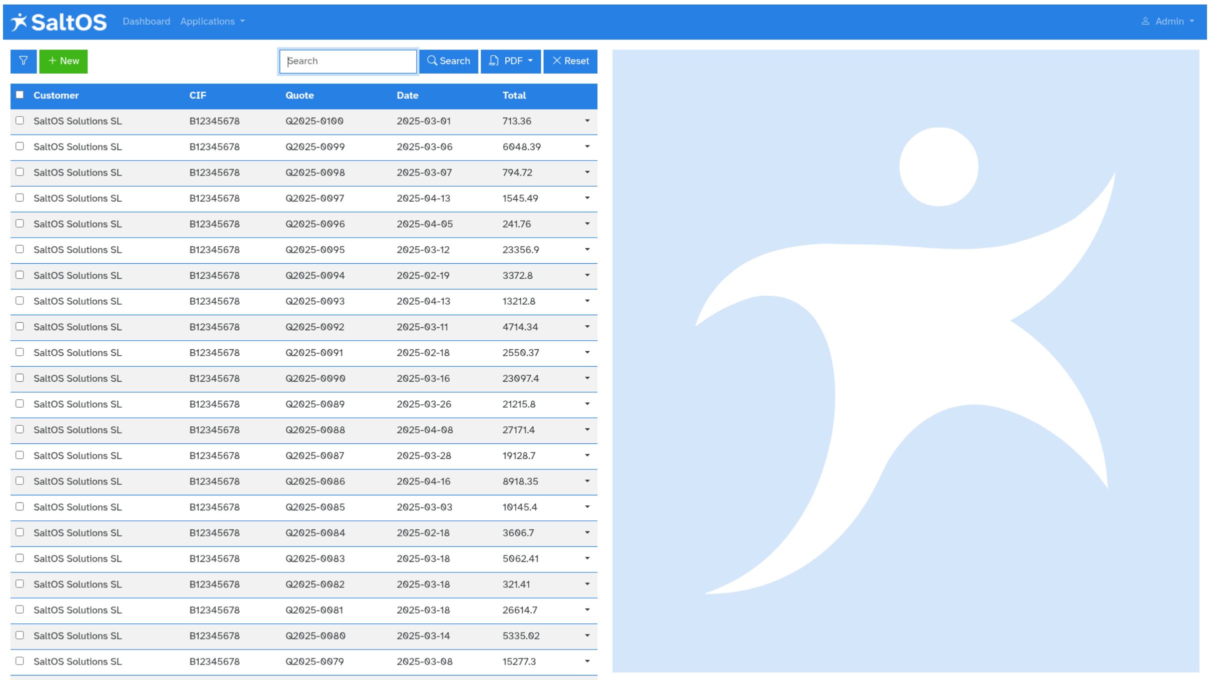
Quotes

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



Customer	CIF	Quote	Date	Total
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	2550.37
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

