CMS QuoteIn - Create Quote Input Instruction (2023 version)

Total possible input field = #78

Instruction: please type the quote carefully, the bill to + ship to address can retrieve from client list, At least one product's details must be input to the quote otherwise it will generate an error. Up to ten products we can add to each quote at this time. Don't forget to input VAT/ Shipping if it exists. $78 is the final amount.

Bill To
1. Bill_to Name
2. Address_1
3. Address_2
4. City
5. Post Code

Ship To
6. Ship_to Name
7. Address_1
8. Address_2
9. City
10. Postcode

Session
11. Invoice No
12. Invoice Date
13. Reference No
14. PO   = EMPTY

Products
15.　Description of goods
16.　Code
17.　Qty
18.　Unit
19.　Discount
20.　Total
Optional Products
21.　Description of goods
22.　Code
23.　Qty

24.　Unit
25.　Discount
26.　Total

27.　Description of goods
28.　Code
29.　Qty
30.　Unit
31.　Discount
32.　Total

33.　Description of goods
34.　Code
35.　Qty
36.　Unit
37.　Discount
38.　Total

39.　Description of goods
40.　Code
41.　Qty
42.　Unit
43.　Discount
44.　Total

45.　Description of goods
46.　Code
47.　Qty
48.　Unit
49.　Discount
50.　Total

51.　Description of goods
52.　Code

53.　Qty
54.　Unit
55.　Discount
56.　Total

57.　Description of goods
58.　Code
59.　Qty
60.　Unit
61.　Discount
62.　Total

63.　Description of goods
64.　Code
65.　Qty
66.　Unit
67.　Discount
68.　Total

69.　Description of goods
70.　Code
71.　Qty
72.　Unit
73.　Discount
74.　Total

Final Calculation
75 Subtotal
76 vat
77 shipping, handling
$78 TOTAL

　　　　　　　= Automatic Calculate

　　　　　　　= Generate From Client List, Go To Dashboard > Add Edit Client

　　　　　　　= PO Number must be empty for the quote, we can add it later on Final Invoice instead