

Quotes

Description

The Quotes application is used to create and manage commercial proposals sent to customers. Each quote contains line items with products or services, pricing, taxes, and conditions. This module is tightly integrated with Customers and Products, and allows for tracking the status of each quote (e.g., Draft, Sent, Accepted). When a quote is accepted, it can be converted into an invoice.

List view

SaltOS Dashboard Applications					Admin	
+ New					Search	
					PDF	
					Reset	
Customer	CIF	Quote	Date	Total		
<input type="checkbox"/> SaltOS Solutions SL	B12345678	Q2025-0100	2025-03-01	713.36		
<input type="checkbox"/> SaltOS Solutions SL	B12345678	Q2025-0099	2025-03-06	6048.39		
<input type="checkbox"/> SaltOS Solutions SL	B12345678	Q2025-0098	2025-03-07	794.72		
<input type="checkbox"/> SaltOS Solutions SL	B12345678	Q2025-0097	2025-04-13	1545.49		
<input type="checkbox"/> SaltOS Solutions SL	B12345678	Q2025-0096	2025-04-05	241.76		
<input type="checkbox"/> SaltOS Solutions SL	B12345678	Q2025-0095	2025-03-12	23356.9		
<input type="checkbox"/> SaltOS Solutions SL	B12345678	Q2025-0094	2025-02-19	3372.8		
<input type="checkbox"/> SaltOS Solutions SL	B12345678	Q2025-0093	2025-04-13	13212.8		
<input type="checkbox"/> SaltOS Solutions SL	B12345678	Q2025-0092	2025-03-11	4714.34		
<input type="checkbox"/> SaltOS Solutions SL	B12345678	Q2025-0091	2025-02-18	2550.37		
<input type="checkbox"/> SaltOS Solutions SL	B12345678	Q2025-0090	2025-03-16	23097.4		
<input type="checkbox"/> SaltOS Solutions SL	B12345678	Q2025-0089	2025-03-26	21215.8		
<input type="checkbox"/> SaltOS Solutions SL	B12345678	Q2025-0088	2025-04-08	27171.4		
<input type="checkbox"/> SaltOS Solutions SL	B12345678	Q2025-0087	2025-03-28	19128.7		
<input type="checkbox"/> SaltOS Solutions SL	B12345678	Q2025-0086	2025-04-16	8918.35		
<input type="checkbox"/> SaltOS Solutions SL	B12345678	Q2025-0085	2025-03-03	10145.4		
<input type="checkbox"/> SaltOS Solutions SL	B12345678	Q2025-0084	2025-02-18	3606.7		
<input type="checkbox"/> SaltOS Solutions SL	B12345678	Q2025-0083	2025-03-18	5062.41		
<input type="checkbox"/> SaltOS Solutions SL	B12345678	Q2025-0082	2025-03-18	321.41		
<input type="checkbox"/> SaltOS Solutions SL	B12345678	Q2025-0081	2025-03-18	26614.7		
<input type="checkbox"/> SaltOS Solutions SL	B12345678	Q2025-0080	2025-03-14	5335.02		
<input type="checkbox"/> SaltOS Solutions SL	B12345678	Q2025-0079	2025-03-08	15277.3		

The following fields are displayed in the list view:

- Customer: The client to whom the quote is addressed.
- CIF: The customer's tax identification code (e.g., VAT, CIF, NIF).
- Quote: The internal reference or code used to identify the quote.
- Date: The official date the quote was created or issued.
- Total: The total monetary value of the quote, including all taxes and discounts.

Form view

This view is used for creating, editing or viewing a quote.

In **create** mode, the form is empty and allows you to build a new quote.