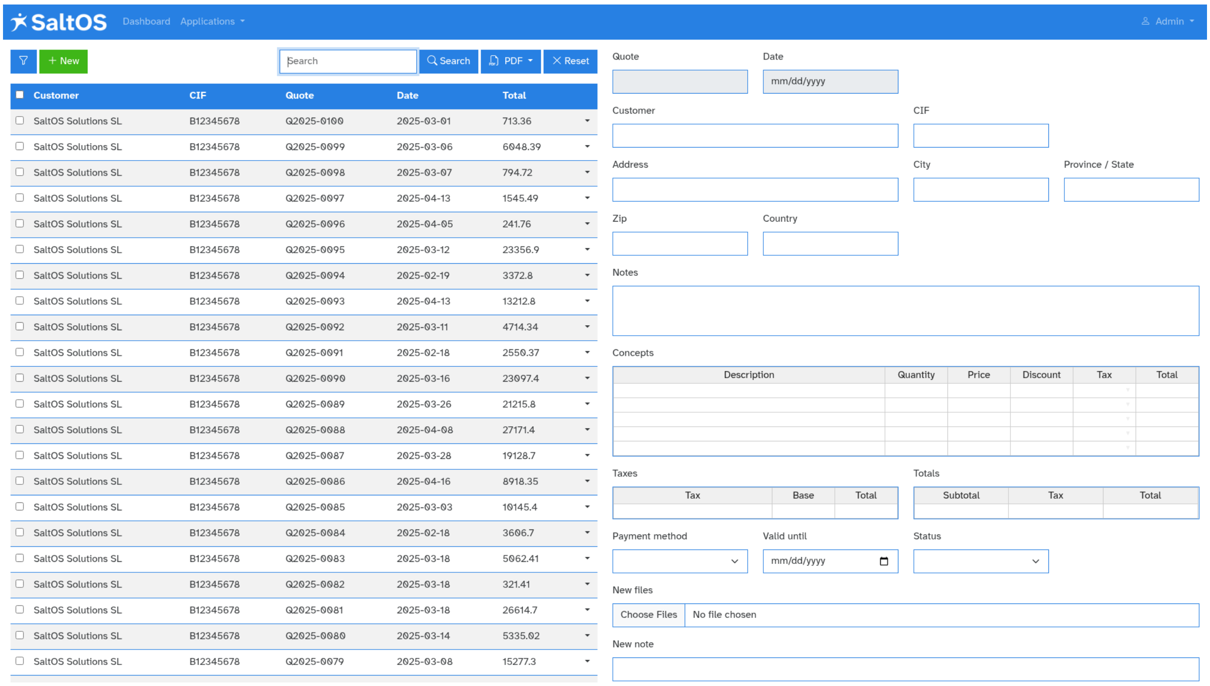
The following fields are displayed in the list view:

- Customer: Name of the customer to whom the quote is addressed.
- CIF: Tax identification code of the customer.
- Quote: Internal reference code of the quote.
- Date: Date the quote was issued.
- Total: Total amount of the quote including taxes.

