

# How to create Quotation?

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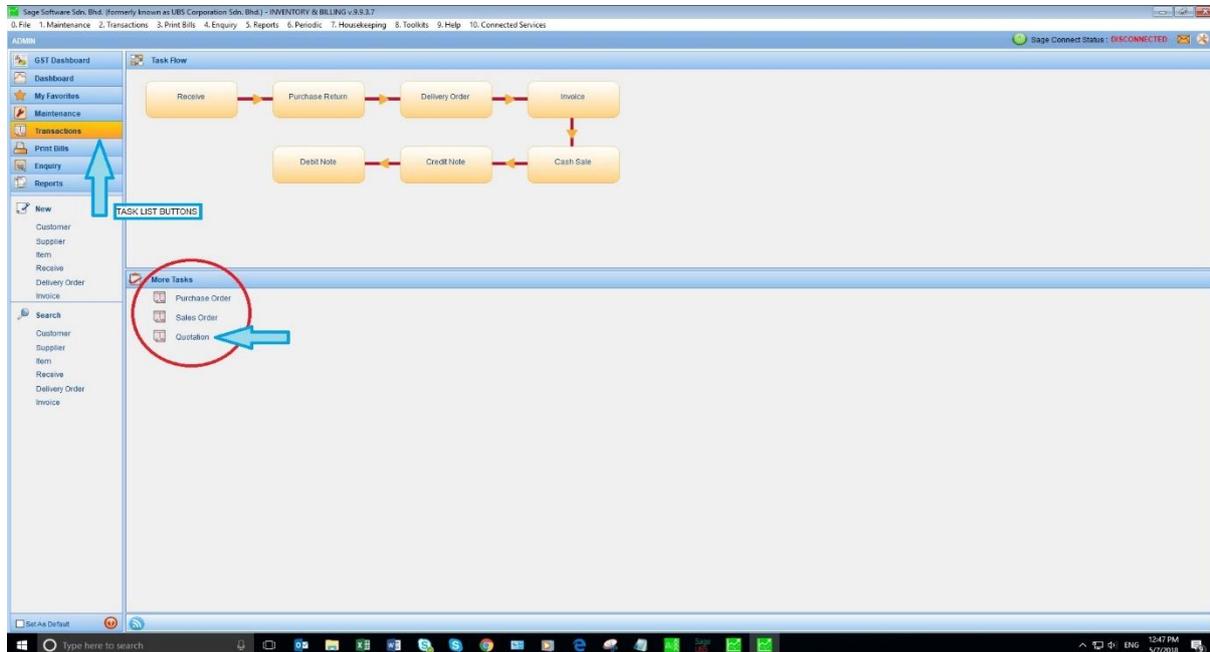
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## Document Change Control

Version	Date	Author	Summary of Changes
9.9.3.7	07/05/2018	Steven	Initial Creation

