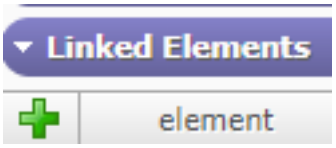
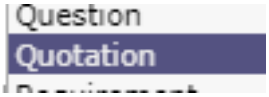
How to add a Quote to an Activity or Ticket in Project Management - ProjeQtor

Some Activities or Tickets will require Quotes for Costing to fit with the Work Budget of that Area, before the Activity can be approved.

To add a Quote to an Activity or Ticket in Project Management - ProjeQtor:

1. Search for and open the Activity that requires a quote in the program.
2. Under **Linked Elements** 

press the .
3. Select 

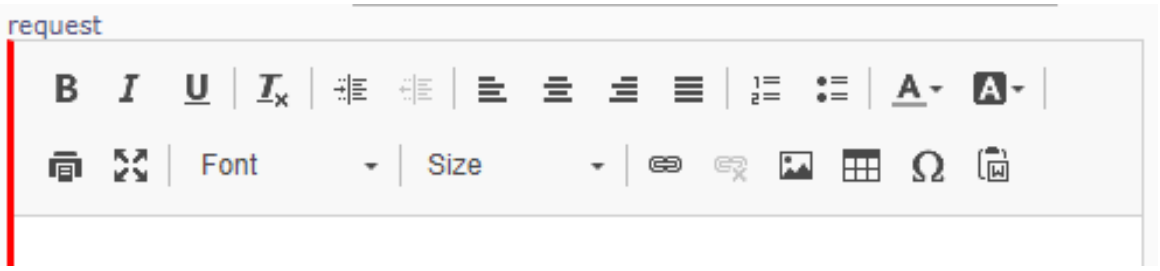
in the dropfield 

section.
4. Press the  button.
5. Press the  button.
6. Enter the name for the quote.Â This is what the quote is for.Â A short description is required.


7. Select the correct 

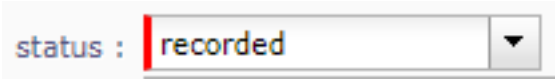
8. Make sure that **Project:** name is the correct Project the quote will be applied to.Â This by default is correctly selected but should be checked.
9. Select the correct **Customer** the quote will be charged to.
10. Select the correct person inÂ **Contact:Â** who this will be issued to.Â This is the person who handles accounts for the **Customer** you selected previously.
11. Enter a detailed description of the request for the quote, showing all items and prices.Â

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The items and prices must total the same amount as the amount in the section.

12. If there is **Additional Info**, enter this into the **Additional Info** text box area.

13. Leave the 

showing as **Recorded.**

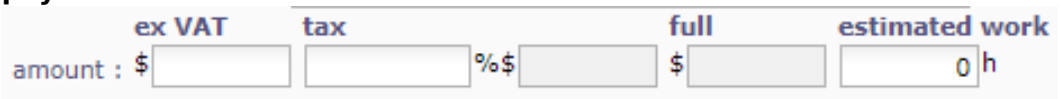
14. Select the correct person is responsible for the Quotation.

15. Select the correct **sent date:** that the quotation has been sent to the Contact / Responsible

16. Select the correct **send mode:** of how the quotation was sent.Â It is recommended that 

is selected.

17. Leave the following fields / area empty.
    - **offer validity :**
    - **likelihood :**
    - **planned end date :**
    - **activity type :**
    - **payment deadline :**



18. When finished and you are happy with the details you have added, press the 

    to **Save.**
    1. To reset the whole Quotation and start from the beginning press the 

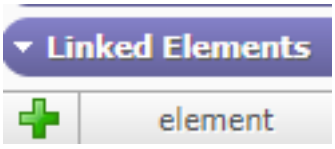
19. Press the **OK** button to save the **Quotation** and add it as a link to the Activity.

20. **Important:** You are not Finished.Â After Saving the **Quotation** you need to add the billing items.Â Proceed to the steps below.

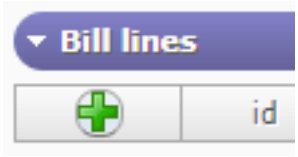
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Â

How to add Billing Items to a Quote to an Activity or Ticket in Project Management - ProjeQtor that has been created and Saved.

1. When the quote is Saved, it will show on the Activity in the 

part.Â
   Press on the Quote Number or the Quote Name to open up the Quotation.

2. Scroll down until you see 

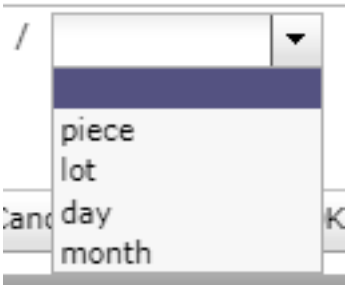
3. Press the 

4. Enter a description of the item (be specific).

5. Enter a detail of exactly what the item will be used for.

6. Enter the **price : $ in** 

7. Next to 

select the unit of the price.


Here is what each item means.
   - **piece** = use this for each individual item.
   - **lot** = use this when the price entered is for a whole package or purchase.
   - **day** = use this when charging for a day cost
   - **month** = use this when charging for a month cost.

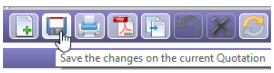
8. Enter the **quantity :**

9. The amount will be calculated automatically.

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10. Press 

11. Repeat the steps until all the **Bill Line Items are entered.**

12. When all items have been entered, **resave** the quotation by pressing the 

13. Notify your Head Office Accounts Team of the Quote and waiting for approval.

14. You are not finished.

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Attached files:

Unique solution ID: #1364
Author: n/a
Last update: 06-Dec-2017 06:11

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