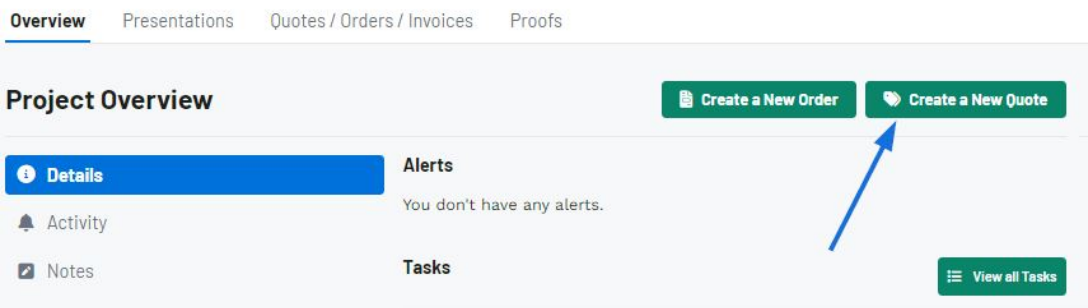
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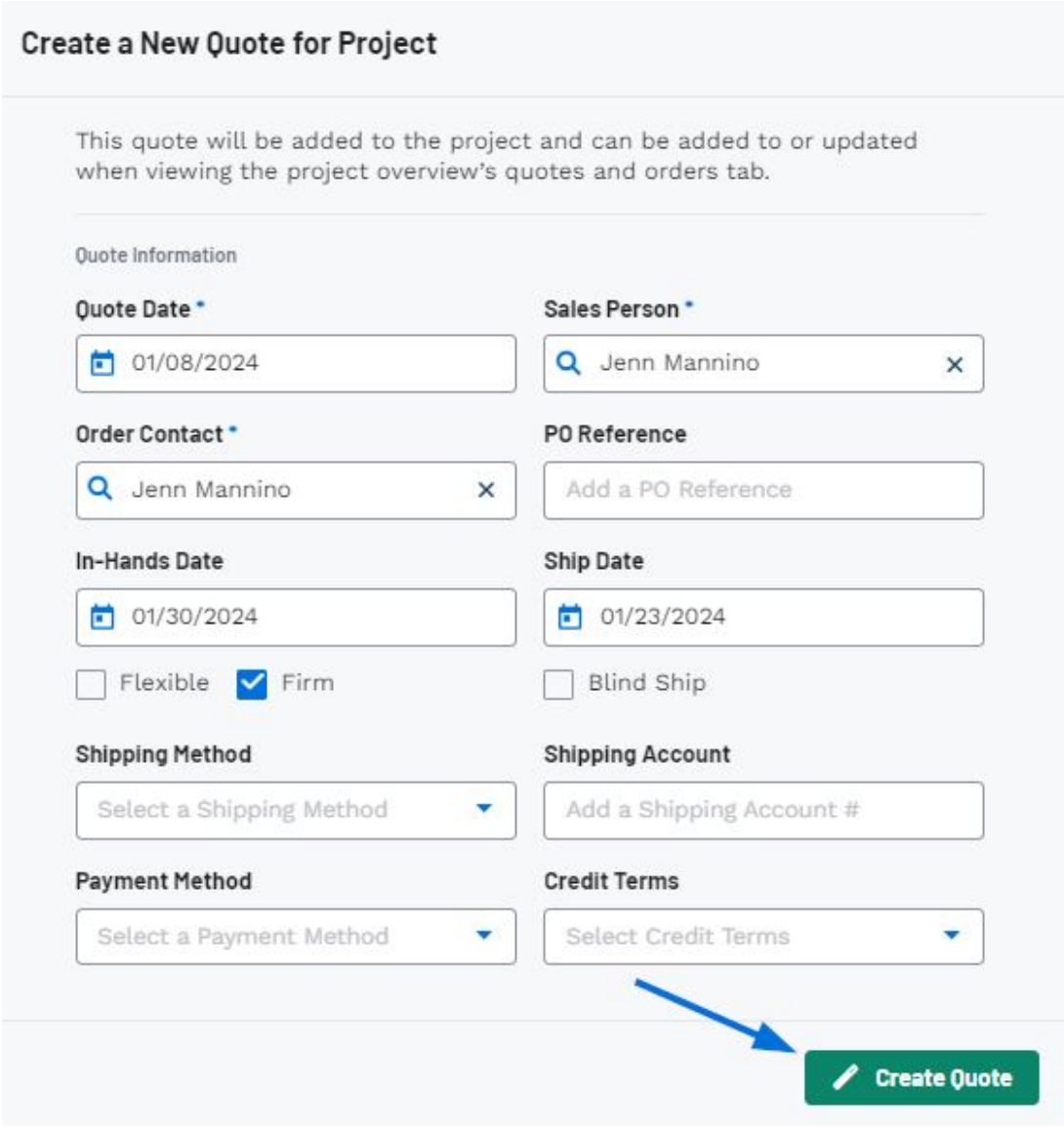
# Create a Quote from the Project

Jennifer M - 2023-07-11 - Quotes & Proofs

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



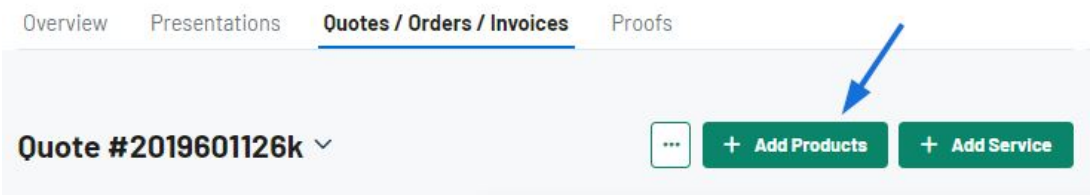

In the Create a New Quote for Project window, fill in as much information as possible. Please note that the Quote Date, Sales Person, and Order Contact are required. Once you are finished filling in the fields, click on the "Create" button.




Once you the Quote has been created, you will be brought into the Quotes/Orders/Invoices tab. The next step is to add products or services to the quote.

## Add Product(s)

Click on the "+Add Products" button.




The Add Products & Import Services window will open and there are five options for adding products:

## Add Product(s) using 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 & Configure" button.

See the Quick Add section in action!

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### Add Product(s) from a 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 & Configure" button.

See the Collection section in action!

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### Add Product(s) from a 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 & Configure" button.

See the Presentation section in action!

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### Add Product(s) from an Order

The Order option enables you to select any item that has been included in a 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 & Configure" button.

See the Order section in action!

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### Add Product(s) using a 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 & Configure" button.

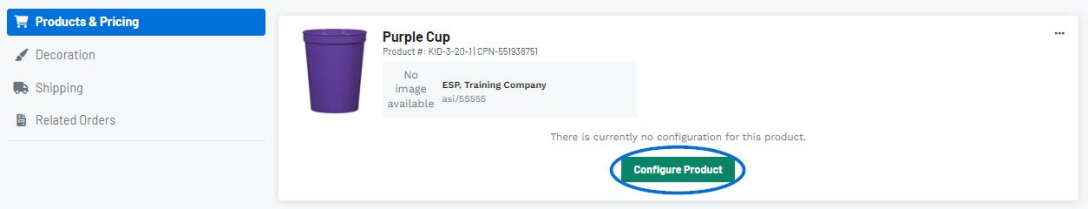
See the Custom Product section in action!

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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.




Related Content

- Edit Product Information within a Quote
- Send the Quote to the Customer