

Quote Job

If you are quoting the job (e.g. once completing the survey) prior to starting the job then the would create the quote from within the job record.

- 1. Financial Tab
- 2. Create Quote

Create Jobs

View Jobs

Import

Job Report (BW)

Timeline Diary

Grid Diary

Export Payroll Data

Vehicle Tracker

Export P&L Report

Job Meeting & Invoice report

Employee Day View

JOBS STATUS

COLOUR

Pending

Survey Booked

Survey Completed

Quote Sent for Authorisation

Quote Accepted

Job Raised (Booked)

Job In-Progress

Job Completed

DEMO QUOTE JOB

BASIC

Location/Timing

Worksheets

Attachments

Appointments

Financials

POs

P & L

T/S

Expenses

ACTIONS

#	Num	Title	Account	Status	Subtotal	Grand Total	Valid Until	User	Action
#	Num	Title	Account	Status	Subtotal	Grand Total	Due Date	User	

ACTIVITIES

HISTORY

MEETINGS

EMERGENCY LIGHTING (TEST CERT)

INTEGRAL REPORT SHEET

SMS HISTORY

Create Quote

Create Invoice

1

2

Supercharged by SuiteCRM

Powered By SugarCRM

Server response time: 0.19 seconds.

BACK TO TOP

https://demomande.rakata.tech/index.php?module=RKTI_Jobs&action=DetailView&record=c2ad0754-2b62-9625-d01d-661b7205afc5#subpanel_rkti_jobs_meetings_1

Generate the quote and all details required to send to the customer

Create Quote

View Quotes

Import

Import Line Items

Timeline Diary

Grid Diary

Export Payroll Data

Vehicle Tracker

Export P&L Report

Job Meeting & Invoice report

Employee Day View

JOBS STATUS

COLOUR

Pending

Survey Booked

Survey Completed

Quote Sent for Authorisation

Quote Accepted

Job Raised (Booked)

Job In-Progress

Job Completed

State/Region: England

State/Region: BS16 4NL

Country: United Kingdom

Country: United Kingdom

Copy address from left: ☐

LINE ITEMS

Currency: GBP:£

Line Items:

Group Name:

Service

List

Discount

Sale Price

Tax Amount

Total

Replace boiler

100.00

Pct

100.00

20.00

20%

100.00

ADD PRODUCT LINE

ADD SERVICE LINE

Total:

Discount:

Subtotal:

VAT:

Group Total:

100.00

0.00

100.00

20.00

120.00

Revision #1
Created 14 April 2024 06:03:04 by RakataTech
Updated 15 April 2024 08:32:47 by RakataTech