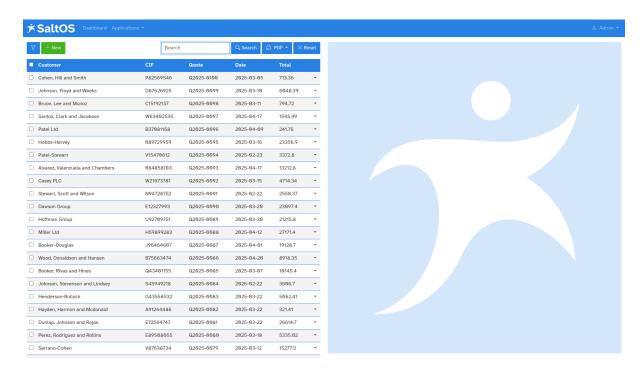# Quotes

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.
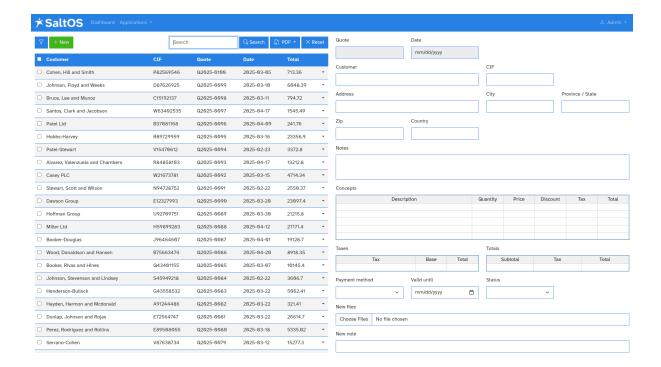
List view

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.

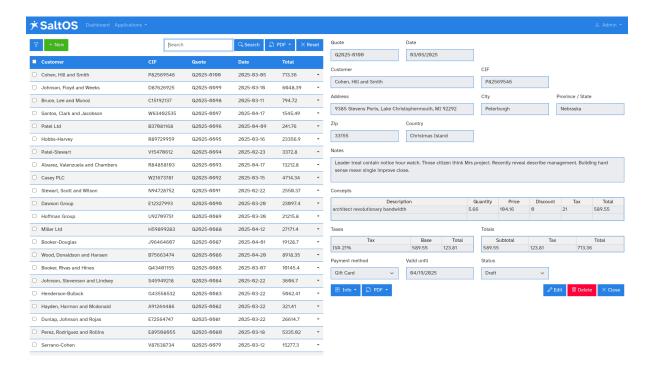- Total: The total monetary value of the quote, including all taxes and discounts.

Form view

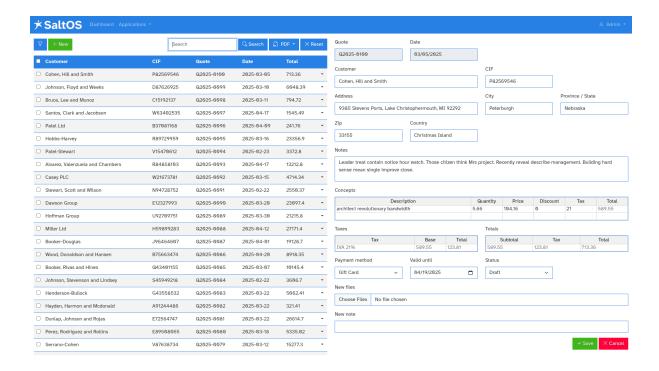This view is used for creating, editing or viewing a quote.

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

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:

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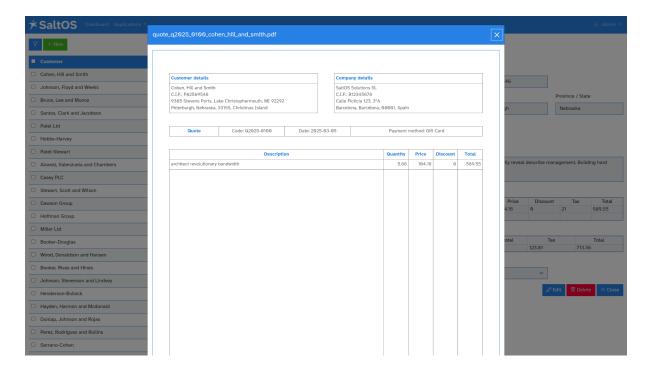
Quote lines are also included as a subtable, where each line contains product, quantity, price, tax, and discount.

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

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.