

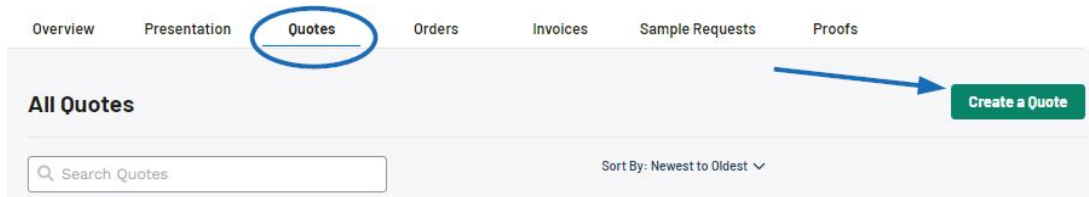
# ESP+

Knowledgebase > Quotes, Orders & Invoices > Quotes & Proofs > Create a Quote from the Project

## Create a Quote from the Project

Jennifer M - 2024-09-25 - Quotes & Proofs

To begin a quote, open the project and click on the "Create a New Quote" button in the Quotes tab.



In the Create a New Quote for Project window, fill in as much information as possible. Please note that the Quote Date, Sales Person, and Order Contact are required. Once you are finished filling in the fields, click on the "Create" button.

## Create a New Quote for Project

This quote will be added to the project and can be added to or updated when viewing the project overview's quotes, orders and invoices tab.

### Quote Information

#### Quote Date \*

09/10/2024

#### Sales Person \*

ESP User

#### Order Contact

Order Contact Disabled in Setti

#### PO Reference

4301212317

#### In-Hands Date

10/30/2024

Flexible  Firm

#### Ship Date

10/23/2024

Blind Ship

#### Shipping Method

Select a Shipping Method

#### Shipping Account

Add a Shipping Account #

#### Payment Method

Select a Payment Method

#### Credit Terms

Select Credit Terms

Create Quote

Once you the Quote has been created it will open to the quote detail page in the Quotes section. Next, add products and/or services to the quote.

### Add Product(s)

Click on the "Add Products" button.

Overview Presentation **Quotes** Orders Invoices Sample Requests Proofs

### Quote #1007

**Products & Pricing**

Decoration

Shipping

Related Orders

Notes

**You don't have any products in this quote yet.**

Add products you think your client would like to your quote.

**Add Products** **Add Service**

The Add Products window will open with five options for including items in a quote. As products are added, a list will build in the Selected Product & Services panel of this window. The options for adding products are:

### **Quick Add**

The Quick Add option enables you to select from any item in ESP by entering search terms in the "What are you looking for?" box. Type keywords, product numbers, or customer product numbers in the box.

Use the checkbox to select the product(s) you would like to include in the quote.

When you are finished, click on the "Add Products" button.

[See the Quick Add section in action!](#)

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### **Collection**

The Collection option enables you to select any item that has been saved in a Collection. Use the "Select a Collection" dropdown to view the five most recent collections. You can also use the Search Collections box to type a collection name. Click on the collection listing to display items within.

Use the checkbox to select the product(s) you would like to include in the quote.

When you are finished, click on the "Add Products" button.

[See the Collection section in action!](#)

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### **Presentation**

The Presentation option enables you to select any item that has been included in a presentation. Use the "Select a Presentation" dropdown to type a presentation name. Click on the presentation listing to display items within.

Use the checkbox to select the product(s) you would like to include in the quote.

When you are finished, click on the "Add Products" button.

[See the Presentation section in action!](#)

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### **Order**

The Order option enables you to select any item that has been included in an order. Use the "Select an Order" dropdown to view recent orders or use the Search Orders box to type an order number, company name, or project name. Click on the order listing to display items within.

Use the checkbox to select the product(s) you would like to include in the quote.

When you are finished, click on the "Add Products" button.

[See the Order section in action!](#)

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## Custom Product

The Custom Product section enables you to create a quote with a custom item. While the Product Name and Supplier are required, it is recommended that you include as much information as possible. Once you have finished entering information, click on the "Add Custom Product" button. The product will be moved into the Selected Products & Services section.

Use the checkbox to select the product(s) you would like to include in the quote.

When you are finished, click on the "Add Products" button.

[See the Custom Product section in action!](#)

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## Add Service

Click on the Add Service button and configure the service information.

When you are finished adding products, the items will be listed in the Products & Pricing section. To edit the information and pricing for this item, click on the "Configure Product" button.

The screenshot shows a quote interface for 'Quote #1007'. On the left is a sidebar with navigation options: 'Products & Pricing' (highlighted in blue), 'Decoration', 'Shipping', 'Related Orders', and 'Notes'. On the right, a product card displays '11 oz. Traditional Ceramic Coffee Mugs' with product ID 'A7102 | CPN-13939109'. Below the product name is the supplier 'BEL Promo' with ID 'asi/39552' and a 5-star rating from 130 reviews. A message states 'There is currently no configuration for this product.' A green 'Configure Product' button is circled in blue. An 'Add' button with a dropdown arrow is in the top right corner.

### Related Content

- [Edit Product Information within a Quote](#)
- [Send the Quote to the Customer](#)