

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					List - Quotes	Admin
New					Search	PDF
					Search	PDF
Customer	CIF	Quote	Date	Total		
<input type="checkbox"/> Cohen, Hill and Smith	P82569546	Q2025-0100	2025-03-05	713.36		
<input type="checkbox"/> Johnson, Floyd and Weeks	D87626925	Q2025-0699	2025-03-10	6048.39		
<input type="checkbox"/> Bruce, Lee and Munoz	C15192137	Q2025-0698	2025-03-11	794.72		
<input type="checkbox"/> Santos, Clark and Jacobson	W63402535	Q2025-0697	2025-04-17	1545.49		
<input type="checkbox"/> Patel Ltd	B37081168	Q2025-0696	2025-04-09	241.76		
<input type="checkbox"/> Hobbs-Harvey	R89729959	Q2025-0695	2025-03-16	23356.9		
<input type="checkbox"/> Patel-Stewart	V15470612	Q2025-0694	2025-02-23	3372.8		
<input type="checkbox"/> Alvarez, Valenzuela and Chambers	R84858103	Q2025-0693	2025-04-17	13212.8		
<input type="checkbox"/> Casey PLC	W21673781	Q2025-0692	2025-03-15	4714.34		
<input type="checkbox"/> Stewart, Scott and Wilson	N94728752	Q2025-0691	2025-02-22	2550.37		
<input type="checkbox"/> Dawson Group	E12327993	Q2025-0690	2025-03-20	23097.4		
<input type="checkbox"/> Hoffman Group	U92709751	Q2025-0689	2025-03-30	21215.8		
<input type="checkbox"/> Miller Ltd	H59899283	Q2025-0688	2025-04-12	27171.4		
<input type="checkbox"/> Booker-Douglas	J96464607	Q2025-0687	2025-04-01	19128.7		
<input type="checkbox"/> Wood, Donaldson and Hansen	B75663474	Q2025-0686	2025-04-20	8918.35		
<input type="checkbox"/> Booker, Rivas and Hines	Q43401155	Q2025-0685	2025-03-07	10145.4		
<input type="checkbox"/> Johnson, Stevenson and Lindsey	S45949218	Q2025-0684	2025-02-22	3606.7		
<input type="checkbox"/> Henderson-Bullock	G43558532	Q2025-0683	2025-03-22	5062.41		
<input type="checkbox"/> Hayden, Harmon and McDonald	A91244486	Q2025-0682	2025-03-22	321.41		
<input type="checkbox"/> Dunlap, Johnson and Rojas	E72564747	Q2025-0681	2025-03-22	26614.7		
<input type="checkbox"/> Perez, Rodriguez and Rollins	E89508055	Q2025-0680	2025-03-18	5335.02		
<input type="checkbox"/> Serrano-Cohen	V87638734	Q2025-0679	2025-03-12	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

