

Create and Manage Quotations and convert to Sales, Order & Invoice in RunOnweb

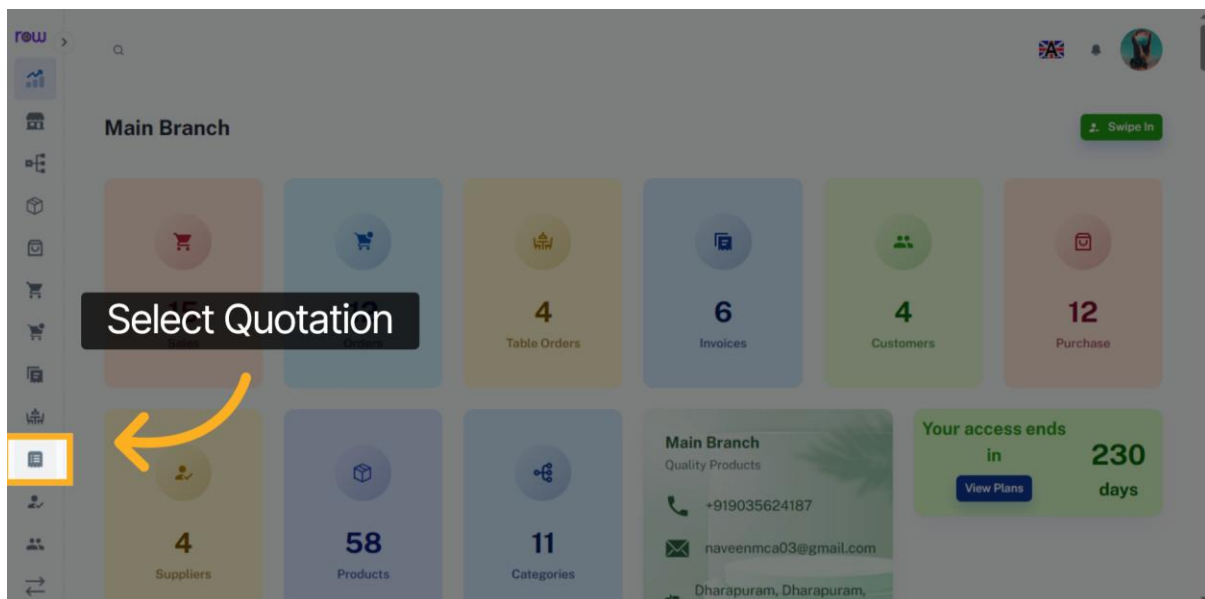
Go to runonweb.com

1. Introduction

In this tutorial, you will learn how to create, update, and cancel a quotation, as well as how to convert a quotation.

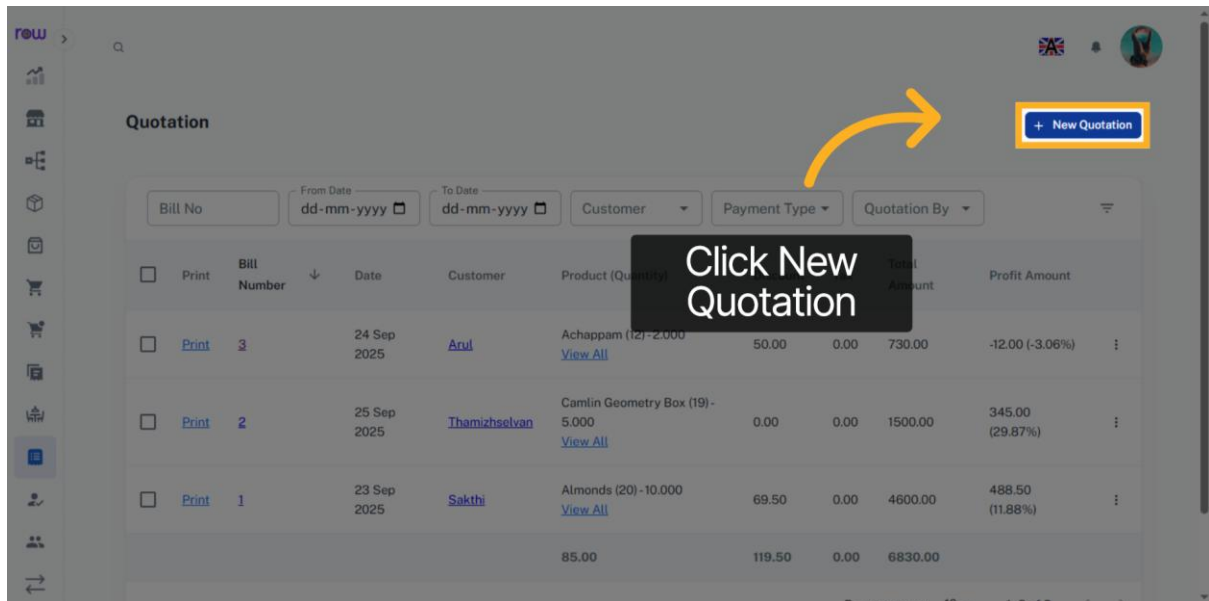
2. Quotation Menu

Select the Quotation menu to open the Quotation list screen.



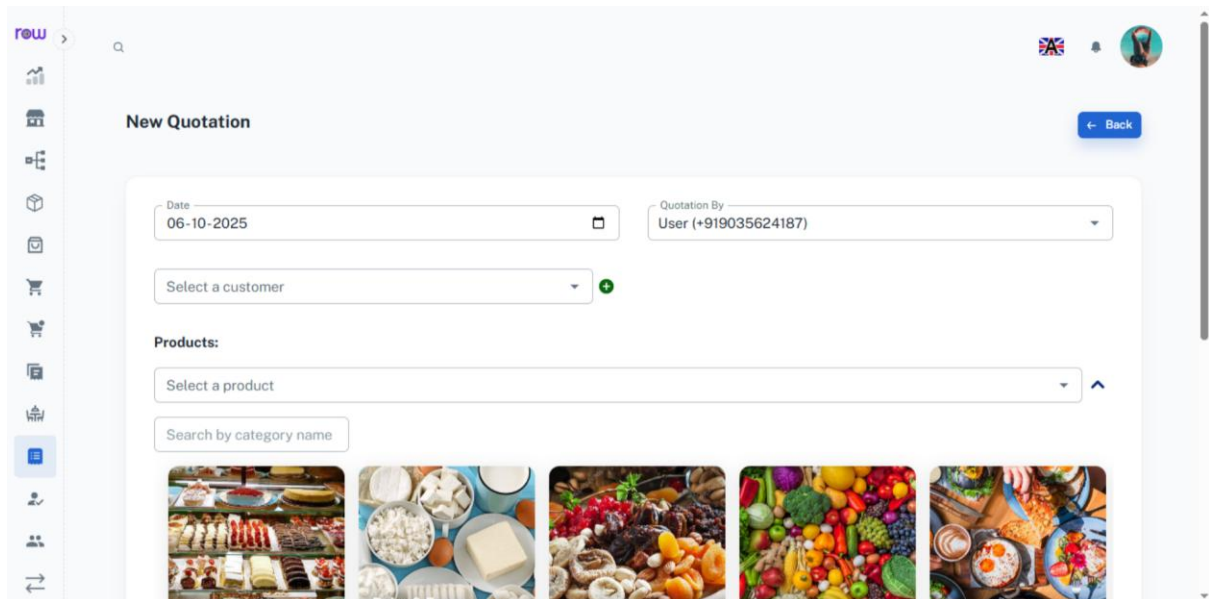
3. New Quotation Button

Click the New Quotation button to start creating a Quotation.