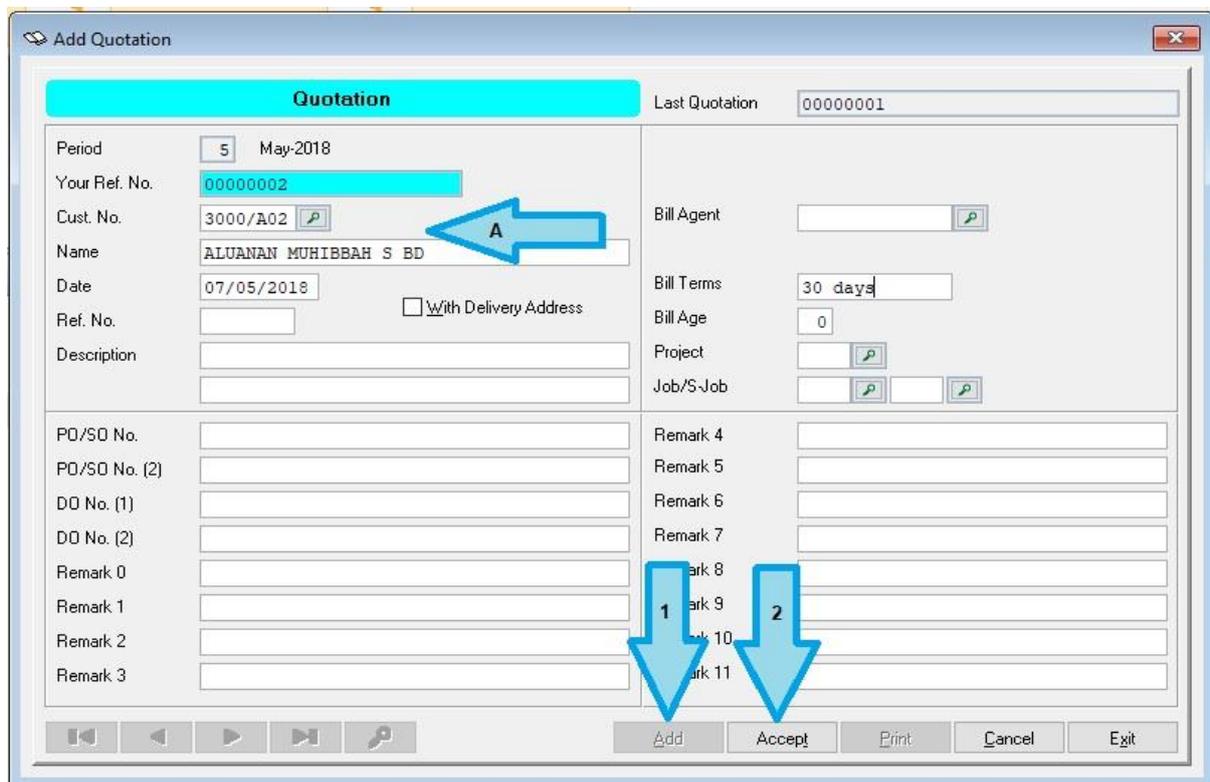
## How to create quotation in Sage UBS Billing module.