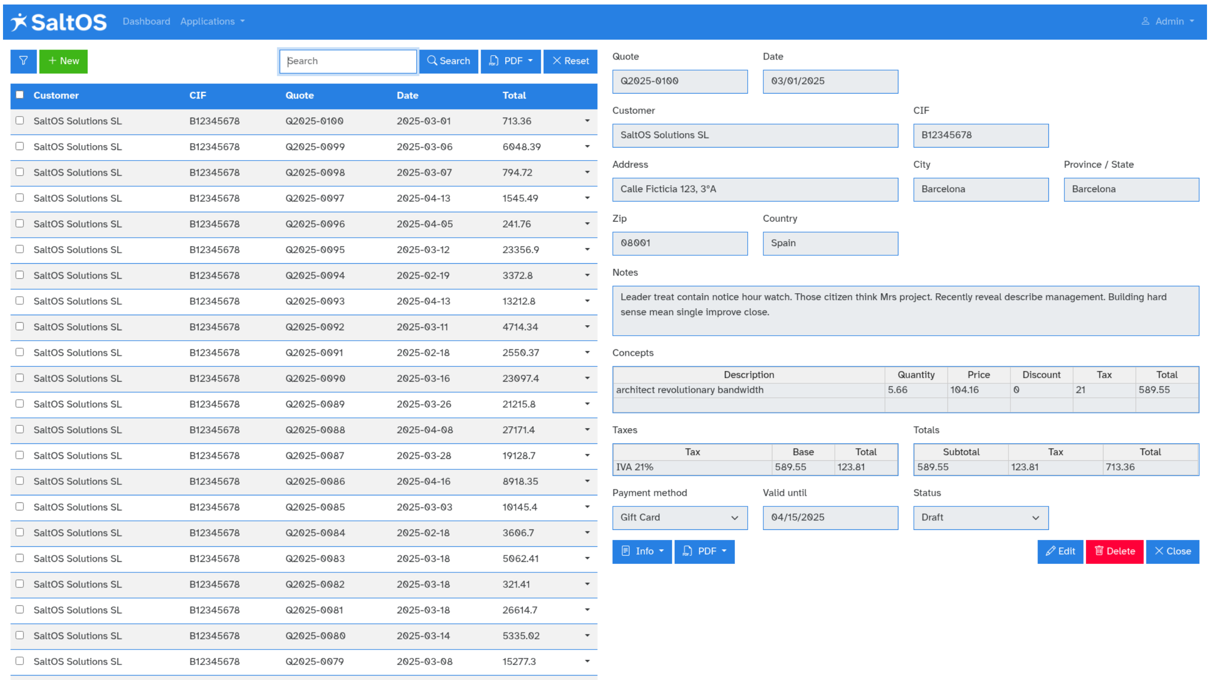
Form view

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

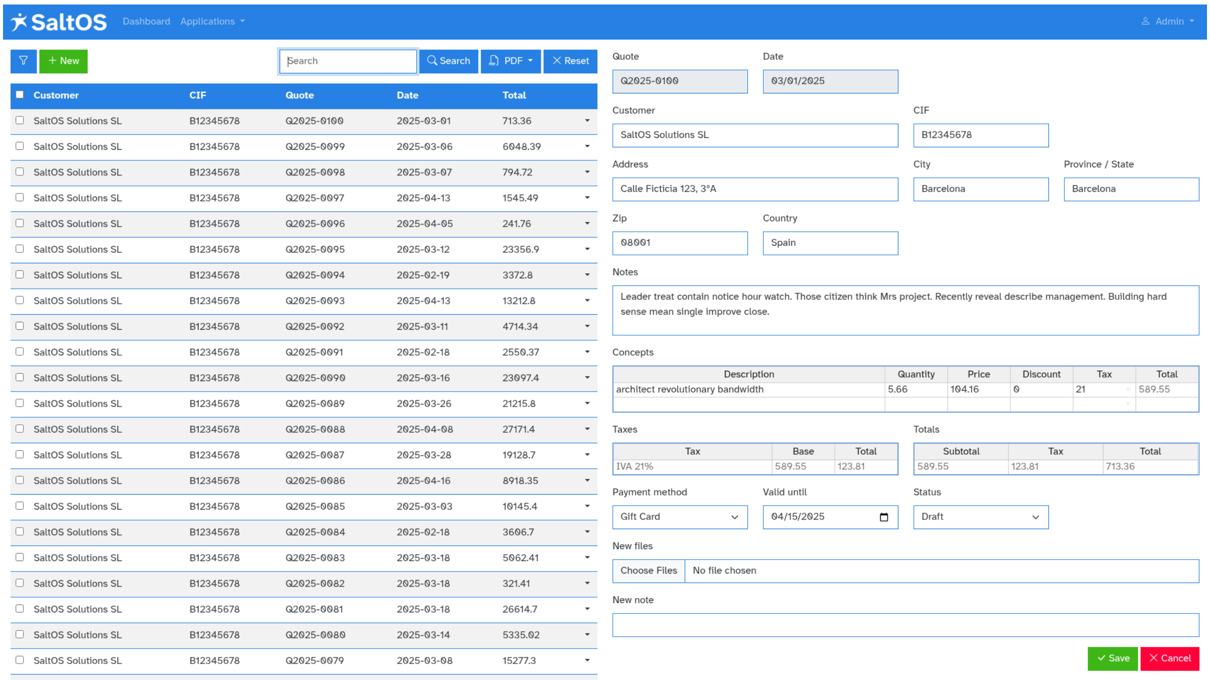
In **create** mode, the form is empty and allows you to build a new quote.



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



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



The form includes the following fields:

- Customer: Selected client to whom the quote is addressed.
- CIF: Tax identification number of the customer.
- Quote: Internal reference number for the quote.
- Date: Emission date of the quote.
- Status: Current state of the quote (Draft, Sent, Accepted).
- Valid Until: Expiration date for the offer.
- Payment Terms: Conditions agreed for future payment if accepted.
- Delivery Date: Expected delivery date for the goods or services.
- Notes: Internal comments or specific conditions related to this quote.
- Total: Automatically calculated amount based on lines and taxes.

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.