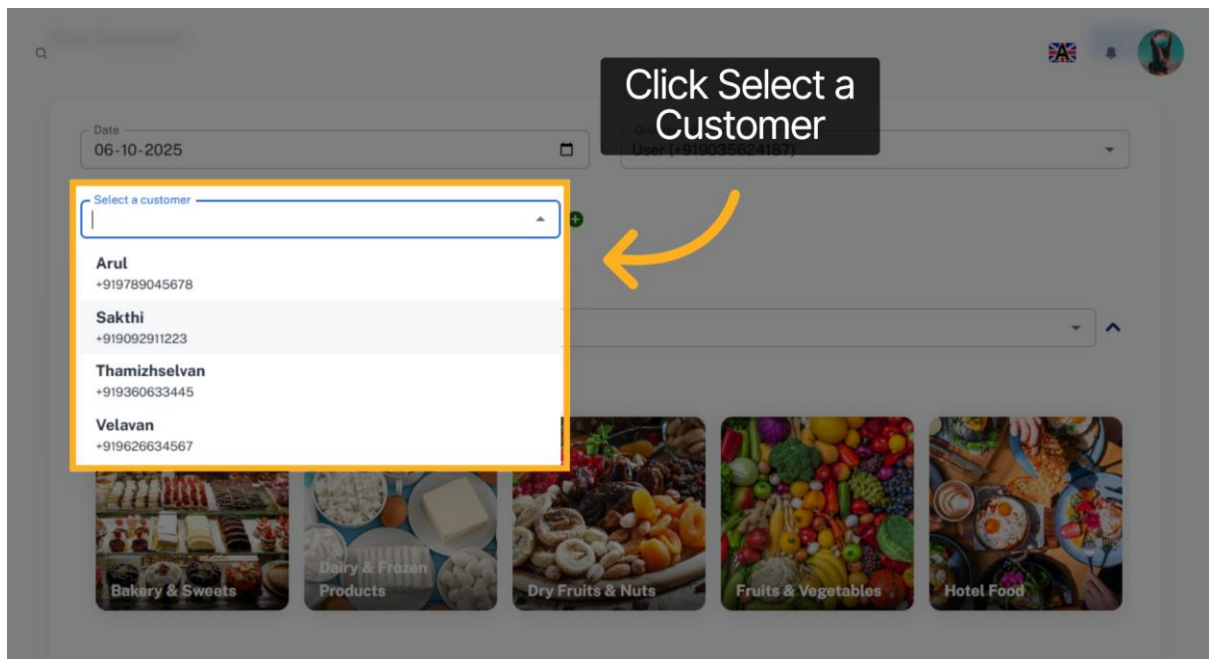
4. New Quotation

Date, Quotation by are already filled in. You can update them if needed.



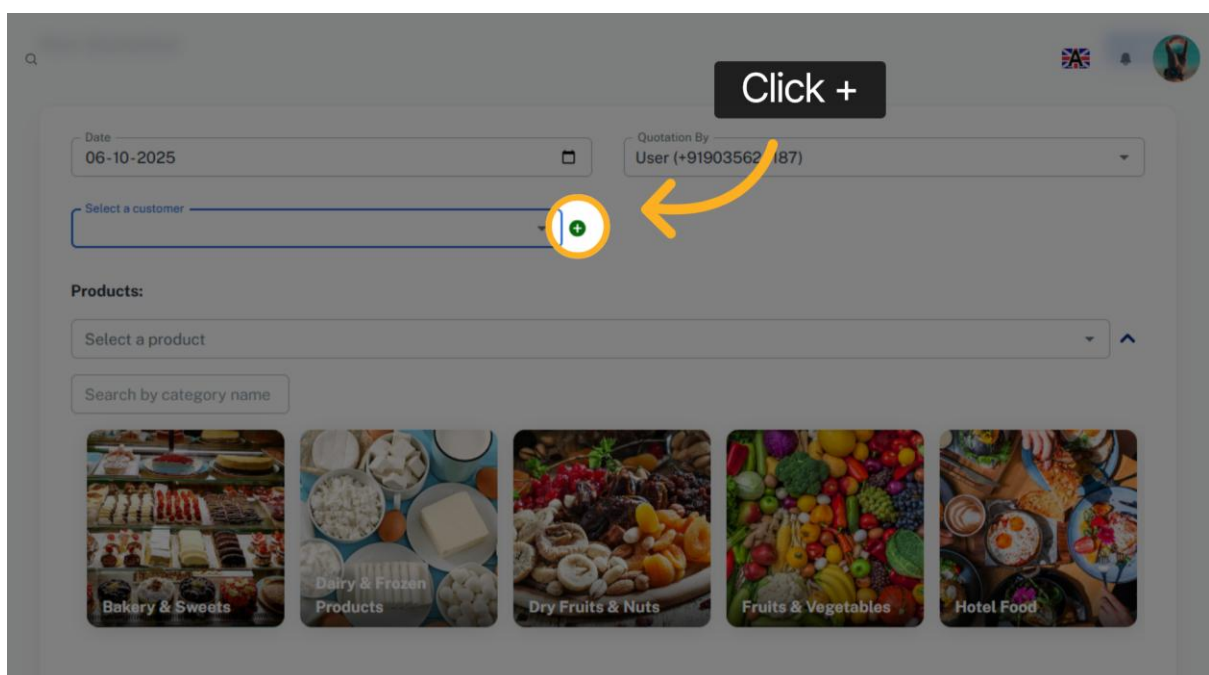
5. Select a customer

Search and select an existing customer.



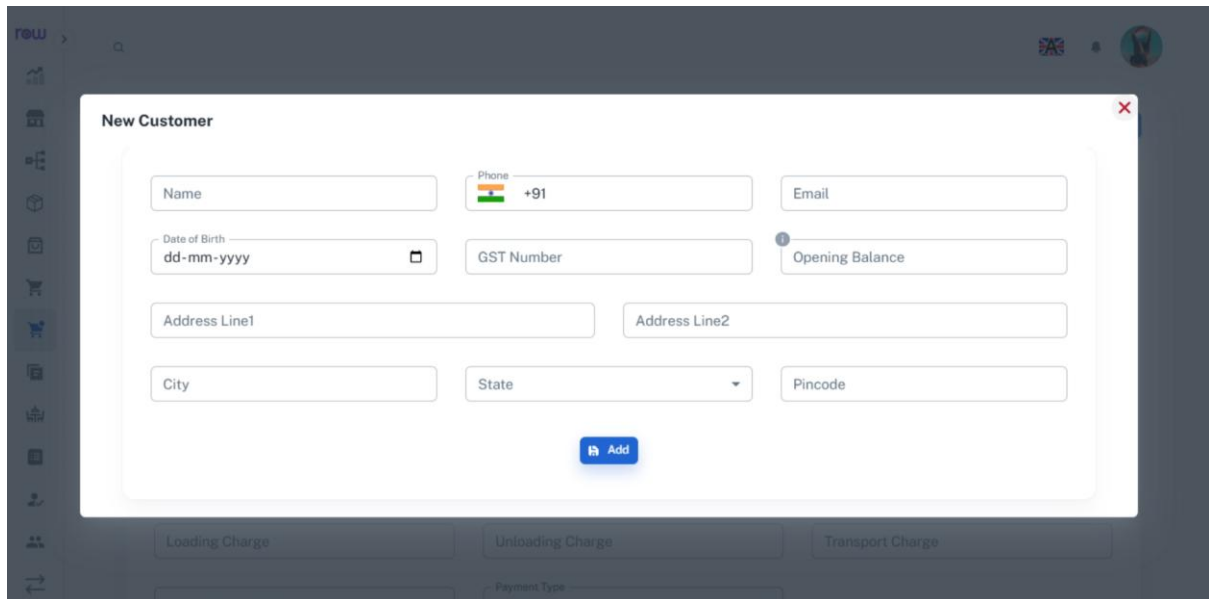
6. Create new customer

Click + icon to add a new customer



7. New Customer Page

Enter the new customer details and click Add to save and select the customer.



