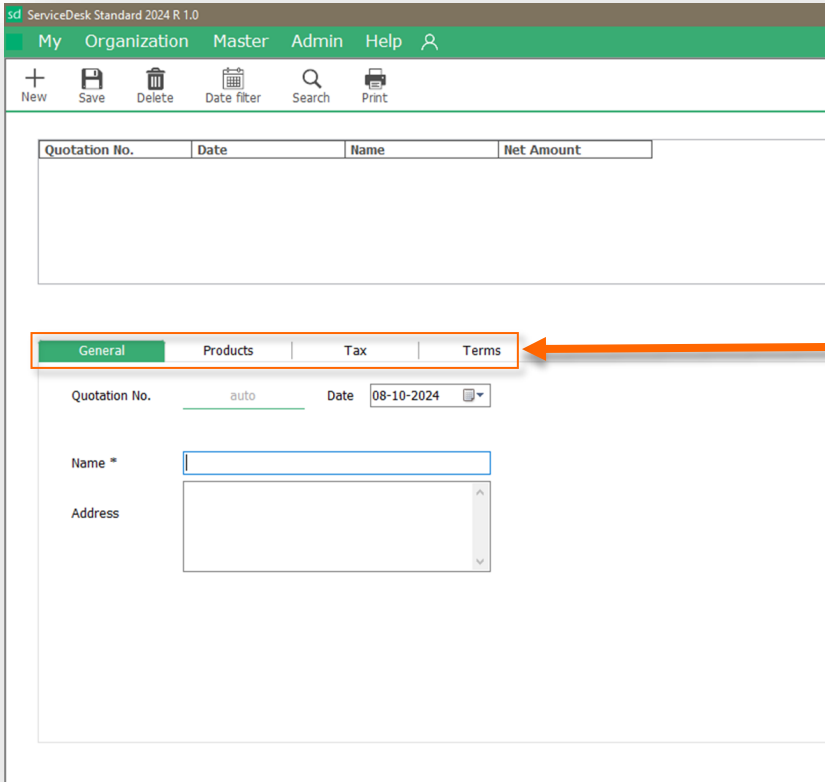
First Quotation



Go to
Organization > Quotation



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



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

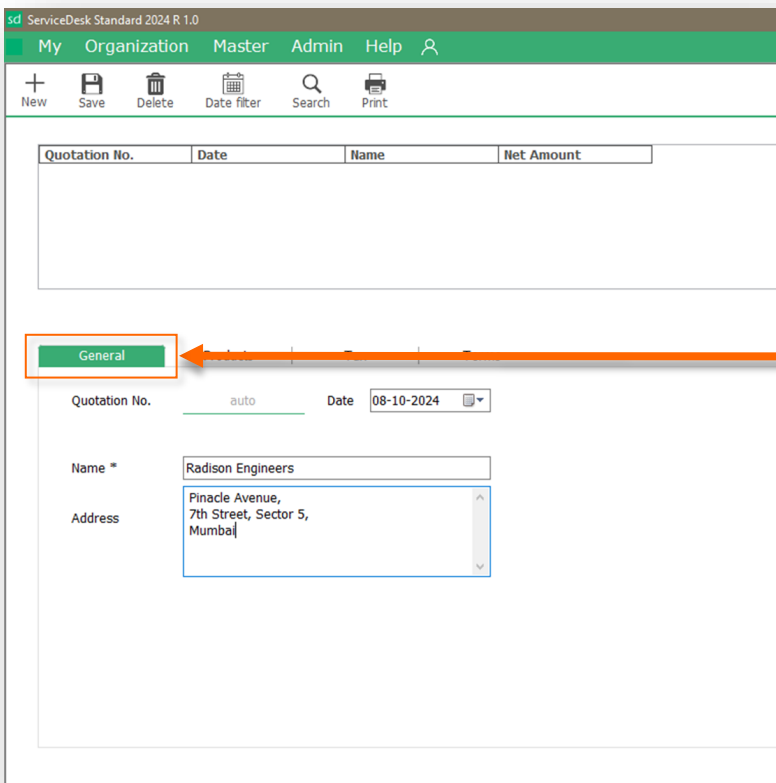
Quotation No. auto Date 08-10-2024

