

Creating Quote & Invoice Forms in MofficeCRM

Introduction

Through MofficeCRM, companies can access an easy-to-use system that helps organize a business' purchase system from quote to purchase to invoice to collection. Before utilizing this product payment system, however, you will need to create Quote and Invoice forms to use the procedures and help automate document creation.

Note that to add Quote/Invoice forms, you'll need to be a Billing/Collection team member and set it as the default CRM workgroup in your personal Settings. Then, you can access the **Customization > Quotes Order** and **Customization > Payments** sub-menus respectively.

Creating the Main Form Template

To create or modify a new Quote form, head to **Customization > Quotes Order > Quote Forms** and to create or modify a new Invoice form, head to **Customization > Payments > Invoice Forms**. We'll use the Quote forms sub-menu as a reference because the interface is essentially the same, but Quote forms have more options and are thus a little more intimidating to use. Upon clicking, you'll see a list of available Quote forms. To edit an existing form, click its name in the list. To create a new form, click the pencil icon at the top-right corner.

The screenshot shows the MofficeCRM interface for 'red ribbon cosmetics & care'. The user is 'Accounts Katherine Hong COO'. The left sidebar shows the 'Customization' menu with 'Quotes Order' selected. The main area displays the 'Quote Forms' configuration page. It includes a search bar, a table of existing forms, and a total count of 6 forms.

Quote Form Name	Enabled	Date Added
<input type="checkbox"/> Quote 04 (Light Gray)	✓	2017/01/09
<input type="checkbox"/> Quote 03 (Teal)	✓	2017/01/09
<input type="checkbox"/> Quote 02 (Cerulean)	✓	2017/01/09
<input type="checkbox"/> Quote 01 (Gray)	✓	2017/01/09
<input type="checkbox"/> Editor Only	✓	2016/03/28
<input type="checkbox"/> All-Purpose Quote Form (Single Payment)	✓	2015/10/22

Total 6

The key advantage in MofficeCRM forms is the ability to pull data from the system. Insert the various short codes below into the window. These short codes will act as variables that change with each quote. For example, the {date} short code would change into the current date the Quote was being made. Thus, the codes allow for dynamic, automated data entry that saves representatives time.

red ribbon cosmetics & care

Accounts Katherine Hong COO

Customization

LanguagesCountry / CurrencyContact SettingsRating SettingsMail Settingse-MAILActivity AlertsSelection OptionsQuotes OrderQuote SettingsQuote File AttachmentQuote FormspaymentsTax RateInvoice FormPaymentsPeriodic Payment SettingsPayment MethodPurchaseData Sync

Quote Forms

Quote Form[Product (Single Payment Form)][Product (Installment Payment Form)]Product List (Deposit Payment Form)Product List (Recurring Payments Form))One-Time Payment Discount Information

Quote Form NameQuote 03 (Teal)

Set as DefaultUsableNot Default

Quote FormQuote forms can only have a maximum width of 700px.

<table cellpadding="0" cellspacing="0" border="0" style="width: 700px;"><tbody><tr><td style="padding-top: 5px; padding-bottom: 5px; border-bottom: 5px solid #009999; font-size: 1.5em;">Quotation (name)</td><td style="padding-top: 5px; padding-bottom: 5px; border-bottom: 5px solid #009999; text-align: right;">No. {quotes_form_id}</td><td colspan="2" style="padding-top: 10px; padding-bottom: 10px; text-align: right;">Date: {date} Quote Validity: {approval_period}</td><td style="width: 60%; padding-top: 5px; padding-bottom: 5px; vertical-align: top;"><table cellpadding="0" cellspacing="0" border="0" style="width: 98%;"><tbody><tr>

Code

{name}	Quote Name	{employee}	Employee
{team}	Customer Department Name	{customers}	Customer
{approval_period}	Validity Period	{payment_conditions}	Contract and Payment Terms
{memo}	Memo	{billing_addr}	Billing Address
{ship_to_addr}	Shipping Address	{tax}	Tax(%)
{quotes_form_id}	Quote Form	{lump_sum_payment_discount}	One-Time Payment Discount Information
{date}	Date		

Team Members

{charge_name}	Name	{charge_position}	Title
{charge_telephone}	Phone	{charge_localphone}	Extension
{charge_mobile}	Mobile	{charge_fax}	Fax
{charge_email}	Email	{charge_department}	Department

[Product (Single Payment Form)]

{products_once}	[Product (Single Payment Form)]	{products_once_discount_total}	Total Discount Amount
{products_once_tax}	Total Tax	{before_tax_once_price_total}	Sub Total Before Taxes
{products_once_price_total}	Total Payment		

Besides the Quote Form tab, there are various other tabs specifically meant to format Product lists depending on the payment method.

