RekordPOS | Quick guide

Give a price before the sale.

Write a quotation, send it, and turn it into a bill when the customer says yes.

A quotation is an offer: these goods, at these prices, valid until this date. RekordPOS keeps it, tracks whether the customer has accepted, and bills it with one action when they do, so nothing is typed twice.

IN THIS GUIDE

1. **Start a quotation**
   Choose the customer and the valid until date
2. **Add the products**
   Search by name or code
3. **Save and send**
   Print it or send it as a PDF
4. **Convert to a bill**
   When the customer accepts

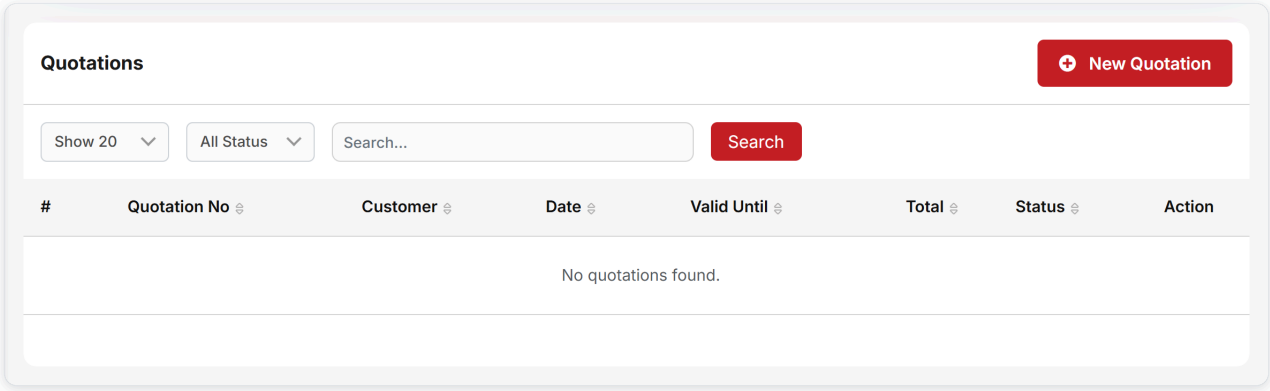
WHERE
Sales menu, then Quotations

STATUSES
Draft, Sent, Accepted, Rejected, Converted

TIME
Two minutes

1 The quotation list

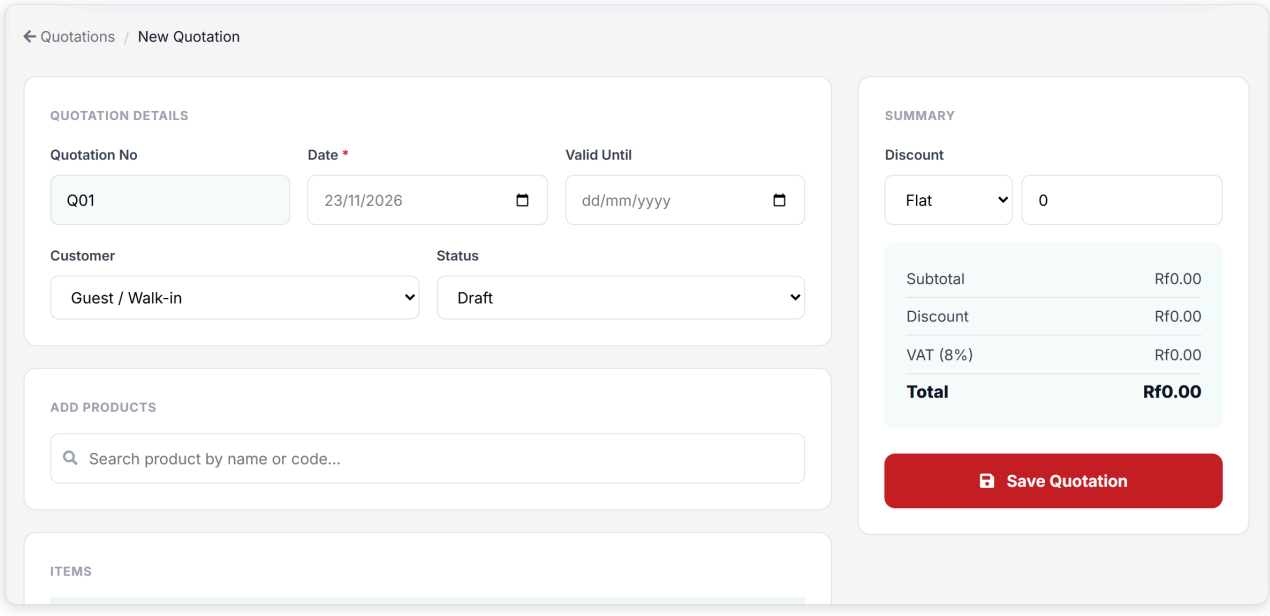
Open **Quotations**. The list shows each quotation with its number, customer, date, the date it is valid until, the total and its status. Use the status filter at the top to see only drafts, only those sent, or only those accepted. A quotation past its valid until date is shown in red.



The quotation list. A new shop starts with none.

2 Start a new quotation

Press **New Quotation**. The number is filled in for you. Choose the **customer**, or leave it as Guest, set the **date** and the **Valid Until** date, and choose a **status**. A new quotation is a Draft until you send it.



A new quotation. The summary on the right adds up as you go.

3 Add the products

Click **Add Products** and type a product name or code. Pick the one you want and it joins the list below, with its unit price, quantity, sub total, tax and line total. Change the quantity or the price on any line. The **Summary** on the right shows the sub total, a **Discount** you can set as a fixed amount or a percentage, the tax and the **Total**.

4 Save it

Press **Save Quotation**. It is kept in the list. From there you can open it, edit it, download it as a **PDF** to send to the customer, and change its status as the customer replies: **Sent** when you send it, then **Accepted** or **Rejected**.

5 Convert it into a bill

When the customer accepts, do not type the sale again. **Convert** the quotation, and it becomes a bill for the same goods and prices. Its status changes to **Converted**, and a quotation that has already been billed cannot be billed a second time.

> **Prices change.** A quotation keeps the prices it was written with. If your prices have moved since, check the quotation before you convert an old one.

6 Questions

How long should a quotation be valid?

Choose a date that gives the customer time to decide but protects you from price changes. Two to four weeks is common.

The customer wants changes

Edit the quotation, then send the new PDF. Keep one quotation per deal rather than starting a new one each time.

It is for a customer who is not in the list

Leave the customer as Guest, or add them first from the Customers menu.