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

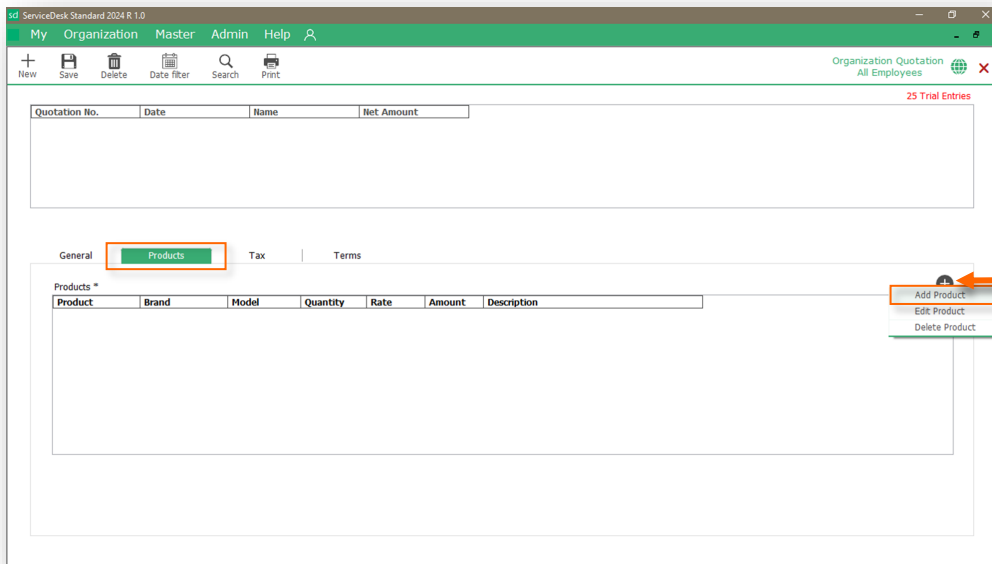
Address Pinacle Avenue,
7th Street, Sector 5,
Mumbai

General Tab:

Fill details such as

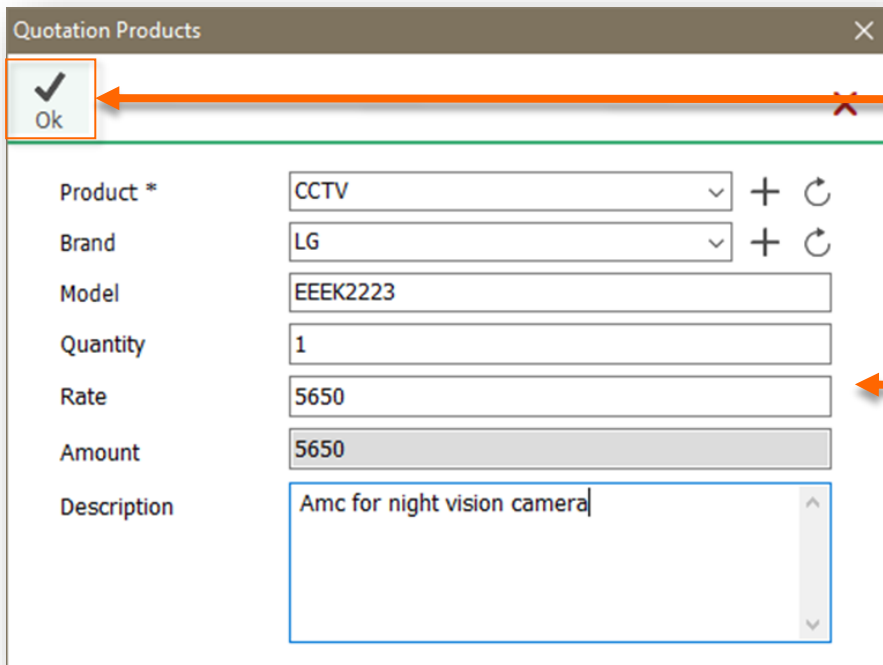
- Name
- Address
- Set Date

Quotation No. will be auto generated by the system.