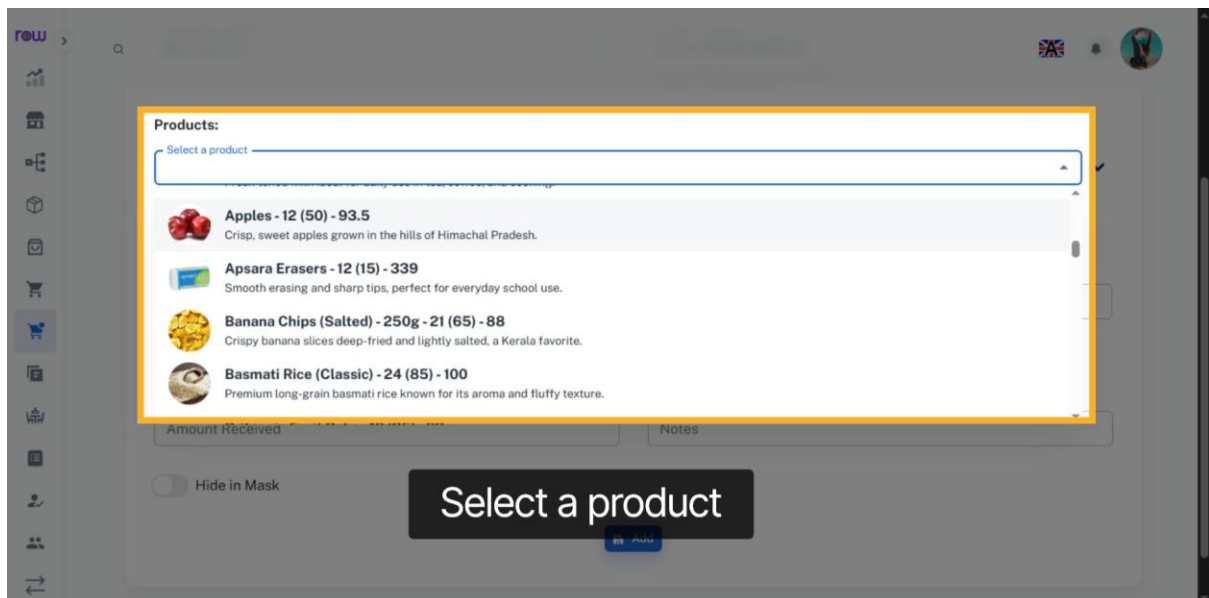
The screenshot shows the 'New Customer' form in the ROW application. The form is titled 'New Customer' and has a close button (X) in the top right corner. It contains the following fields:

- Name
- Phone (with a dropdown for country code, currently showing +91)
- Email
- Date of Birth (with a calendar icon and format dd-mm-yyyy)
- GST Number
- Opening Balance
- Address Line1
- Address Line2
- City
- State (dropdown menu)
- Pincode

At the bottom of the form is a blue button labeled 'Add'.

8. Select a product

Select a product from the dropdown. You can search by product name or code.



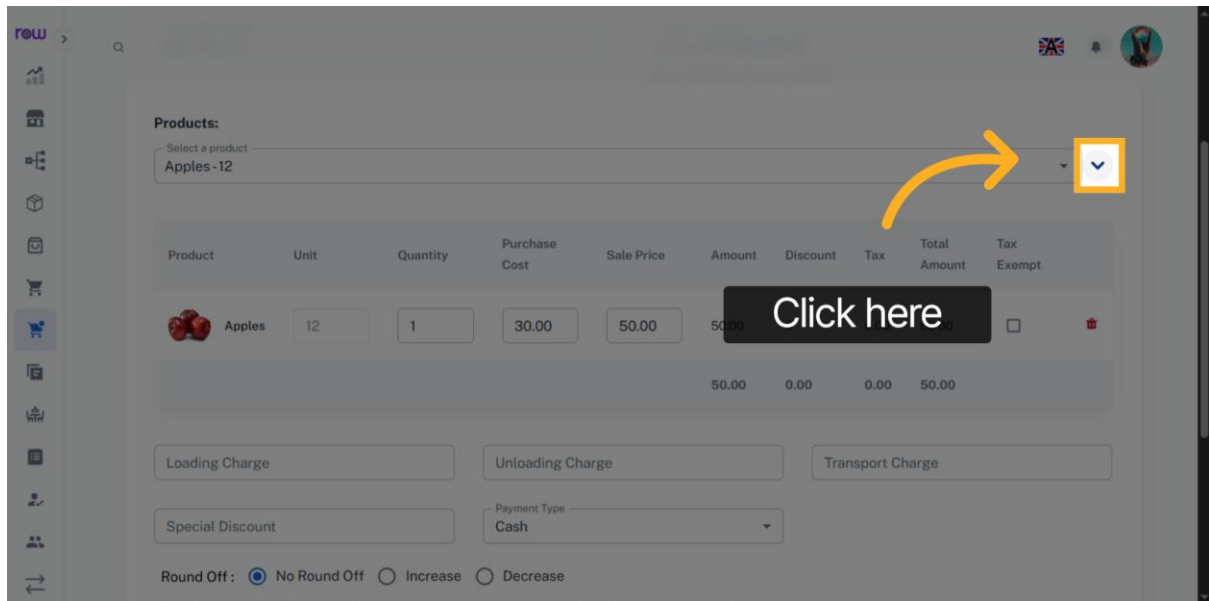
The screenshot shows the 'Select a product' dropdown menu in the ROW application. The dropdown is titled 'Products:' and has a search bar labeled 'Select a product'. Below the search bar, there is a list of products with their respective images, names, and descriptions:

- Apples - 12 (50) - 93.5**
Crisp, sweet apples grown in the hills of Himachal Pradesh.
- Apsara Erasers - 12 (15) - 339**
Smooth erasing and sharp tips, perfect for everyday school use.
- Banana Chips (Salted) - 250g - 21 (65) - 88**
Crispy banana slices deep-fried and lightly salted, a Kerala favorite.
- Basmati Rice (Classic) - 24 (85) - 100**
Premium long-grain basmati rice known for its aroma and fluffy texture.

At the bottom of the dropdown is a blue button labeled 'Add'.

