Quotation Configuration & User Guide

Quotation Settings:

- ➔ How to configure a Quote Profile?
- ➔ How to Generate Quote to an Account / Customer/ Deal?
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Description: A Sales Quote creates a binding between user and the would-be customer in terms of sharing the pricing, the charges and the terms. Generating and sharing a quote with User customer is a matter of few clicks in Maple CRM.

Quotation templates allows User to define various flavours of quotes; with and without tax/discounts etc.

Generate formal quotations and share with the customers easily. Use email templates to send the quotation to customers in seconds!!.

Quotation Approval Process : Maple CRM provides User the feature to ensure that no quotations go out of the organization without pre-approval.

Maple supports 3 layers of Quotation templates,

- **Customized Templates** – These are templates that Maple custom build for Customers.
- **Standard Templates** supported by Maple (gst_simple and gst_detail)
- **Default Templates**

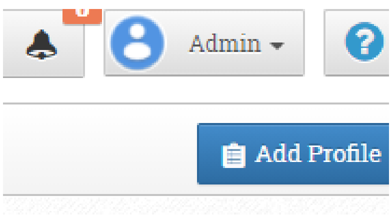
Templates will be available under Settings -> Quote Template. The templates can be enabled by Maple Support Team so that other Admin users can create multiple quotation profiles from each of the template.

- ## How to configure a Quote Profile?

Description: Multiple Quote Profiles can be created with below conditions,

- **With/ Without Discount**
- **Per Line Item Discount/ Overall Discount**
- **With Tax / Without Tax**
- **Per Line Item Tax/ Overall Tax**
- **With Product Image/Without Product Image**
- **With different Currencies; India, USD, AED, JPY, NZ etc**
- **With /Without Additional Sections**

To configure **Quote Profile**, follow the steps below:



1. Go to **Settings** on the top right section
2. Click on **Quotation** -> **Quotation Profiles**
3. Click on **Add Profile**
4. Enter **Company details** ; **Name , Company Logo, Address, GSTIN, Contact Person etc**
5. Select the required details to show in the final **Quotation PDF,**
    - **Add Serial Number**
    - **Include Images**
    - **Include Discount Details in Quotation**
    - **Include Total Amount (sum of products, services and other services)**
    - **Add Page Number**
    - **Include Product Description**
    - **Include Tax**
6. Select the template from the drop down list

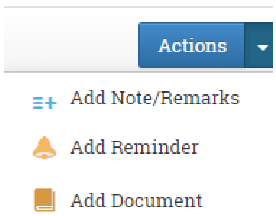
7. Click on **Add Section** in the bottom of the same page. This is to add all "Terms and Conditions", Bank Details for Payment or any other details .
   There can be multiple sections with different type ; Text, Name – Value and Approval.
8. **Save** the profile.
9. Set the profile as **Active profile** to enable this profile and make as default

- ## How to generate a Quotation to an Account / Customer/ Deal ?

Description: User who has the permission to generate the Quotation can follow the below steps to generate the Quotation.

Quotation can be generated with all the Products and Services enquired by the lead/customer with Terms and Conditions.

To generate **Quote**,



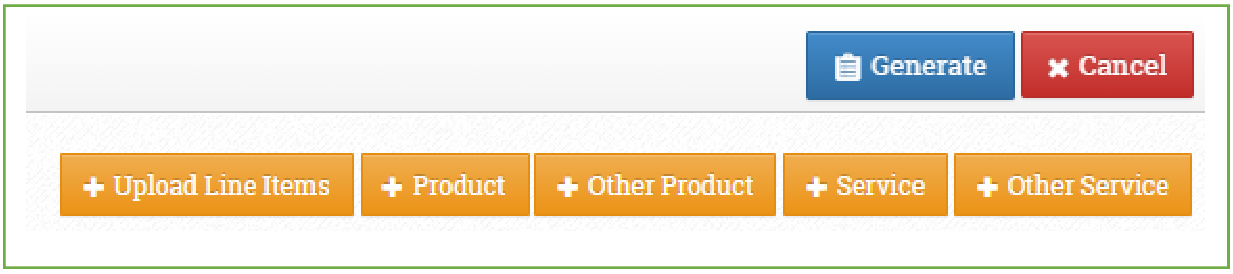
1. Open the **Account/Customer/Deal** to which the Quotation needs to be generated
2. Go to the **Manage** page
3. Click on **Generate Quotation** under **Actions**
4. Select the required **Quotation Profile** and **Next**
5. Set the **Quotation Validity Date**
6. Modify the customer details if required
7. Add the Product and Service from **+Product and +Service** list or **+Other Product** and **+Other Service**