New - Quotes

Admin

+ New

Search

Search

PDF

Reset

Customer

CIF

Quote

Date

Total

Cohen, Hill and Smith

P82569546

Q2025-0100

2025-03-05

713.36

Johnson, Floyd and Weeks

D87626925

Q2025-0099

2025-03-10

6048.39

Bruce, Lee and Munoz

C15192137

Q2025-0098

2025-03-11

794.72

Santos, Clark and Jacobson

W63402535

Q2025-0097

2025-04-17

1545.49

Patel Ltd

B37081168

Q2025-0096

2025-04-09

241.76

Hobbs-Harvey

R89729959

Q2025-0095

2025-03-16

23356.9

Patel-Stewart

V15470612

Q2025-0094

2025-02-23

3372.8

Alvarez, Valenzuela and Chambers

R84858103

Q2025-0093

2025-04-17

13212.8

Casey PLC

W21673781

Q2025-0092

2025-03-15

4714.34

Stewart, Scott and Wilson

N94728752

Q2025-0091

2025-02-22

2550.37

Dawson Group

E12327993

Q2025-0090

2025-03-20

23097.4

Hoffman Group

U92709751

Q2025-0089

2025-03-30

21215.8

Miller Ltd

H59899283

Q2025-0088

2025-04-12

27171.4

Booker-Douglas

J96464607

Q2025-0087

2025-04-01

19128.7

Wood, Donaldson and Hansen

B75663474

Q2025-0086

2025-04-20

8918.35

Booker, Rivas and Hines

Q43401155

Q2025-0085

2025-03-07

10145.4

Johnson, Stevenson and Lindsey

S45949218

Q2025-0084

2025-02-22

3606.7

Henderson-Bullock

G43558532

Q2025-0083

2025-03-22

5062.41

Hayden, Harmon and McDonald

A91244486

Q2025-0082

2025-03-22

321.41

Dunlap, Johnson and Rojas

E72564747

Q2025-0081

2025-03-22

26614.7

Perez, Rodríguez and Rollins

E89508055

Q2025-0080

2025-03-18

5335.02

Serrano-Cohen

V87638734

Q2025-0079

2025-03-12

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

Payment method

Valid until

Status

New files

Choose Files

No file chosen

New note

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

SaltOS

DashboardApplications

Detail - Quotes

Admin

+ New

Search

Search

PDF

Reset

Customer

CIF

Quote

Date

Total

Cohen, Hill and Smith

P82569546

Q2025-0100

2025-03-05

713.36

Johnson, Floyd and Weeks

D87626925

Q2025-0099

2025-03-10

6048.39

Bruce, Lee and Munoz

C15192137

Q2025-0098

2025-03-11

794.72

Santos, Clark and Jacobson

W63402535

Q2025-0097

2025-04-17

1545.49

Patel Ltd

B37081168

Q2025-0096

2025-04-09

241.76

Hobbs-Harvey

R89729959

Q2025-0095

2025-03-16

23356.9

Patel-Stewart

V15470612

Q2025-0094

2025-02-23

3372.8

Alvarez, Valenzuela and Chambers

R84858103

Q2025-0093

2025-04-17

13212.8

Casey PLC

W21673781

Q2025-0092

2025-03-15

4714.34

Stewart, Scott and Wilson

N94728752

Q2025-0091

2025-02-22

2550.37

Dawson Group

E12327993

Q2025-0090

2025-03-20

23097.4

Hoffman Group

U92709751

Q2025-0089

2025-03-30

21215.8

Miller Ltd

H59899283

Q2025-0088

2025-04-12

27171.4

Booker-Douglas

J96464607

Q2025-0087

2025-04-01

19128.7

Wood, Donaldson and Hansen

B75663474

Q2025-0086

2025-04-20

8918.35

Booker, Rivas and Hines

Q43401155

Q2025-0085

2025-03-07

10145.4

Johnson, Stevenson and Lindsey

S45949218

Q2025-0084

2025-02-22

3606.7

Henderson-Bullock

G43558532

Q2025-0083

2025-03-22

5062.41

Hayden, Harmon and McDonald

A91244486

Q2025-0082

2025-03-22

321.41

Dunlap, Johnson and Rojas

E72564747

Q2025-0081

2025-03-22

26614.7

Perez, Rodríguez and Rollins

E89508055

Q2025-0080

2025-03-18

5335.02

Serrano-Cohen

V87638734

Q2025-0079

2025-03-12

15277.3

Quote

Date

Q2025-0100

03/05/2025

Customer

CIF

Address

City

Province / State

Zip

Country

Notes

Concepts

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

Taxes

Totals

Payment method

Valid until

Status

Info

PDF

