Entering a new quote

Note: *There are many features on the quote screen that are not required unless they suit your particular needs. You can safely ignore those features, the software will notify you if you missed a required field.*

Note: *These instructions are designed for the 'Full' menu of TBS CleverPLUS.*

Step 1: Click button 21 (Estimates+Quoting) in the 'SELLING' column.

Step 2: Click button A (Estimates / Quotes Entry) on screen 21 (Estimates+Quoting).

Step 3: Select the client you are quoting in the 'Client No' dropdown box near the top left of the screen. Now you will see all of the client's details on the screen. *Note: If you want edit the client's details you can double click the 'Client No' box.*

Step 4: Enter the name for this job / quote if required in the 'Quoted Job Name' box. Underneath there is a 'Conditions' box – enter any conditions for this quote like "ETA 14 days after your order".

Step 5: Click into the 'Comments' box. Here you can record your own notes about this quote and client – this won't appear on a quote printout.

Step 6: Click into the 'Product No' box in the bottom section of the screen. Select a product – the description, unit price and other information will appear. *Note: If you want edit the product's details* (and have owner permission) *you can double click the 'Product No' box.*

Step 7: Click into the 'Quantity' box on the same line and set the amount of that product to appear on your quote. You can also change the unit price if you wish.

Repeat step 6 & 7 until you have entered all items for this quote.

Step 8: Click on 'Total Quote' (light blue) in the top half of the screen. You will see all totals are now calculated.

Step 9: Click the 'Print' button at the top of the screen to see a preview of the quote and print it off if you wish. If the client you selected has an email address you can also click 'Email' at the top of the screen, the quote will be automatically converted to a PDF and emailed to your customer with a standard message.

Step 10: Once your client has accepted your quotation click 'Quote Accepted' on the right hand side of the screen. Now you can automatically transfer the quote into an invoice. Click 'Create Invoice' at the top of the screen and follow the prompts – easy!

You can now enter more quotes by clicking 'New at the top of the screen and following the same procedure or click 'Exit' to leave the quote screen.