**Step 1:** Click on transaction on left side of screen, task lists. See below, illustration of the function:



**Step 2:** Look at more tasks below and click Quotation.

**Step 3:** Please see in picture illustration below: (The Bill Header)

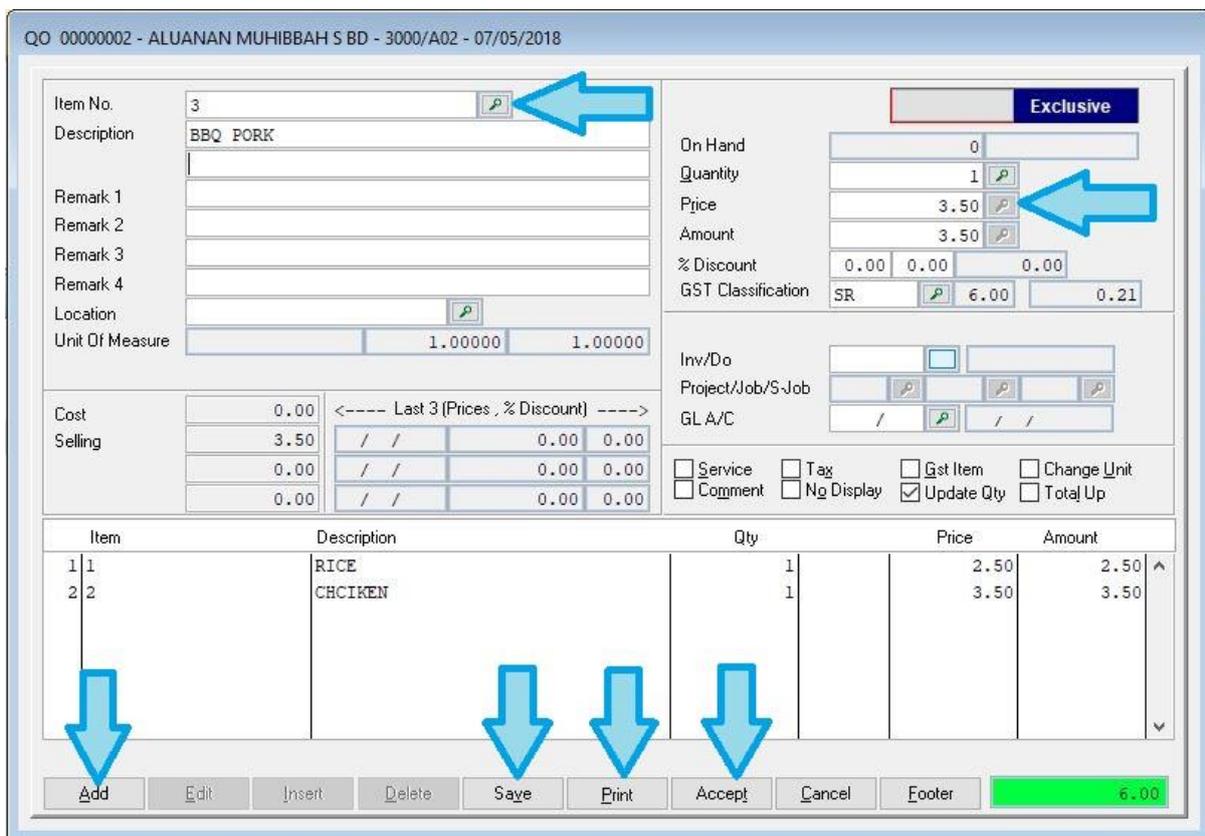


In the picture, Arrow-head1, please click on [ Add] to insert a new bill into the database. This is to allow the system to create a new bill.

In Arrow-head, please choose a customer profile or create a new customer code. To choose, click on the small green icon at the end of the field name [ Cust. No.]. To create a new customer profile, type in a customer code like 3000/A05, this must be a number that was not used before and the screen will pull out a form for you to fill in some details. You need [ Save] after filling up the form.

In Arrow-head2, [ Accept] This is to confirm that all details typed in the above form is correct information that will be printed out on top of the bill which is called Bill Header. The [ Accept] button will also bring you to a new form called [ Body/Details of the bill]

