

Quote – Create View

Module: Sales

Screen Type: Create View

URL: `/^sales/quotes/create/`

Model: Quote

Record Name: Quote

Plural Name: Quotes

What This Screen Is For

TODO: Explain what this screen does in plain language.

What You See on This Screen

 *Add a screenshot of this screen.*

Fields on This Screen

Field	Type	Description
Last Modified At	Date & time	<i>TODO</i>
Last Modified By	Relationship (single) (optional)	<i>TODO</i>
Quote #	Text	A quote's friendly name, used to identify the transaction in lists, reports, and searches
Customer	Relationship (single)	The customer that will be receiving this quote
Salesperson	Relationship (single) (optional)	The salesperson assigned to this quote
Warehouse	Relationship (single) (optional)	The physical location from which inventory items for this quote would be sourced
Status	Text (choice)	<i>TODO</i>

Field	Type	Description
Memo	Long text	An optional field to record notes and other information about this quote
Customer Po #	Text	An optional field to make note of the customer's purchase order number
Subtotal Currency	Text (choice)	<i>TODO</i>
Subtotal	Number (decimal)	The total sales price of all line items before sales tax
Taxtotal Currency	Text (choice)	<i>TODO</i>
Tax Total	Number (decimal)	The total sales tax due for this sale
Total Currency	Text (choice)	<i>TODO</i>
Total	Number (decimal)	<i>TODO</i>
Converted	Yes/No	Marks this quote as converted to an invoice and completed

System Fields (Managed Automatically)

⚙️ These fields are managed by the system and usually do not need to be edited.

Field	Type	Description
Id	Auto number (ID)	<i>TODO</i>
Created At	Date & time	<i>TODO</i>
Created By	Relationship (single) (optional)	<i>TODO</i>
Custom Fields	Extra Fields JSONField	<i>TODO</i>
Deleted At	Date & time (optional)	<i>TODO</i>

Common Tasks

- *TODO*

Tips & Helpful Hints

☐ *TODO*

Who Uses This Screen

- *TODO*

Related Screens

- **List View** — [sales-quotes](#)
 - **Detail View** — [sales-quotes-id](#)
 - **Update View** — [sales-quotes-id-update](#)
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Advanced Notes

TODO

Revision #1

Created 2026-01-09 03:13:37 UTC by Brisk

Updated 2026-01-09 03:13:37 UTC by Brisk