

Simple Quote for Excel Readme

Overview

Create simple PDF quotes using an excel table.

Features

Enter descriptions, quantities, and prices. Include links to product pages.

Copy and paste existing quotes to new quotes.

Easily export to PDF, named by quote number etc.

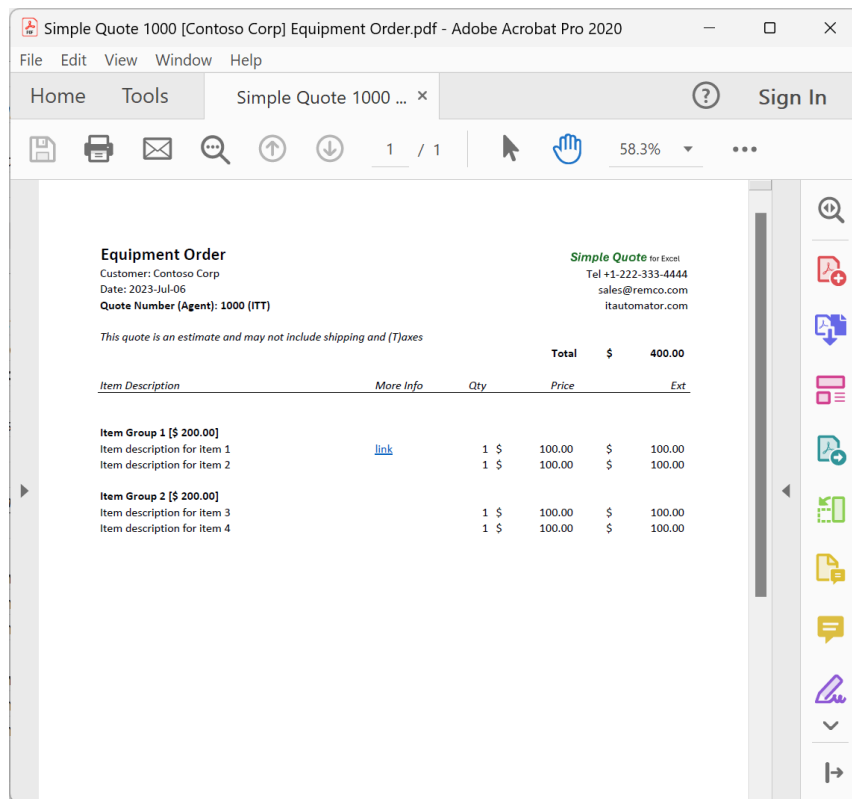
Template with a customer header, logo, etc.

Group items into ItemGroups within your quote.

Screenshots

QuoteNo	QuoteCustomer	Agent	QuoteName	QuoteDate	LineNo	ItemGroup	ItemDescription
1000	Contoso Corp	ITT	Equipment Order	2023-07-06	1	Item Group 1	Item description for item 1
1000	Contoso Corp	ITT	Equipment Order	2023-07-06	2	Item Group 1	Item description for item 2
1000	Contoso Corp	ITT	Equipment Order	2023-07-06	3	Item Group 2	Item description for item 3
1000	Contoso Corp	ITT	Equipment Order	2023-07-06	4	Item Group 2	Item description for item 4
1001	CustName	AgentNa	New Quote Name	2024-07-07	1	Item Group 1	Item description for item 1
1001	CustName	AgentNa	New Quote Name	2024-07-07	2	Item Group 1	Item description for item 2
1001	CustName	AgentNa	New Quote Name	2024-07-07	3	Item Group 2	Item description for item 3
1001	CustName	AgentNa	New Quote Name	2024-07-07	4	Item Group 2	Item description for item 4

Item Group	Item Description	More Info	Qty	Price	Ext
1	Item Group 1 [\$ 200.00]				
2	Item description for item 1	link	1	\$ 100.00	\$ 100.00
3	Item description for item 2		1	\$ 100.00	\$ 100.00
4	Item Group 2 [\$ 200.00]				
5	Item description for item 3		1	\$ 100.00	\$ 100.00
6	Item description for item 4		1	\$ 100.00	\$ 100.00



Pricing

Up to 10 quotes are free. Old quotes can be removed to continue to use free version.

Up to 100 quotes \$20

Up to 1000 quotes \$100

Unlimited quotes \$500

See www.itautomator.com to purchase or for more information.

Quick start

Press New Quote

Enter the information for your quote.

Press Quote to PDF, then Export PDF to create the pdf file.

Customizations

PDF tab

Change the highlighted portions of the template.

Change the top right area using your logo and contact information.

Change any quote disclaimers necessary.

Equipment Order		Simple Quote for Excel	
Customer: Contoso Corp		Tel +1-222-333-4444	
Date: 2023-Jul-06		sales@remco.com	
Quote Number (Agent): 1000 (ITT)		itautomator.com	
<i>This quote is an estimate and may not include shipping and (T)axes</i>			
		Total	\$ 400.00

Change information in the orange cells.

`varLicenseKey`: enter the license key you've purchased (or leave blank to use free version)

Variables	(Change orange cells only)		
varQuoteBase	1000	Base number for quotes (ENTER # HERE)	
varQuoteNext	1001	Next available quote #	
varQuoteCount	1	Number of Quotes	
varLicenseKey	S09831111	License Key (ENTER KEY HERE)	
varLicenseMax	10	Max licenses by this key (press New Quote to refresh)	
varVersion	2.5	Program version	
varFilePrefix	Simple Quote	Prefix files with (ENTER HERE)	

Quotes tab

Fill in the Orange (required) columns.

Detail columns are light orange

Non-orange columns are optional

Quote columns

QuoteNo	Enter a valid quote number (or use New Quote button)
QuoteCustomer	Customer Name
Agent	Employee Initials
QuoteName	Quote Name
QuoteDate	[enter data]
LineNo	See SortBy column for sorting rows
ItemGroup	Create ItemGroups by repeating a group name (Optional)
ItemDescription	[enter data]
MoreInfo	put URL link here (type the word link and press Ctrl-K to enter a URL)

Qty	[enter data]
UnitPrice	Per Unit Price
PriceExt	[calc]
Vendor	purchased from
UnitCost	cost per unit
CostExt	[calc]
ItemCode	Does this item need to be taxed on invoice (Enter a T or any suitable item code)?
Shipping	Does Shipping and Handling apply (Enter any amount to appear as additional line charge for invoice)
Profit	[calc]
Status	Status codes are customizable
QuoteTtl	[calc]
QuoteCost	[calc]
QuoteProfit	[calc]
SortBy	sort by this col
QuoteNote	This appears on quote header
InternalNotes	Does not show on quote

Quote Exporting to PDF

Enter the Quote number and click Quote Lookup or click PDF Quote
Click Export to PDF to save the quote (to the current folder)