**Step 4: Details of the Bill. [ The Bill Body/Detail] Please see below, picture illustration:**

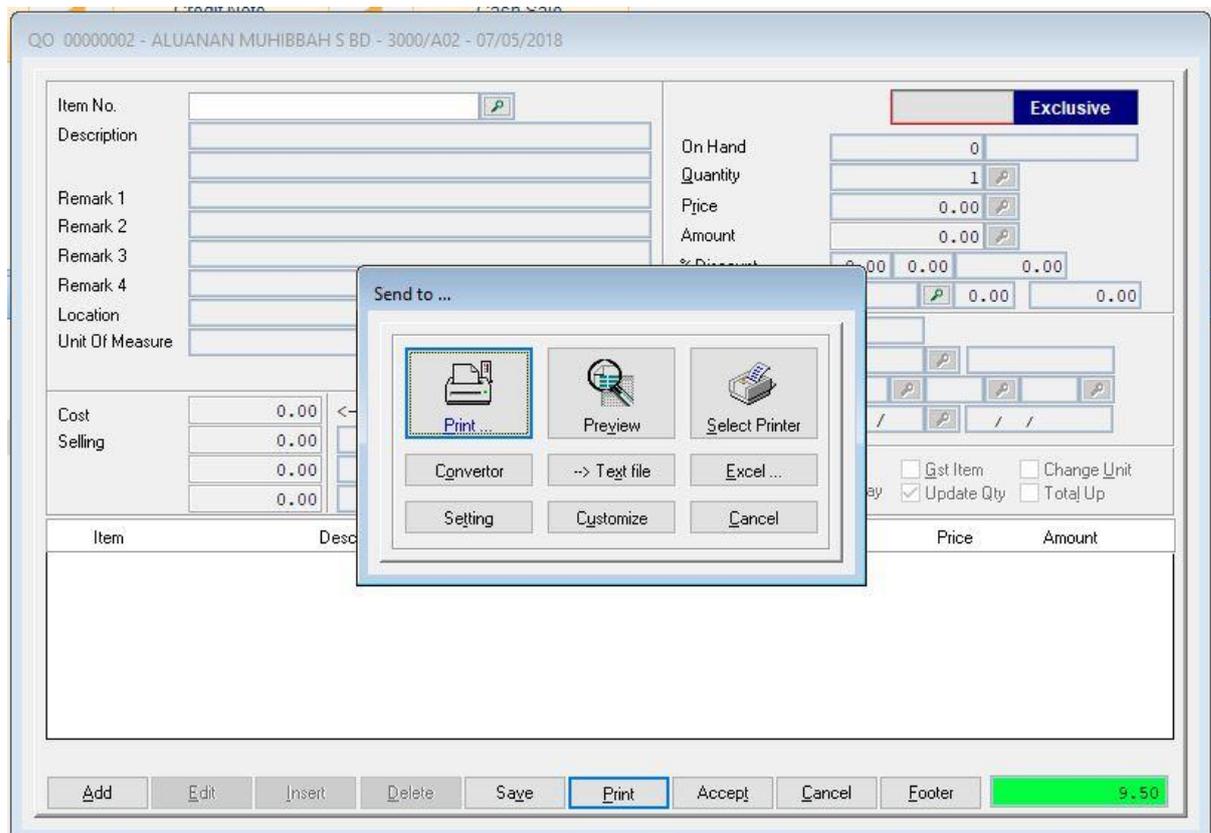


**In a simple Quotation Bill, you can enter details by:**

1. [ Add] click this button to add items. You need to search using the button at the end of the field [ Item No.]. You also can create a new item code with details by creating a new unique code in the field. Just type in a number or alphabet. In example I use (1,2,3,4,5, etc....) as item number / item code. Once you have a list of codes or items it will remain in the system forever. You only need to choose and select. Just like what you did in the choose or create customer at the Bill Header.
2. Each item needs a price and quantity. The system picks up information in this manner, price x quantity. This gives you a total or subtotal (Amount), then adjust the data for discounts and Tax(GST).
3. [ Save] button. Don't forget to save the details after each item is created for the bill.

4. You can Print after you have included all the details are keyed in.
5. [ Accept] button confirms the transaction. Print also confirms the transaction after editing and adding new items to the bill.

**Please see below for Printing functions:**



Print will pull out a menu to select printer and printer properties and options. To simplify just click [ OK] to print.

Preview, allows you to see what will be printed before you [ Print].

[ Select Printer] allows the user to preset printer selection to default before they hit [ Print → Ok].

[ Convert / Excel / Text File] buttons allow you to create the bills in different forms or documents.

[ Setting / Customize] These are buttons that allows user to change the presentation of the bill format.

[ Cancel] Exits the print options screen.

Please see below a picture sample of how a Print → Preview looks like:

<p><b>Sage Software Sdn. Bhd. (formerly known as UBS Corporation Sdn. Bhd.) 441389-K</b>                  Suite 1B-6, Level 6, Block 1B,                  Plaza Sentral, Jalan Stesen Sentral 5,                  Kuala Lumpur Sentral,                  50470 Kuala Lumpur.</p>						
<p><b>ALUANAN MUHIBBAH S BD</b> 111</p>			<p><b>QUOTATION</b></p>			
<p>AT TN. : MS KOH                  TEL. :                  FAX :                  A/C NO. : 3000/A02</p>			<p>NO. : 00000002                  DATE : 07/05/2018                  TERMS : 30 days                  PAGE : 1</p>			
ITEM NO.	DESCRIPTION	QTY	U PRICE	DIS.	TAX	AMOUNT
11	RICE	1	2.50		0.15	2.65
22	CHICKEN	1	3.50		0.21	3.71
33	BBQ PORK	1	3.50		0.21	3.71
<p>RINGGIT MALAY SIA : TEN AND CENTS SEVEN ONLY</p>						
<p>TOTAL QUANTITY 3</p>			<p>TOTAL 9.50</p>		<p>DISCOUNT 0.00</p>	
			<p>NET 9.50</p>		<p>TAX 0.57</p>	
			<p>GROSS RM 10.07</p>			
<p>AUTHORISED SIGNATURE(S)</p>			<p>RECEIVED BY</p>			