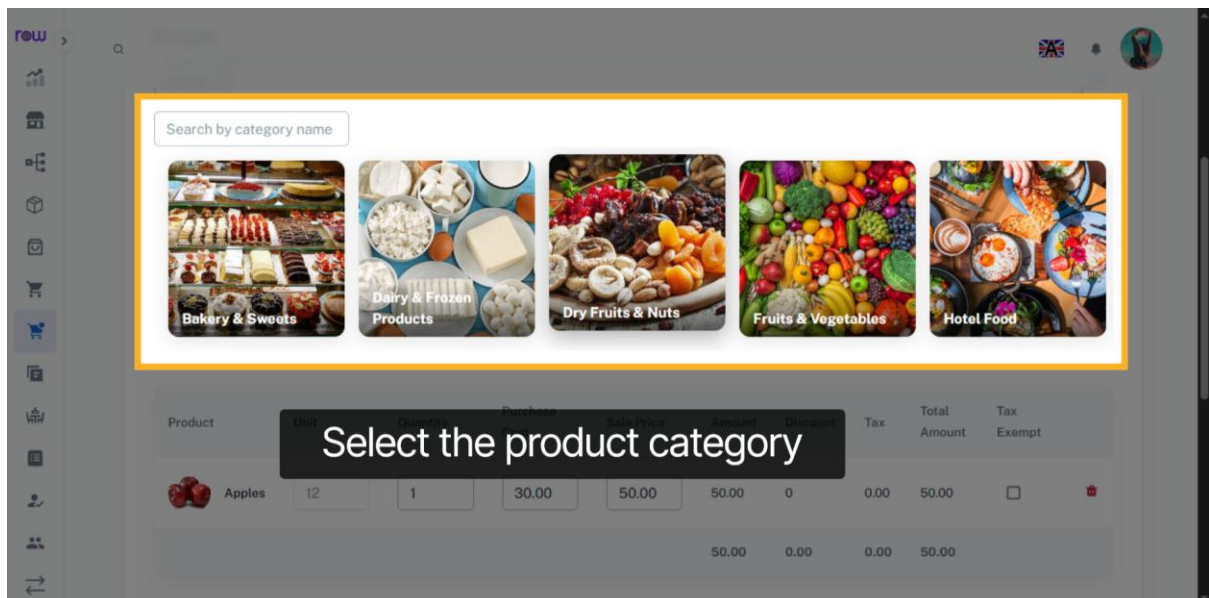
9. Product Selection Dropdown

Or click the arrow to find a product by its category.



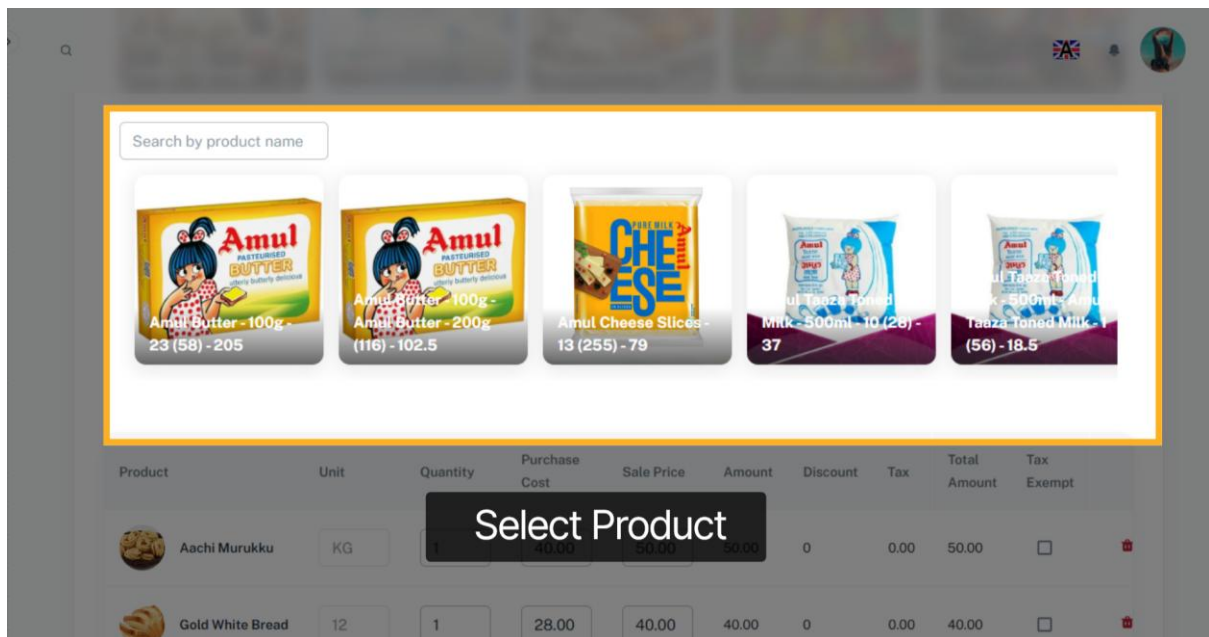
10. Select the product category

select the product by its category



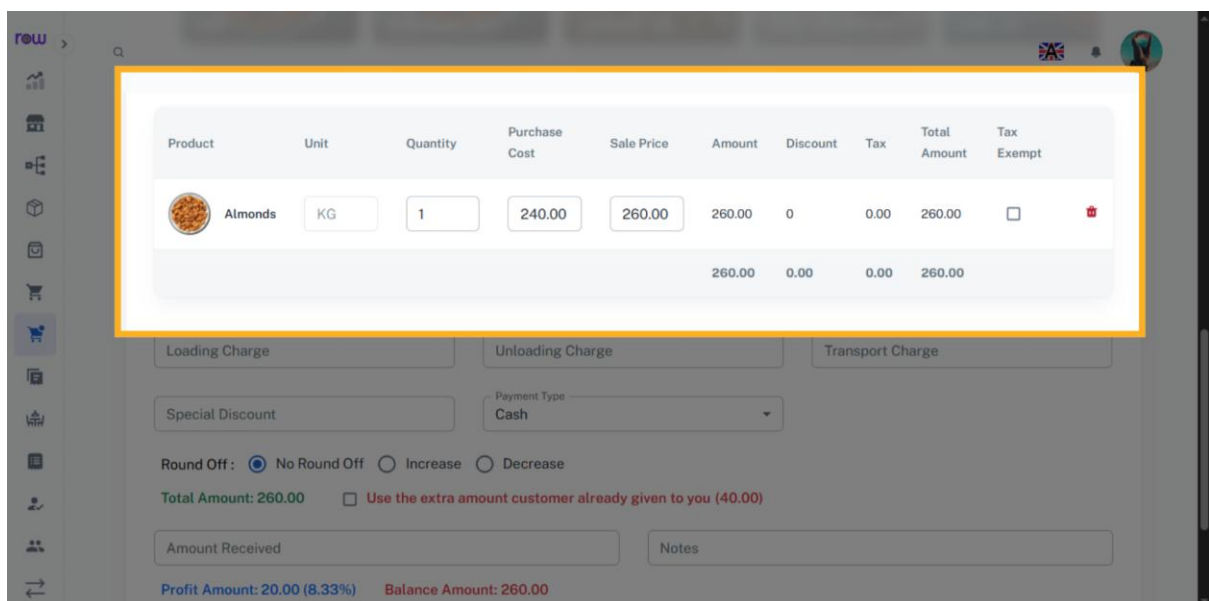
11. Select Product

Select Product



12. Selected Product List

After product selection you can update the quantity, Purchase cost and Sale price of the products.



13. Tax Exempt Checkbox

Select the checkbox to exempt the tax for a product.

The screenshot shows the 'Select Here' modal in the ROW app. A table lists products with columns: Product, Unit, Quantity, Purchase Cost, Sale Price, Amount, Discount, Tax, Total Amount, and Tax Exempt. The first row is for 'Almonds' (KG, 1, 240.00, 260.00, 260.00, 0, 0, 260.00). The 'Tax Exempt' column for Almonds has a checkbox that is highlighted with a yellow box. An orange arrow points from the 'Tax' column to this checkbox. Below the table are input fields for 'Loading Charge', 'Unloading Charge', 'Transport Charge', 'Special Discount', and 'Payment Type' (set to 'Cash'). There are also radio buttons for 'Round Off' (No Round Off, Increase, Decrease) and a checkbox for 'Use the extra amount customer already given to you (40.00)'. At the bottom, there are fields for 'Amount Received', 'Notes', and summary values: 'Profit Amount: 20.00 (8.33%)' and 'Balance Amount: 260.00'.

