

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

DEMO QUOTE JOB

Financials

#	Num	Title	Account	Status	Subtotal	Grand Total	Valid Until	User	Action
									Create Quote

#	Num	Title	Account	Status	Subtotal	Grand Total	Due Date	User	Action
									Create Invoice

ACTIVITIES

HISTORY

MEETINGS

EMERGENCY LIGHTING (TEST CERT)

INTEGRAL REPORT SHEET

SMS HISTORY

Supercharged by SuiteCRM | Powered By SugarCRM | Server response time: 0.19 seconds

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https://demomande.rakata.tech/index.php?module=RKTI_Jobs&action=DetailView&record=c2ad0754-2b62-9625-d01d-661b7205af5#subpanel_rkti_jobs_meetings_1

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

QUOTES

State/Region: England

Country: United Kingdom

BS16 4NL

United Kingdom

Copy address from left:

Currency: GBP:£

LINE ITEMS

Service	List	Discount	Sale Price	Tax Amount	Total
Replace boiler	100.00	Pct	100.00	20.00	100.00

ADD PRODUCT LINE | ADD SERVICE LINE

Total: 100.00

Discount: 0.00

Subtotal: 100.00

VAT: 20.00

Group Total: 120.00

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