Edit

Delete

Close

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

2

SaltOS

Dashboard Applications

Modify - Quotes

Admin

+ New

Search

Search

PDF

Reset

Quote

G2025-0100

Date

03/05/2025

Customer

CIF

Customer

CIF

Cohen, Hill and Smith

P82569546

Address

City

Province / State

9385 Stevens Ports, Lake Christophermouth, MI 92292

Peterburgh

Nebraska

Zip

Country

33155

Christmas Island

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

04/19/2025

Draft

New files

Choose Files

No file chosen

New note

Customer	CIF	Quote	Date	Total
<input type="checkbox"/> Cohen, Hill and Smith	P82569546	G2025-0100	2025-03-05	713.36
<input type="checkbox"/> Johnson, Floyd and Weeks	D87626925	G2025-0099	2025-03-10	6048.39
<input type="checkbox"/> Bruce, Lee and Munoz	C15192137	G2025-0098	2025-03-11	794.72
<input type="checkbox"/> Santos, Clark and Jacobson	W63402535	G2025-0097	2025-04-17	1545.49
<input type="checkbox"/> Patel Ltd	B37081168	G2025-0096	2025-04-09	241.76
<input type="checkbox"/> Hobbs-Harvey	R89729959	G2025-0095	2025-03-16	23356.9
<input type="checkbox"/> Patel-Stewart	V15470612	G2025-0094	2025-02-23	3372.8
<input type="checkbox"/> Alvarez, Valenzuela and Chambers	R84858193	G2025-0093	2025-04-17	13212.8
<input type="checkbox"/> Casey PLC	W21673781	G2025-0092	2025-03-15	4714.34
<input type="checkbox"/> Stewart, Scott and Wilson	N94728752	G2025-0091	2025-02-22	2550.37
<input type="checkbox"/> Dawson Group	E12327993	G2025-0090	2025-03-20	23097.4
<input type="checkbox"/> Hoffman Group	U92709751	G2025-0089	2025-03-30	21215.8
<input type="checkbox"/> Miller Ltd	H59899283	G2025-0088	2025-04-12	27171.4
<input type="checkbox"/> Booker-Douglas	J96464007	G2025-0087	2025-04-01	19128.7
<input type="checkbox"/> Wood, Donaldson and Hansen	B75663474	G2025-0086	2025-04-20	8918.35
<input type="checkbox"/> Booker, Rivas and Hines	Q43401155	G2025-0085	2025-03-07	10145.4
<input type="checkbox"/> Johnson, Stevenson and Lindsey	S45949218	G2025-0084	2025-02-22	3696.7
<input type="checkbox"/> Henderson-Bullock	G43558532	G2025-0083	2025-03-22	5062.41
<input type="checkbox"/> Hayden, Harmon and McDonald	A91244486	G2025-0082	2025-03-22	321.41
<input type="checkbox"/> Dunlap, Johnson and Rojas	ET2564747	G2025-0081	2025-03-22	26614.7
<input type="checkbox"/> Perez, Rodriguez and Rollins	E89508055	G2025-0080	2025-03-18	5335.02
<input type="checkbox"/> Serrano-Cohen	V87638734	G2025-0079	2025-03-12	15277.3

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.

PDF generation

The screenshot displays the 'Modify Quotes' interface in the SaltOS application. The interface is divided into several sections:

- Customer details:** Cohen, Hill and Smith, C.I.F.: P82569546, 9385 Stevens Ports, Lake Christophermouth, MI 92292, Peterburgh, Nebraska, 33155, Christmas Island.
- Company details:** SaltOS Solutions SL, C.I.F.: 812345678, Calle Ficticia 123, 3ª, Barcelona, Barcelona, 08001, Spain.
- Quote information:** Quote Code: Q2025-0100, Date: 2025-03-05, Payment method: Gift Card.
- Table of items:**

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

Below the table, there are summary rows for Price, Discount, Tax, and Total, showing values of 0, 21, and 589.55 respectively.

From the individual view of a record (view), the user can generate and download a PDF containing all relevant data of that entry.

From the list view (list), it is possible to select multiple records using the checkboxes and generate a single PDF that includes all of them.