Product	Unit	Quantity	Purchase Cost	Sale Price	Amount	Discount	Tax	Total Amount	Tax Exempt
Almonds	KG	1	240.00	260.00	260.00	0	0	260.00	☐
					260.00	0.00	0.00	260.00	

Loading Charge: Unloading Charge: Transport Charge:

Special Discount: Payment Type: Cash

Round Off: ☒ No Round Off ☐ Increase ☐ Decrease

Total Amount: 260.00 ☐ Use the extra amount customer already given to you (40.00)

Amount Received: Notes:

Profit Amount: 20.00 (8.33%) Balance Amount: 260.00

14. Other Optional Fields

Enter loading charge, unloading charge, transport charge and Special discount if applicable.

The screenshot shows the 'No Products Found' modal in the ROW app. It features a grid of product cards at the top: 'Almonds - KG (260) - 454', 'Almonds - Almonds - 500g (520) - 227', 'Cashew W/320 - 250g - 23 (280) - 40', 'Dates (Seedless) - 500g - 23 (160) - 0', and 'Raisins - 250g - 21 (120) - 40'. Below the cards, the text 'No Products Found!' is displayed. A yellow box highlights the optional fields: 'Loading Charge', 'Unloading Charge', 'Transport Charge', 'Special Discount', and 'Payment Type' (set to 'Cash'). There are also fields for 'Amount Received', 'Notes', and a 'Hide in Mask' toggle. An 'Add' button is at the bottom.

No Products Found!

Loading Charge: Unloading Charge: Transport Charge:

Special Discount: Payment Type: Cash

Amount Received: Notes:

☐ Hide in Mask

Add

15. Round Off

If the total value has decimal points, you can round it off.

The screenshot shows the 'row' app interface. A black callout box with the text 'Select Here' has a yellow arrow pointing to the 'Round Off' section. The 'Round Off' section is highlighted with a yellow border and contains three radio button options: 'No Round Off' (selected), 'Increase', and 'Decrease'. Below this, there are fields for 'Loading Charge', 'Unloading Charge', and 'Transport Charge'. The 'Payment Type' is set to 'Cash'. The 'Amount Received' field is empty. The 'Notes' field is also empty. The 'Profit Amount' is 20.00 (8.33%) and the 'Balance Amount' is 260.00. There is a 'Hide in Mask' toggle switch and an 'Add' button at the bottom.

16. Amount Received

Enter the amount received from the customer

The screenshot shows the 'row' app interface. A black callout box with the text 'Enter Amount Received' has a yellow arrow pointing to the 'Amount Received' field. The 'Amount Received' field is highlighted with a yellow border and contains the text 'Enter Amount Received for this sale'. Above this field, there are several product cards: 'Almonds - KG (260) - 454', 'Almonds - Almonds - 500g (520) - 227', 'Cashew W320 - 250g - 23 (280) - 40', 'Dates (Seedless) - 500g - 23 (160) - 0', and 'Raisins - 250g - 21 (120) - 40'. Below the product cards, there is a 'No Products Found!' message. The 'Loading Charge' field is empty. The 'Unloading Charge' field is empty. The 'Special Discount' field is empty. The 'Payment Type' is set to 'Cash'. The 'Notes' field is empty. The 'Hide in Mask' toggle switch is off. There is an 'Add' button at the bottom.

17. Add

Click "Add" to create the Quotation

No Products Found!

Loading Charge Unloading Charge Transport Charge

Special Discount Payment Type Cash

Amount Received Enter Amount Received for this sale Notes

Hide in Mask

Click Add

Add

18. Quotations list

You will be redirected to the Quotation list screen after the Quotation is successfully created.

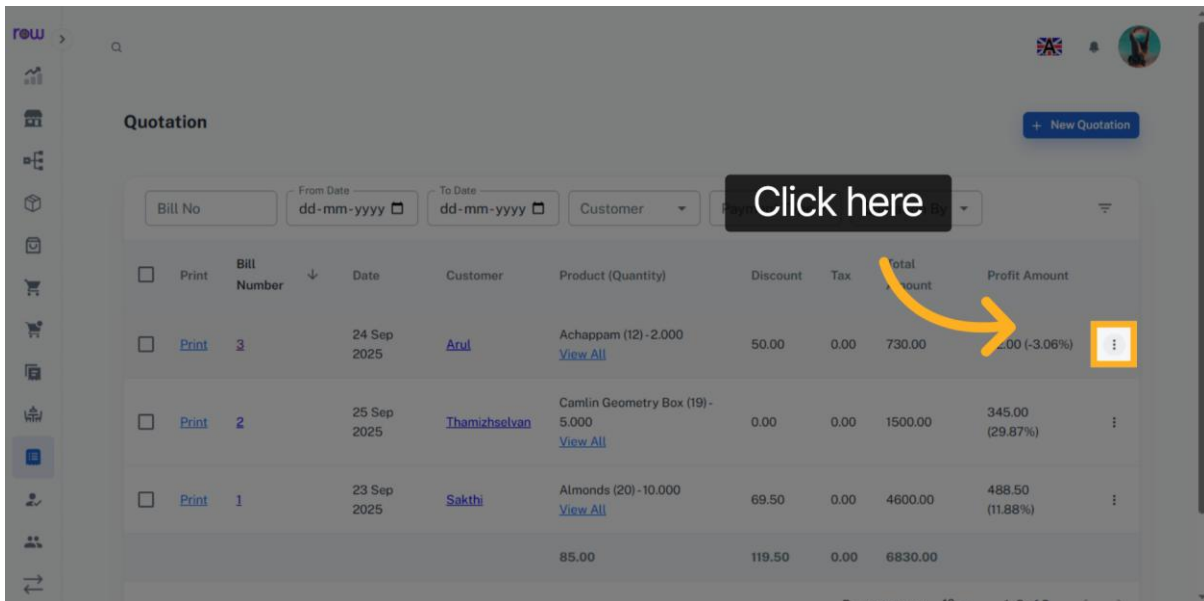
Quotation [+ New Quotation](#)

Bill No From Date dd-mm-yyyy To Date dd-mm-yyyy Customer Payment Type Quotation By

☐	Print	Bill Number	Date	Customer	Product (Quantity)	Discount	Tax	Total Amount	Profit Amount	
☐	Print	3	24 Sep 2025	Arul	Achappam (12) - 2,000 View All	50.00	0.00	730.00	-12.00 (-3.06%)	⋮
☐	Print	2	25 Sep 2025	Thamizhselvan	Camlin Geometry Box (19) - 5,000 View All	0.00	0.00	1500.00	345.00 (29.87%)	⋮
☐	Print	1	23 Sep 2025	Sakthi	Almonds (20) - 10,000 View All	69.50	0.00	4600.00	488.50 (11.88%)	⋮
						85.00	119.50	0.00	6830.00	

19. Quotation Conversion

Click here to View the list of Actions.