8. Every product and service line item can be edited for changing quantity/ discount or any other product details. Edit Option is available in Quotation Items.
9. User can click on cross mark to remove the item from the Quote.
10. The total amount, tax and discounts are automatically calculated and shown as Quotation Total
11. Cross check the additional sections [if added] for any changes.
12. Click on **Generate**.

Note : User can edit the Quotation on stage. On Editing a Quotation and Save , this will create a new version with new changes and older remain for reference.

- ## How to do Add Product and Services to Quotation?

Description: There are 2 ways which User can add the Product and Service to the Quotation.



1. **These are from Product and Service list which are preadded in the system**.
   a. Click on +**Product** and +**Service** list.
   b. User can filter by Product/ Service Group or search the product/service by name /id .
   c. Double Click on the product to choose it.
   d. Do changes in Quantity [price will get calculated automatically with Quantity], Description, and Tax
   e. Click on **Add To Quote**
   [Note : Only one product/service can be added at once]

OR

2. **If the Product/ Service is New and not available in the list, then User have to follow below steps,**
    a. Click on **+Other Product** and **+Other Service**
    b. Give the Product Name, Quantity, Unit Price, HSN/SAC, Description and Tax.
    c. Click on **Add To Quote**
    [Note : Only one product/service can be added at once]

AND

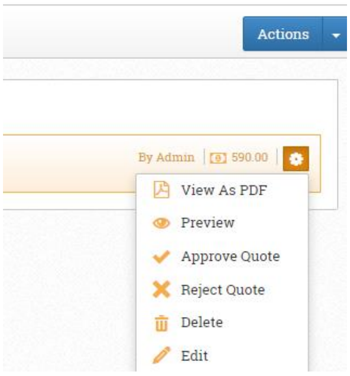
If there are many Product Line Items in the Excel/CSV sheet, then User can follow below steps to add those to Quote. This is available only if Quotation is available under Deals.

a. The excel product line item file must in . CSV
b. The product column order in CSV must follow the format shared by Maple Support Team
c. Click on **"+Upload Line Items"** and **Upload**

- ## What is Quotation Approval Process ?

Description: Maple CRM provides User the feature to ensure that no quotations go out of the organization without pre-approval from Admin/ Manager.

Once the Quote is generated, User has to send the Quote for Approval.



To Send Quote for Approval,

1. Click on gear icon in the Quotation listing page and **Approve Quote**
2. User has to choose the name of user from the list to whom the **Quote Approval Request** has to be sent
3. Once user click on **Send**; this will a send mail to that User about the Quote Approval request and also creates a reminder to him in the system.

To Approve Quote,

1. Click on the **Quotation Manager**
2. Click on dropdown icon beside of Quotation Number or on the Quote reminder in the Dashboard
3. Click on "**View as PDF**"/ Preview to check the details
4. Click on **Approve Quote;** if everything is correct
5. Now User can **Email this Quote** directly from CRM

Note:

- User can Reject the Quote if any corrections need to be done with Correction Note.
- Once Customer has Accepted the Quote, User can mark it as Customer Accepted/Rejected.

- ## Where can User find all the Quotations / Quotation Report ?

Description: User can take the report on Quotation to view; how many Quotations are Generated/For Approval/ Approved/Rejected/ Customer Approved/Customer Rejected/ Cancelled/Converted.

1. Go to **Quotation Manager** on the left side menu
2. Click on **Summary Report**
3. Give the condition **;** Quotation Status, Quotes Generated Dates, Owner wise/Customer wise
4. Click on **View**
5. Click on **Download to Excel** option