Quotation (CRM)

The "Quotation details" screen provides a consolidated view of all relevant information pertaining to a specific sales quotation. It is organized into several key sections, allowing users to quickly access and understand the status, contents, and associated information of a quotation.

Key Sections and Their Functionality:

Let's break down each section of the screen:

1. Top Navigation Bar:

- **"Quotations >"**: Indicates the user's current location within the system.
- **Icons (from left to right):**
    - **Edit (Pencil Icon):** Allows users to modify the quotation details (depending on the current status and user permissions).
    - **Preview (Eye Icon):** Enables users to preview how the quotation will appear (likely as a PDF or web page) to the customer.
    - **Mail (Envelope Icon):** Facilitates sending the quotation via email.
    - **More Options (Three Vertical Dots):** Provides access to additional actions related to the quotation (the specific options will vary but might include printing, downloading, cloning, etc.).

2. Quotation Header:

- **QUT202504000025**: The unique identification number assigned to this specific quotation. This is crucial for tracking and referencing the quotation.
- **"G"**: Likely the initials or identifier of the sales representative or user who created or is responsible for this quotation.
- **Grand Total: ₹ 2526.00**: The final calculated total amount for the quotation, including all items, discounts, and taxes (if applicable).
- **Potential Revenue: ₹ 0.00**: This field might indicate the potential revenue if this quotation is accepted. The discrepancy with the Grand Total could be due to the quotation being in draft stage, pending updates, or specific system configurations.

3. Quotation Status Tracker:

This visual progress bar clearly indicates the current stage of the quotation within the sales process.

- **Draft**: The initial stage where the quotation is being created and is not yet sent to the customer.
- **Approval**: The quotation might require internal approval before being sent to the customer.
- **Sent**: The quotation has been sent to the customer.
- **Negotiation**: The customer and the sales team might be in the process of negotiating the terms of the quotation.
- **Accepted / Rejected**: The final status of the quotation, indicating whether the customer has accepted or rejected it.
- **Current Status Highlight**: The filled-in circle and the bolded text (in this case, "Draft") indicate the current stage of this specific quotation.

4. "More Quotation" Button:

Clicking this button likely reveals a dropdown menu or expands the screen to show additional actions or information related to the quotation management process.

5. Left Sidebar - Quotation Details:

This section provides key contextual information about the quotation.

- **Quotation date: 16 Apr 2025**: The date when the quotation was created.
- **Valid till: 17 Apr 2025**: The date until which the quoted prices and terms are valid. It's crucial to note this expiry date.
- **Assignee:**
    - The name of the user or team member assigned to this quotation.
    - **(Address):** The associated address of the assignee.

6. Left Sidebar - Opportunity Information:

This section links the quotation to a potential sales opportunity.

- **Email:**
    - **[email address removed]**: The primary email address associated with this opportunity or contact person.
    - **Secondary email:** (Blank in the screenshot) An optional secondary email address.
- **Telephone:** The telephone number associated with this opportunity or contact person.

- **Mobile:** The mobile phone number associated with this opportunity or contact person.

7. Left Sidebar - Company Details:

This section provides information about the company for which the quotation is being created.

- **Company name: benches company**

8. Main Content Area - Tabs:

This area contains different tabs to view various aspects of the quotation.

- **Items & pricing (Currently Active):** Displays the list of products or services included in the quotation, their quantities, prices, and the calculated total.
- **Quotation history:** Shows a log of all actions and changes made to the quotation, including status updates, modifications, and communications. This is useful for audit trails and understanding the quotation's lifecycle.
- **Notes:** Allows users to add internal notes or comments related to the quotation, which might not be visible to the customer.

1. Quotation History Tab:

The "Quotation history" tab displays a chronological record of significant events and changes associated with a specific quotation. It allows users to track the lifecycle of the quotation and understand its current and past statuses.

2. Key Sections and Their Functionality:

Upon clicking the "Quotation history" tab, you will see a table with the following columns:

- **Quotation number:** This column displays the unique identification number of the quotation. In the screenshot, it shows **QUT202504000025-1**. This might indicate a specific version or instance of the quotation if revisions have been made.
- **Amount:** This column shows the total value of the quotation at a specific point in its history. In the screenshot, the amount is **₹ 2526.00**.
- **Valid till:** This column indicates the date until which the quotation was valid at a particular stage. In the screenshot, it shows **17 Apr 2025**.
- **Status:** This column displays the status of the quotation at a specific point in time. In the screenshot, the status is **Sent** (indicated by the teal-colored pill). This signifies that the quotation has been sent to the customer.
- **Action:** This column might contain icons or options for further actions related to a specific entry in the history. In the screenshot, there are three vertical dots, which

typically indicate a menu of additional options (e.g., viewing details, downloading a version, etc.).

3. Functionality and Use Cases:

- **Tracking Quotation Progression:** The "Quotation history" allows you to see the different stages a quotation has gone through. This helps in understanding the timeline and current standing of the offer.
- **Identifying Key Actions:** You can see when the quotation was likely created, sent, and potentially any other status changes that might be recorded in a more comprehensive history.
- **Reviewing Past Details:** If the system tracks changes over time, the history might allow you to see the amount and validity period at different stages of the quotation.
- **Troubleshooting and Auditing:** The history can be valuable for understanding why a quotation is in a particular state or for auditing the steps taken in the sales process.
- **Accessing Previous Versions (Potentially):** The "Action" menu (three vertical dots) might provide access to view or download previous versions of the quotation if the system maintains them.
- **"View all" Link:** The "View all" link in the top right corner suggests that there might be more historical entries than initially displayed. Clicking this would likely show a complete log of all activities related to the quotation.

---Thank You----