Quotation

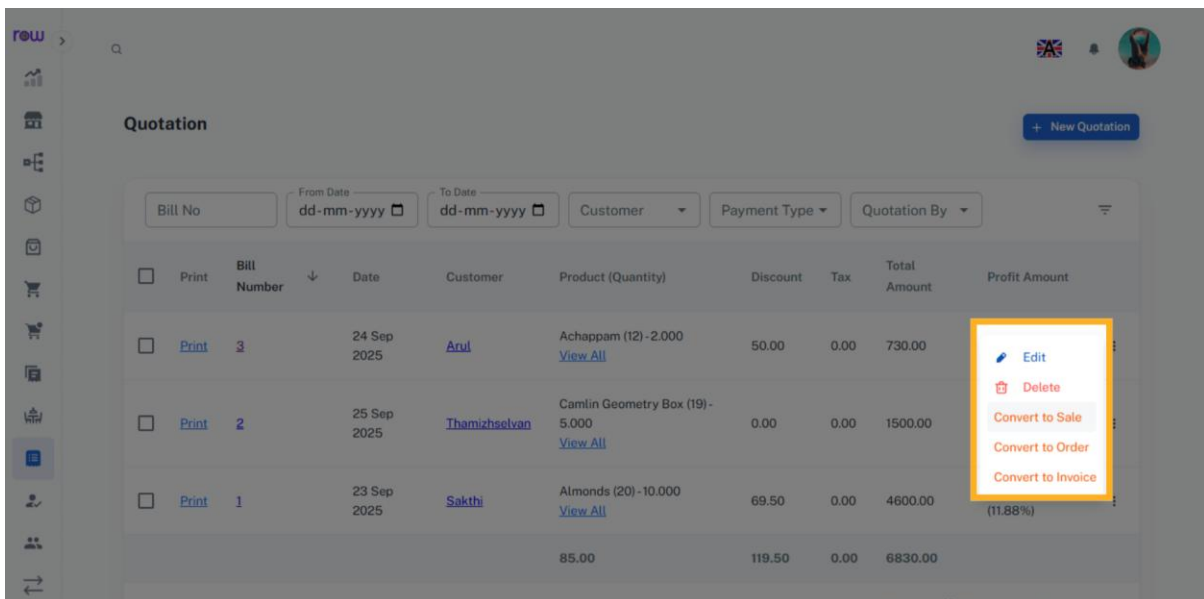
+ New Quotation

Bill No From Date dd-mm-yyyy To Date dd-mm-yyyy Customer

	Print	Bill Number	Date	Customer	Product (Quantity)	Discount	Tax	Total Amount	Profit Amount	
	Print	3	24 Sep 2025	Arul	Achappam (12) - 2.000 View All	50.00	0.00	730.00	2.00 (-3.06%)	
	Print	2	25 Sep 2025	Thamizhselvan	Camlin Geometry Box (19) - 5.000 View All	0.00	0.00	1500.00	345.00 (29.87%)	
	Print	1	23 Sep 2025	Sakthi	Almonds (20) - 10.000 View All	69.50	0.00	4600.00	488.50 (11.88%)	
					85.00	119.50	0.00	6830.00		

20. Conversion List

You can convert this quotation into a sale, order, or invoice as per your requirements.



Quotation

+ New Quotation

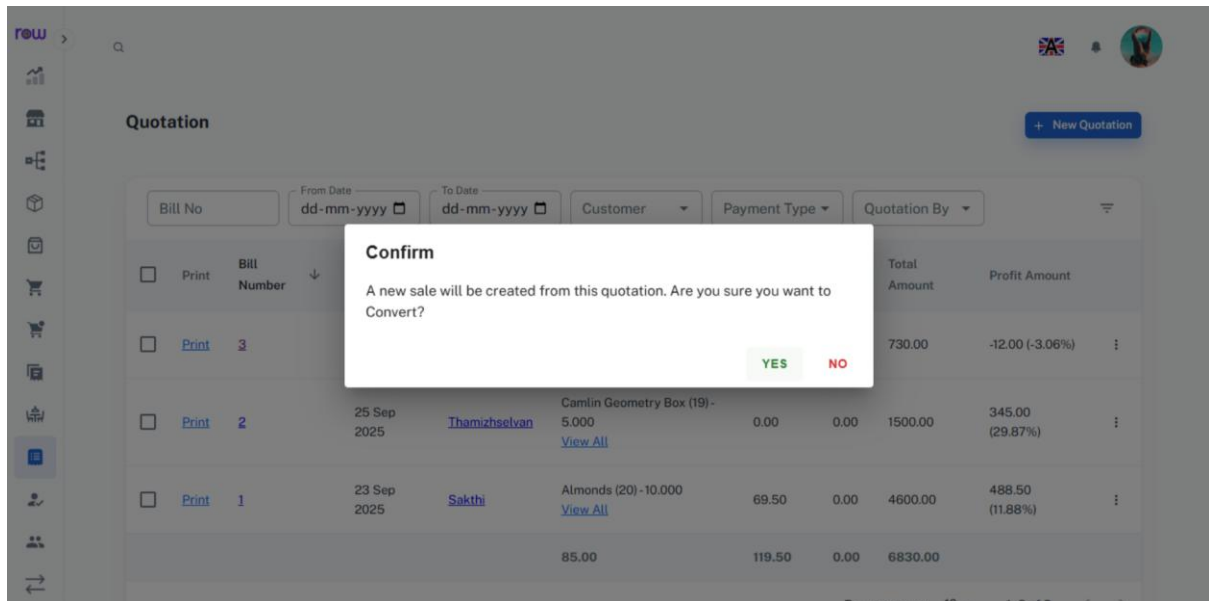
Bill No From Date dd-mm-yyyy To Date dd-mm-yyyy Customer Payment Type Quotation By

	Print	Bill Number	Date	Customer	Product (Quantity)	Discount	Tax	Total Amount	Profit Amount	
	Print	3	24 Sep 2025	Arul	Achappam (12) - 2.000 View All	50.00	0.00	730.00		
	Print	2	25 Sep 2025	Thamizhselvan	Camlin Geometry Box (19) - 5.000 View All	0.00	0.00	1500.00		
	Print	1	23 Sep 2025	Sakthi	Almonds (20) - 10.000 View All	69.50	0.00	4600.00		
					85.00	119.50	0.00	6830.00		

[Edit](#)
[Delete](#)
[Convert to Sale](#)
[Convert to Order](#)
[Convert to Invoice](#)

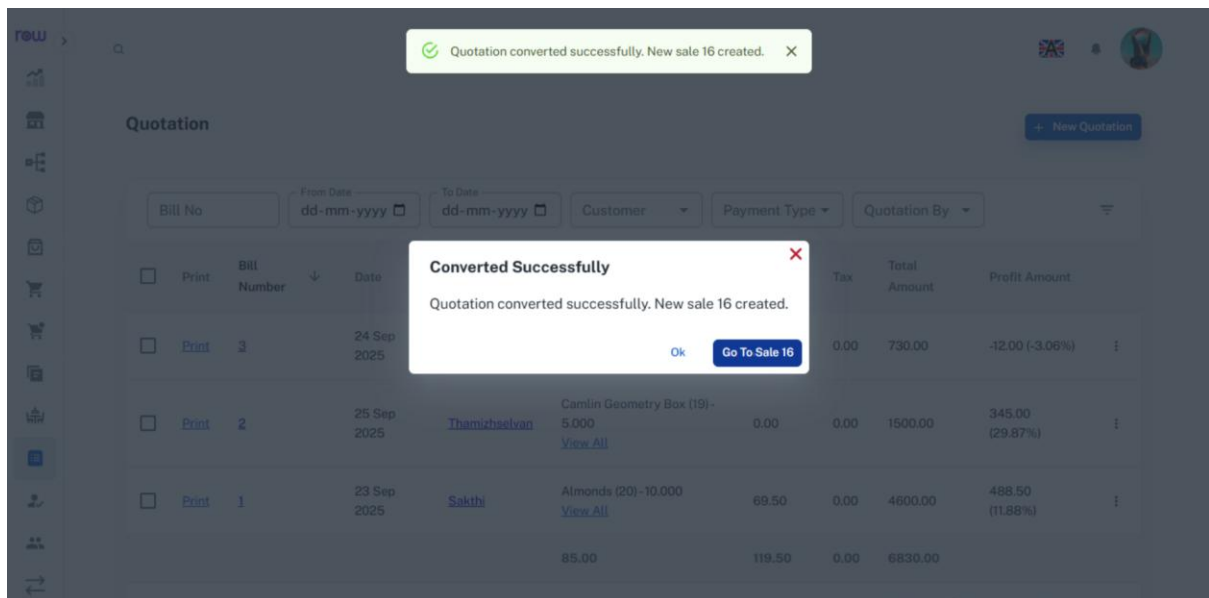
21. Approve Conversion

Click "Yes" to confirm and approve the conversion.



