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How Do You Enter a Quote?

Tammy Mason - 2022-07-20 - in Quotes, Orders & Invoices

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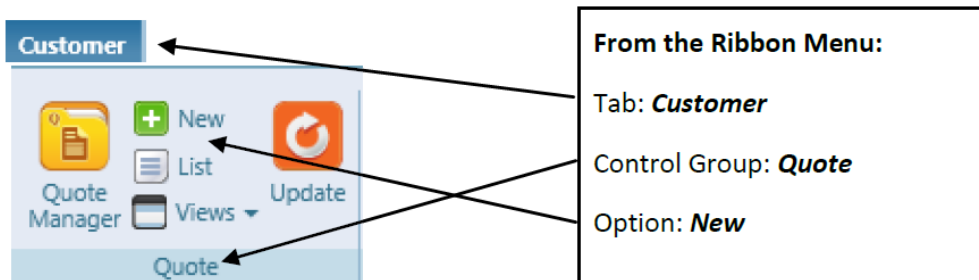
Explanation: A Quote is entered for a Proposal to a customer or to request costs from a vendor. Create a New Quote from the Quote Manager or Quote-New options.

Quotes are entered the same as Orders.

After saving the Quote, you can then "Send" to either email or print under the Views option for a Quote Request to a Vendor and/or a Quote Proposal to a Customer.