Masters

Masters in Sales module includes: Company, Contacts, Quotation Template, Contract Template.

Company master data and contact master data are the same data as Admin-Master.

Quotation Template

Authorized user can manage (add ,edit or delete) quotation template in this page. Click Quotation Template in Sales-Master tab, the quotation template list page opens as below,

image_1684358441622.png
Image not found or type unknown

Add New Quotation Template

To add a new quotation template,

1. Click image_1684359119878.png in the top right corner, the new quotation page opens,
Image not found or type unknown
image_1684359663438.png
Image not found or type unknown
2. In Template Name box, enter the quotation name.
3. In Category box, click to select categories to be included in the template.
4. In Department box, select department.
5. In Company box, select company name.
6. In Quotation Validity Days box, select
7. Click Save to save new template.

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