22. Navigation

Click "Go To" to view the details of the newly created sale, order or invoice.



23. Converted Quotation

The quotation number is displayed at the top, indicating from where it was created.

Edit Sale - 16

Created from Quotation 3

24-09-2025

Sale By: Admin (+919445612345)

Sale Type: Retail

Customer: Arul

Total Pending Amount: 6954.25

Product	Unit	Quantity	Purchase Cost	Sale Price	Amount	Discount	Tax	Total Amount	Tax Exempt
Achappam	12	2,000	76.00	85.00	170.00	0.00	0.00	170.00	No

24. Bill Number

Click the bill number to edit the quotation.

Quotation

Click Bill Number

Print	Bill Number	Date	Customer	Product (Quantity)	Discount	Tax	Total Amount	Profit Amount
☐	3	24 Sep 2025	Arul	Achappam (12) - 2,000 View All	50.00	0.00	730.00	-12.00 (-3.06%)
☐	2	25 Sep 2025	Thamizhselvan	Camlin Geometry Box (19) - 5,000 View All	0.00	0.00	1500.00	345.00 (29.87%)
☐	1	23 Sep 2025	Sakthi	Almonds (20) - 10,000 View All	69.50	0.00	4600.00	488.50 (11.88%)
				85.00	119.50	0.00	6830.00	

25. Edit Quotations

You may modify all fields except the customer. Additionally, you can add, update, or remove products during the update process.

The screenshot shows the 'Edit Quotation - 3' interface. At the top, there's a search bar and a user profile icon. The main form contains the following fields:

- Date:** 24-09-2025
- Quotation By:** Admin (+919445612345)
- Customer:** Arul
- Total Pending Amount:** 6954.25
- Products:** A dropdown menu with 'Select a product' and a search bar labeled 'Search by category name'.

Below the search bar, there are five image thumbnails representing different food categories: pastries, dairy products, meats, vegetables, and a meal plate.

26. View Conversion Summary

You can view the conversion summary of a quotation.

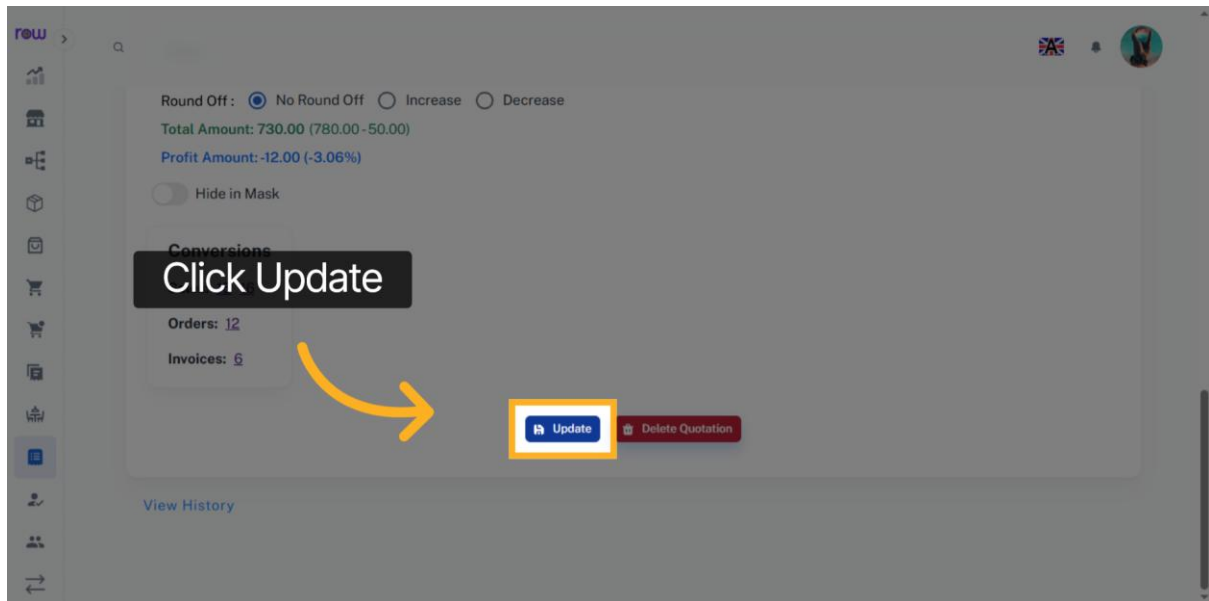
The screenshot shows the 'View Conversion Summary' interface. At the top, there's a search bar and a user profile icon. The main form contains the following fields:

- Round Off:** ☒ No Round Off ☐ Increase ☐ Decrease
- Total Amount:** 730.00 (780.00 - 50.00)
- Profit Amount:** -12.00 (-3.06%)
- Hide in Mask:** ☐
- Conversions:** A box containing the following data:
 - Sales:** 15 16
 - Orders:** 12
 - Invoices:** 6

At the bottom, there are two buttons: 'Update' and 'Delete Quotation'. A 'View History' link is also present at the bottom left.

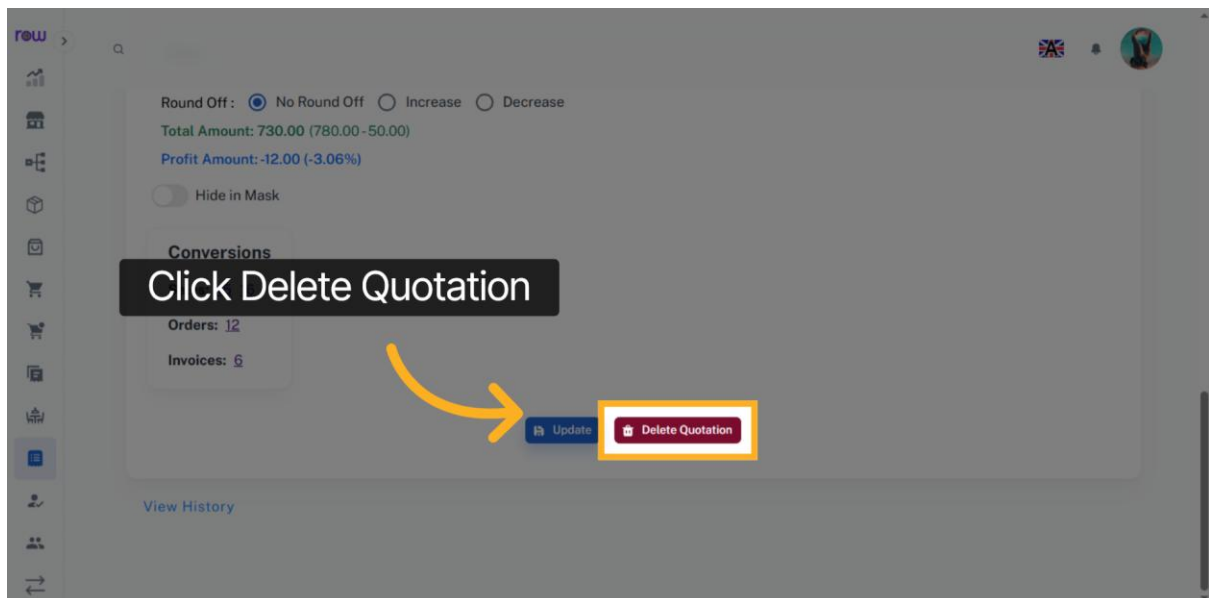
27. Update Quotations

Click Update to save the changes.