Choose what product information should be added and how it should look. Use the line thickness, line color, item background color, and font color to customize how the product list table should look like on the Quote form. For colors, either select a default color by clicking on the swatch, or write in your own hex code in the field. For line thickness, select the pixel width. The “sample” section will dynamically change to show changes in the format.

Finally, in the “item list” section, use the plus **+** sign icons to choose which information bits to include in the Quote for the product list. Items that will be shown on the Quote will be in the gray module on the left-hand side. Use drag and drop to reorder these items. To remove an item, click the **✕** icon next to the column’s name and it will be deleted.

After finishing both the Quote form and product list tab customization options, click **save**.

The screenshot shows the 'red ribbon cosmetics & care' customization interface. The top navigation bar includes a search icon, a user profile for Katherine Hong (COO), and a 'Quote Forms' dropdown menu. The left sidebar contains a 'Customization' menu with options like Languages, Country / Currency, Contact Settings, Rating Settings, Mail Settings, e-MAIL, Activity Alerts, Selection Options, Quotes Order (selected), Payments, Purchase, and Data Sync. The main content area is titled 'Quote Forms' and features a 'Save' button in the top right. Below the title bar, there are tabs for different quote forms: 'Quote Form', '[Product (Single Payment Form)]' (selected), '[Product (Installment Payment Form)]', 'Product List (Deposit Payment Form)', 'Product List (Recurring Payments Form)', and 'One-Time Payment Discount Information'. The 'Product (Single Payment Form)' tab is active, showing customization options for Line Thickness (1 px), Line Color (#555), Item Background Color (#9fe1e7), and Font Color (#555). A 'Sample' section displays a table with columns: Product, Quantity, Length of Business Relationship, Supply Price, Total Supply Price, Total Tax, and Total Price. Below the sample table is an 'Item List' section with a list of available items to be added to the quote form. These items include Product, Quantity, Sub Total Before Taxes, Total Tax, (Price Including VAT), Product Photo, (Price Including VAT), Discount Amount, Product Information for Quote, Sub Total, and Description. Each item has a plus (+) icon to add it to the quote form. On the right side of the 'Item List' section, there is a preview of the quote form layout, showing the placement of the selected items: Product, Quantity, Sub Total Before Taxes, Total Tax, and (Price Including VAT).

red ribbon cosmetics & care

Accounts Katherine Hong COO

Customization

Quote Forms

Quote Form [Product (Single Payment Form)] [Product (Installment Payment Form)] Product List (Deposit Payment Form) Product List (Recurring Payments Form) One-Time Payment Discount Information

Line Thickness 1 px

Line Color #555

Item Background Color #9fe1e7

Font Color #555

Sample

Product	Quantity	Length of Business Relationship	Supply Price	Total Supply Price	Total Tax	Total Price

Item List

Available items

To activate click plus button. To deactivate a field and delete its settings, click remove button.

- Product
- Quantity
- Sub Total Before Taxes
- Total Tax
- (Price Including VAT)
- Product Photo
- (Price Including VAT)
- Discount Amount
- Product Information for Quote
- Sub Total
- Description

Product ✕

Quantity ✕

Sub Total Before Taxes ✕

Total Tax ✕

(Price Including VAT) ✕

Users will be able to access all enabled Quote forms when creating a new Quote. After they enter in the needed information for the Quote, they will need to save. It should appear on a Quote sub-menu list depending on its status.

Then, they can click the quote name and click the **Q Preview** button to see how the Quote may look to Customers via email or for printing.

red ribbon cosmetics & care

Quotes in Progress

Order

Purchase Orders

Quotes

Expired Quotes

Quotes on Hold

Successful Quotes

Quotes in Progress

Sales

Quote Name

Customer

Employee

Opportunity

Quote Form

Customer Department Name

Status

Sent Date

Validity Period

Billing Address

United Kingdom

Zip Code

-- State --

-- City --

Address

Save

Preview / Send Quote

Quotation Winter Sale

No. {quotes_form_id}

Date: 2017/01/10 | Quote Validity: 2017/01/11 – 2017/02/10

ABCD Copr of America

525 S. Lexiton Ave
Burlington NC 12345

We are pleased to provide the following quotation:

Notes Quotes are valid for 30 days.

Srya Atark

[35235] GB City of London City of London
111

TEL :

Person :

E-mail :

Total Amount \$ 9,550

Signature

Product	Quantity	Sub Total	VAT	Unit Price
Doll Perfect Hydrating Foundation	200	\$ 5,454	\$ 545	\$ 30
Doll Perfect Shadow Palette	100	\$ 2,182	\$ 218	\$ 24
Doll Perfect Invisible Concealer	50	\$ 1,046	\$ 105	\$ 23

Sub Total	\$ 8,682
Discount	\$ 0
VAT	\$ 869
Grand Total	\$ 9,550

Terms

Contract terms are as follows.

Close