Products Tab:

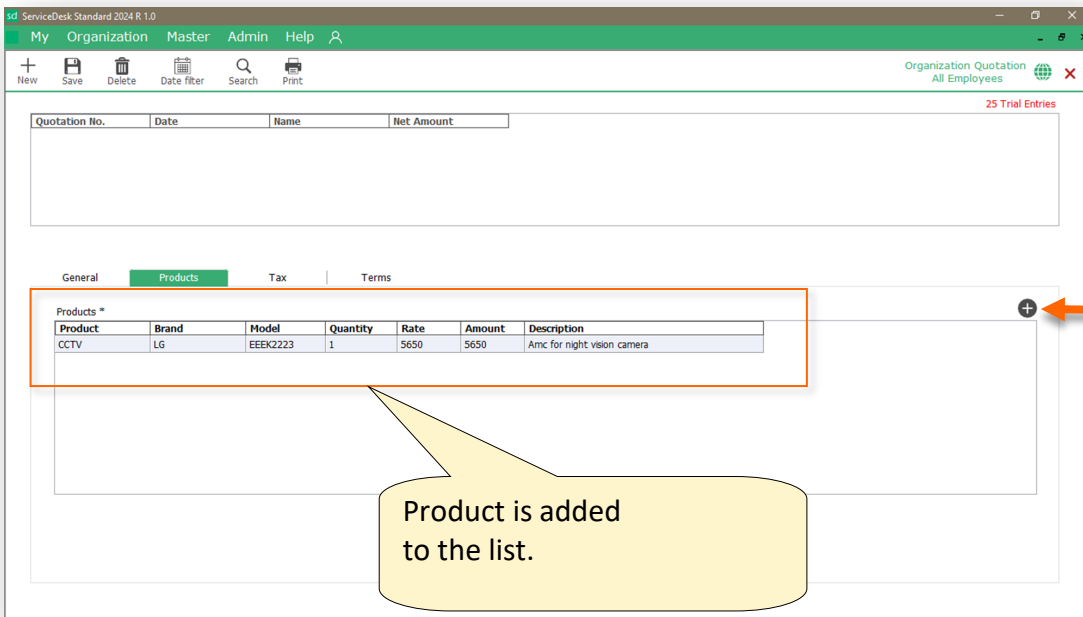
1. Click on the plus icon to add products.
2. Click on **Add Product**



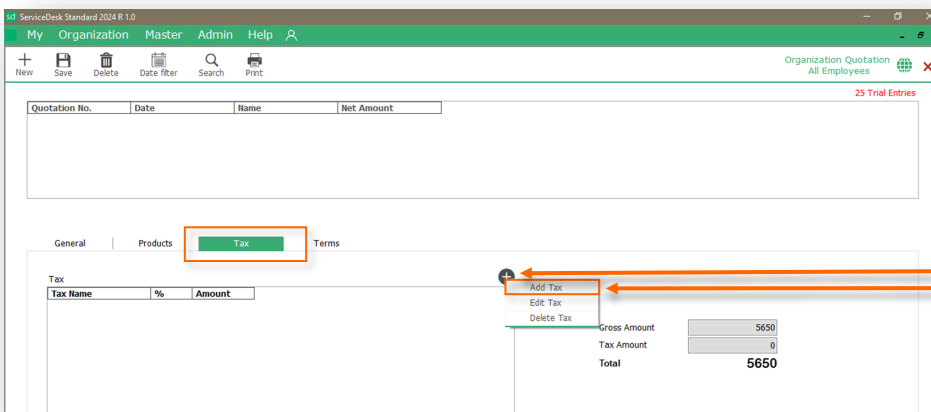
Fill products details such as:

- 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.



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.