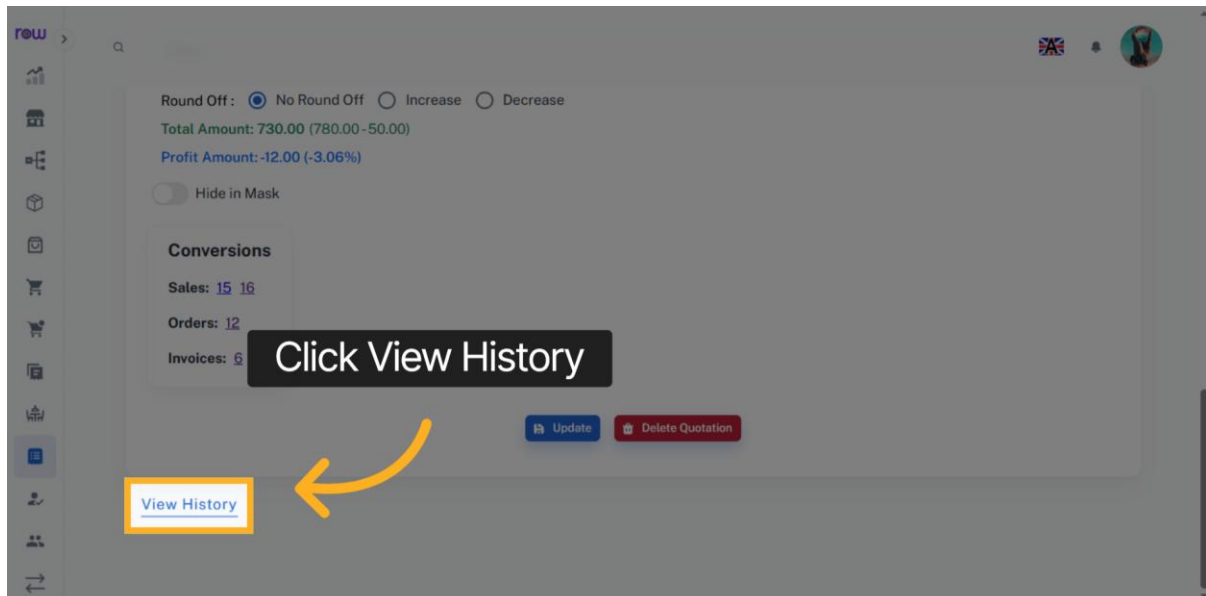
28. Delete Quotation

Click the Delete Quotation button to delete the quotation.



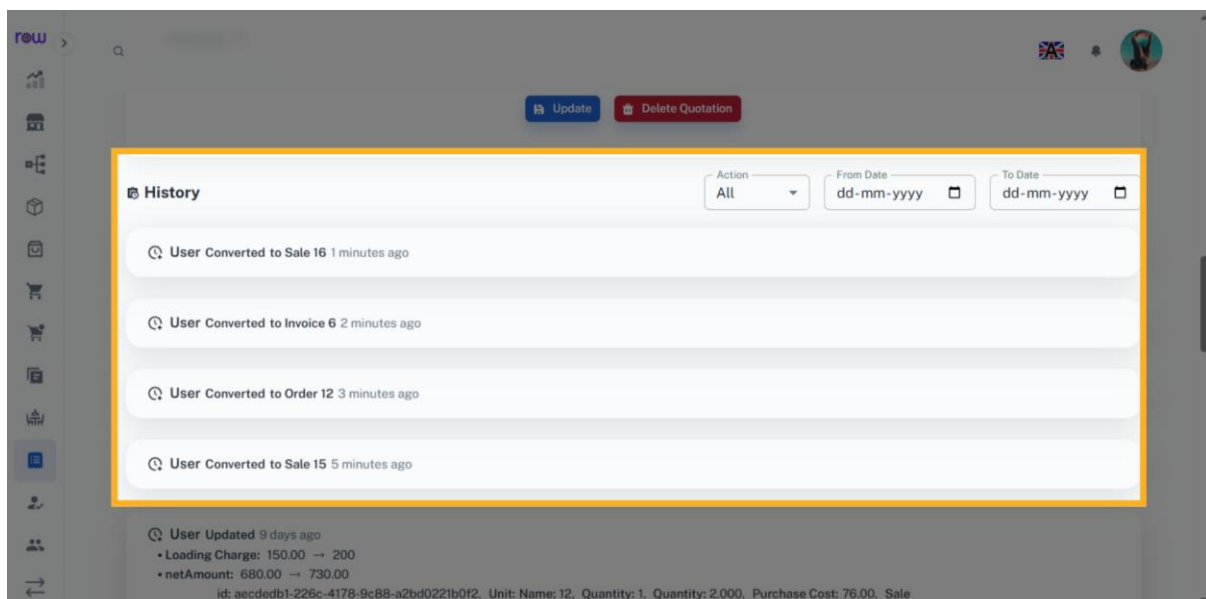
29. View History

Click the View History link to see the work history of this quotation performed by the employees.



30. History

You can see who performed which actions and when in the history.



31. Print

Click Print to generate and view, the bill.

Quotation

Bill No: [] From: [] To: [] Customer: [] Payment Type: [] Quotation By: []

Click Print

Print	Bill Number	Date	Customer	Product (Quantity)	Discount	Tax	Total Amount	Profit Amount
Print	3	24 Sep 2025	Arul	Achappam (12) - 2.000 View All	50.00	0.00	730.00	-12.00 (-3.06%)
Print	2	25 Sep 2025	Thamizhselvan	Camlin Geometry Box (19) - 5.000 View All	0.00	0.00	1500.00	345.00 (29.87%)
Print	1	23 Sep 2025	Sakthi	Almonds (20) - 10.000 View All	69.50	0.00	4600.00	488.50 (11.88%)
				85.00	119.50	0.00	6830.00	

32. Download and Print Bill

You can print and download the bill.

Orders

Bill No: [] From: [] To: [] Customer: [] Payment Type: [] Order By: []

Bill

Invoice

ABC Private Limited

Bill No: 7
Date: 02/10/2025
Bill To: Arul
+919789045678

Item Name	Quantity	Unit	Price	Amount
Almonds	1.000	KG	260.00	260.00

Sub Total: ₹260.00
Total: ₹260.00
Amount Received: 0.00
Balance Amount: 260.00
Previous Pending Amount: ₹4,404.00

Authorized Signatory

Thank You For Business

Dhargapuram, Dhargapuram, Tamil Nadu, 624637
Email: naveenca@igmail.com | Phone: +919035624187

Cancel Download Print



Thank You