SaltOS

DashboardApplications

Admin

+ New

Search

SearchPDFReset

CustomerCIFQuoteDateTotal

SaltOS Solutions SL

B12345678

Q2025-0100

2025-03-01

713.36

SaltOS Solutions SL

B12345678

Q2025-0099

2025-03-06

6048.39

SaltOS Solutions SL

B12345678

Q2025-0098

2025-03-07

794.72

SaltOS Solutions SL

B12345678

Q2025-0097

2025-04-13

1545.49

SaltOS Solutions SL

B12345678

Q2025-0096

2025-04-05

241.76

SaltOS Solutions SL

B12345678

Q2025-0095

2025-03-12

23356.9

SaltOS Solutions SL

B12345678

Q2025-0094

2025-02-19

3372.8

SaltOS Solutions SL

B12345678

Q2025-0093

2025-04-13

13212.8

SaltOS Solutions SL

B12345678

Q2025-0092

2025-03-11

4714.34

SaltOS Solutions SL

B12345678

Q2025-0091

2025-02-18

2556.37

SaltOS Solutions SL

B12345678

Q2025-0090

2025-03-16

23097.4

SaltOS Solutions SL

B12345678

Q2025-0089

2025-03-26

21215.8

SaltOS Solutions SL

B12345678

Q2025-0088

2025-04-08

27171.4

SaltOS Solutions SL

B12345678

Q2025-0087

2025-03-28

19128.7

SaltOS Solutions SL

B12345678

Q2025-0086

2025-04-16

8918.35

SaltOS Solutions SL

B12345678

Q2025-0085

2025-03-03

10145.4

SaltOS Solutions SL

B12345678

Q2025-0084

2025-02-18

3606.7

SaltOS Solutions SL

B12345678

Q2025-0083

2025-03-18

5062.41

SaltOS Solutions SL

B12345678

Q2025-0082

2025-03-18

321.41

SaltOS Solutions SL

B12345678

Q2025-0081

2025-03-18

26614.7

SaltOS Solutions SL

B12345678

Q2025-0080

2025-03-14

5335.02

SaltOS Solutions SL

B12345678

Q2025-0079

2025-03-08

15277.3

Quote

Date

mm/dd/yyyy

Customer

CIF

Address

City

Province / State

Zip

Country

Notes

Concepts

Description	Quantity	Price	Discount	Tax	Total

Taxes

Totals

Tax	Base	Total

Subtotal	Tax	Total

Payment method

Valid until

Status

mm/dd/yyyy

New files

Choose Files

No file chosen

New note

In **view** mode, it displays a finalized quote without editing capabilities.

SaltOS

DashboardApplications

Admin

+ New

Search

SearchPDFReset

CustomerCIFQuoteDateTotal

SaltOS Solutions SL

B12345678

Q2025-0100

2025-03-01

713.36

SaltOS Solutions SL

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B12345678

Q2025-0098

2025-03-07

794.72

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Q2025-0086

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B12345678

Q2025-0085

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B12345678

Q2025-0080

2025-03-14

5335.02

SaltOS Solutions SL

B12345678

Q2025-0079

2025-03-08

15277.3

Quote

Date

Q2025-0100

03/01/2025

Customer

CIF

SaltOS Solutions SL

B12345678

Address

City

Province / State

Calle Ficticia 123, 3ªA

Barcelona

Barcelona

Zip

Country

08001

Spain

Notes

Leader treat contain notice hour watch. Those citizen think Mrs project. Recently reveal describe management. Building hard sense mean single improve close.

Concepts

Description	Quantity	Price	Discount	Tax	Total
architect revolutionary bandwidth	5.66	104.16	0	21	589.55

Taxes

Totals

Tax	Base	Total
IVA 21%	589.55	123.81

Subtotal	Tax	Total
589.55	123.81	713.36

Payment method

Valid until

Status

Gift Card

04/15/2025

Draft

InfoPDF

EditDeleteClose

In **edit** mode, it shows a draft quote ready for modification.

2

Dashboard Applications

Admin

+ New

Search

Search

PDF

Reset

Customer	CIF	Quote	Date	Total
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<input type="checkbox"/> SaltOS Solutions SL	B12345678	Q2025-0079	2025-03-08	15277.3

Quote

Date

Q2025-0100

03/01/2025

Customer

CIF

SaltOS Solutions SL

B12345678

Address

City

Province / State

Calle Ficticia 123, 3ªA

Barcelona

Barcelona

Zip

Country

08001

Spain

Notes

Leader treat contain notice hour watch. Those citizen think Mrs project. Recently reveal describe management. Building hard sense mean single improve close.

Concepts

Description	Quantity	Price	Discount	Tax	Total
architect revolutionary bandwidth	5.66	104.16	0	21	589.55

Taxes

Tax	Base	Total
IVA 21%	589.55	123.81

Totals

Subtotal	Tax	Total
589.55	123.81	713.36

Payment method

Valid until

Status

Gift Card

04/15/2025

Draft

New files

Choose Files

No file chosen

New note

Save

Cancel

The form includes the following fields:

- **Quote:** The internal reference or code used to identify the quote.
- **Date:** The official date the quote was created or issued.
- **Customer:** The client to whom the quote is addressed.
- **CIF:** The customer's tax identification code (e.g., VAT, CIF, NIF).
- **Address:** The customer's address at the time of issuing the quote.
- **City:** The city associated with the customer in the quote.
- **Province / State:** The region or state linked to the customer's location.
- **Zip:** The postal code of the customer's address.
- **Country:** The customer's country of residence or business.
- **Notes:** Additional internal notes or observations attached to the quote.
- **Concepts:** The list of products or services included in the quote.
- **Taxes:** Breakdown of applicable taxes for the quoted items.
- **Totals:** Subtotal, taxes, and final amount displayed in a structured summary.
- **Payment method:** The selected method for payment if the quote is accepted.
- **Valid until:** The expiration date until which the quote remains valid.
- **Status:** The current lifecycle state of the quote (e.g., draft, sent, accepted).

Quote lines are also included as a subtable, where each line contains product, quantity, price, tax, and discount.

Delete

Quotes can be deleted from the list view if they are not yet accepted. A confirmation prompt will appear before deletion.

This action is irreversible and subject to user permissions.