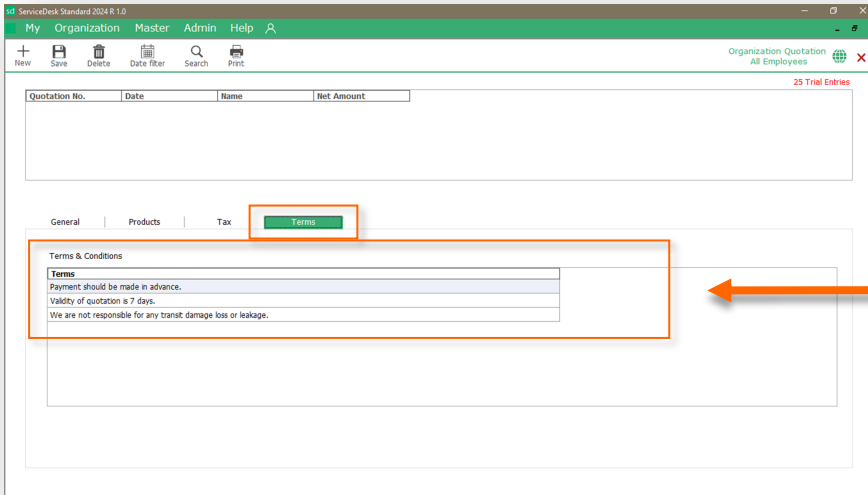
Tax Name	%	Amount
GST	18	1017

Gross Amount: 5650
Tax Amount: 1017
Total: 6667

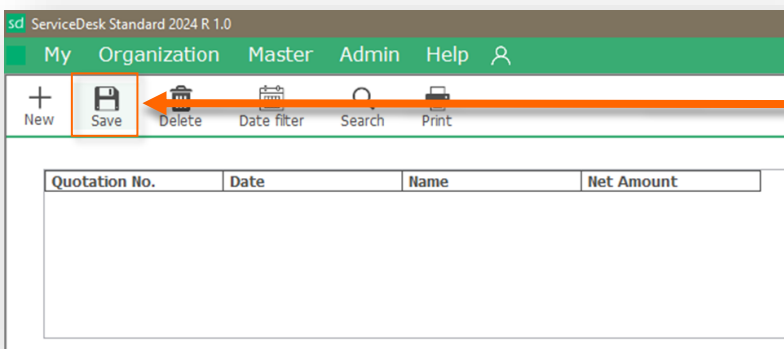
Click on the plus icon and repeat the process to add multiple Tax to the Quotation.

Tax list can be seen.

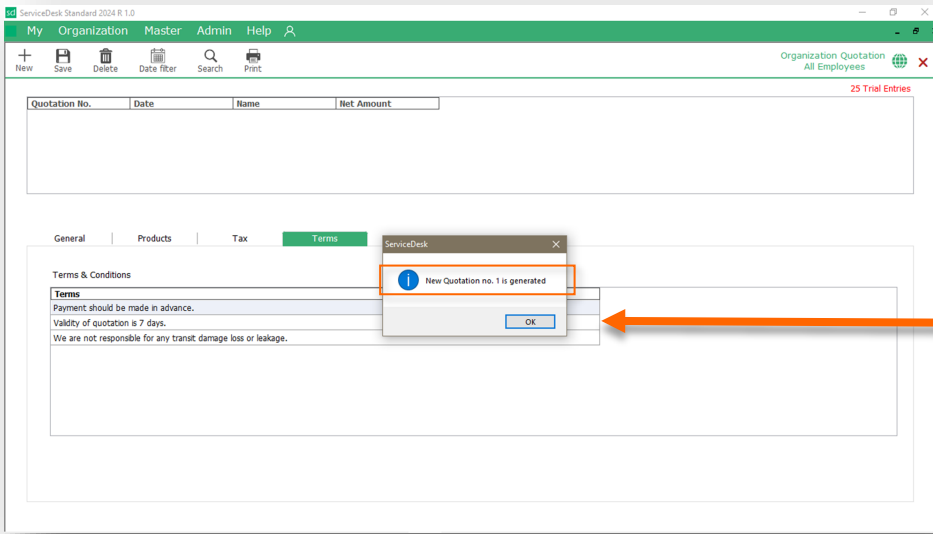
Calculating tax made easy. Gross Amount, Tax amount and Total can be seen .



