

# How do I create an offer for a customer ?

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Entering an offer for a customer is done from the **Offers** file, accessible via the **Sales** menu. Call the **Action>New** command or the **New** button.

The window for entering an offer consists of the following main items:

**Number** (usually assigned automatically by the program)

**Date** (usually the current date)

**Subject to VAT and VAT included:** depends in principle on the customer for whom the offer is intended

**Delivery date**

**Our/Your reference**

**Customer code:** enter the customer's code or the beginning of the customer's name preceded by a slash (e.g. /Center). If the program finds several potential customers, a selection window will appear. Once the desired customer has been selected, its address is copied into the offer.

**Item code:** Enter the code or the beginning of the short name of the article. If the program finds several articles, a selection window is displayed. Once the desired item has been selected, fill in the quantity, a possible discount rate, a price and a unit. Repeat the operation for each item to be mentioned in the offer.

**Terms:** payment term

**Discount:** discount granted

**Total :** total of the offer calculated automatically, which you can nevertheless correct (for example to round it off).

**Decision :** once you know the customer's decision regarding your offer, indicate it here to avoid unnecessary follow-up with the customer and for your statistics.

**Letter and Spreadsheet** buttons: these buttons give access to the word processor and spreadsheet integrated into the software. You can write a text or make calculations explaining the method of arriving at the amounts of the offer. These appendices can be reserved for internal use or printed at the same time as the offer.

**Remarks and conclusion**

Once you have entered all the information, validate the offer to save it.

Online URL: <https://om-bm.knowledgebase.co/article-249.html>