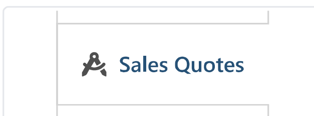
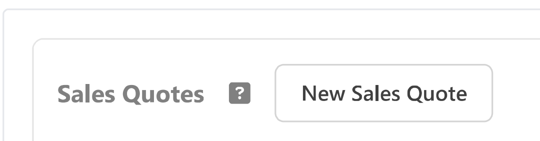
Sales Quotes

The **Sales Quotes** tab serves as a central area for creating, altering, and monitoring sales quotations provided to customers or prospects. This feature is designed to help businesses efficiently generate professional-looking quotes, detailing prices, products, or services prior to finalizing a sale. With this tool, we can swiftly manage follow-ups on these quotes and, if required, convert them into sales orders or sales invoices.



Creating a New Sales Quote

To create a new sales quote, click the **New Sales Quote** button.



Understanding the Sales Quotes Tab

The **Sales Quotes** tab features several columns that provide key information about each quote:

Issue Date

Date of issuance for the sales quote.

Expiry Date

Date when the sales quote is set to expire, if an expiry date has been established.

Reference

Sales quote reference number.

Customer

Name of the customer to whom the sales quote was issued.

Description

Description of the sales quote.

Amount

Total amount on the sales quote.

Status

The status of a sales quote can be **Active**, **Accepted**, **Cancelled**, or **Expired**. The status will automatically change to **Accepted** if the sales quote is linked to at least one Sales Order or Sales Invoice.

By utilizing the **Sales Quotes** tab effectively, we can streamline our sales process, enhance customer communication, and improve the likelihood of converting quotes into confirmed sales.