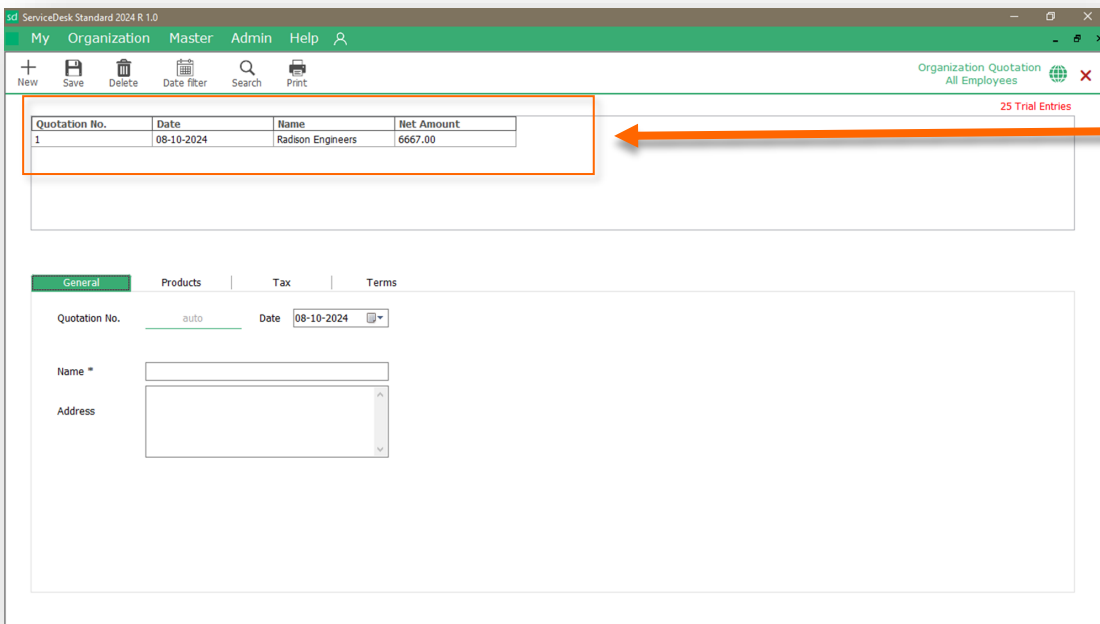
Terms:
Terms and conditions can be seen in this tab.



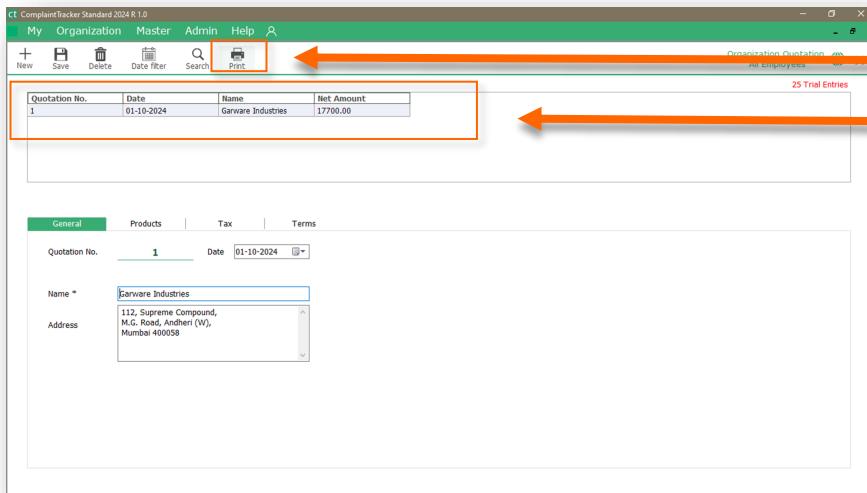
Click on **Save**.



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



All quotations can be seen in the list.



To print the quotation

1. select the quotation from the list
2. click in **Print**.



Congratulations

You have successfully entered your first Quotation in ServiceDesk 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 ServiceDesk Standard

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

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