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2.04.01 Offer

The **offer** mask realizes the offer preparation for a selected project or subproject. An offer can only be created for external projects. This mask contains the information about the offer amount, the creator of the offer, the offer date and the corresponding offer items.

The mask consists of the following elements:

Master Sheet

Bezeichnung	Anzahl	Angebotswert	Kostenart	Bemerkung
1 Arbeitspaket 045.1-1 Installation Basissystem	04:00	644,36 EUR	Projektkosten	
2 Arbeitspaket 045.1-2 Konzeptgespräche	24:00	2.880,00 EUR	Projektkosten	
3 Arbeitspaket 045.1-3 Pflichtenheft erstellen	40:00	6.443,60 EUR	Projektkosten	
4 Arbeitspaket 045.2-1 Konfiguration	12:00	1.200,00 EUR	Projektkosten	
5 Arbeitspaket 045.2-2 Customizing	10:00	3.500,00 EUR	Projektkosten	

- **Basic Information:**

- **Description:** This numeric field assigns the quotation header a unique identification number which is automatically proposed by the system.
- **Status:** This field is determined by the system and indicates the status of the quotation based on the actions performed using the Action function. When a new offer is created, it automatically receives the status “No offer”, when the offer is transferred, it receives the status “Offer accepted” and after cancellation, it receives the status “Offer cancelled”.
- **Project:** In this field the project is selected for which a quotation is to be created. Projects can be defined and changed in the Project mask. An offer can only be created for an external project.
- **Net Amount:** In this field, the net amount of the offer items is automatically entered by the system.
- **Sales Taxes:** In this field, the sales tax valid for this offer is entered from the selection menu. By default, this field defaults to the tax rate valid in the country assigned in the Configuration screen. The VAT can be defined and modified in the sales tax mask.
- **Gross:** In this field, the system automatically enters the gross amount of the quotation

items.

- **Offer Creator:** In this field, the person who created the offer is automatically preassigned by the system.
 - **Date:** This field indicates the date of the offer creation. The system defaults to the current date.
 - **Valid Until:** The validity date of the quotation is entered in this field.
 - **Comment:** This field can be used for comments on the offer.
- **Description:**
 - **Cover Letter:** In this field, a short description of the offer can be used.
 - **Items:** This element contains a list of all assigned quotation items.

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- **In General:**
 - **Heading:** This field can be used for description of the offer.
 - **Responsible Employee:** This field shows which employee is responsible for the offer.
 - **Sales Presentation:** This field displays the presentation of the sales department.
 - **Maintenance Costs:** This field shows the costs of the order.
- **Licenses and Agreements:**
 - **Licenses:** This field contains the agreement.
 - **Update Costs:** This field displays the new added costs.
 - **Data Transfer:** In this field you can agree on a data transfer.
 - **Payment Agreement:** This field displays which payment agreement has been concluded.
- **Daily Rates:**
 - **Daily Rates Workshop:** Hier werden die Kosten des Workshops angezeigt.
 - **Daily Rates Coaching:** In diesem Feld werden die Kosten des Coaching angezeigt.
 - **Daily Rates Project Management:** Dieses Feld zeigt die Projektkosten an.
 - **Daily Rates Development:** Hier werden die Kosten des Entwicklung angezeigt.
 - **Daily Rates Support:** Dieses Feld zeigt die Kosten des Support an.
 - **Other Regarding Consulting:** Dieses Feld kann für weitere Beratung genutzt werden.
 - **Other Development/Support Costs:** Here you can see other development/support costs.
 - **Other Regarding Travel Expenses:** This field can be used to enter further travel expenses.
- **Targets and Agreements:**
 - **Goals:** The goals of the project are entered here.
 - **Services:** This field shows the services.
 - **Preliminary Remark:** In this field you can enter remarks.
 - **Chargeable Adjustments:** In this field the chargeable adjustments can be planned.

Amendments/Variable Offers

Angebot CS-16-01-2

Stammblatt (Open)Projectile Änderungsanträge / variable Angebote Sonstiges

Vereinbarungen

Liefertermin

Einleitung

Definition

Mitwirkungspflicht

Zeitraumen

Spezifikationen

Spezifikation I

Spezifikation II

- **Agreements:**

- **Delivery Date:** This field shows when the finished work will be delivered.
- **Introduction:** This field shows the introduction.
- **Definition:** This field describes the offer.
- **Cooperation Obligation:** This field shows the cooperation obligation.
- **Time Frame:** A time frame is defined here.

- **Specifications:**

- **Specification I/II:** This field displays the specifications.

Miscellaneous

Angebot CS-19-10-01

Stammblatt (Open)Projectile Änderungsanträge / variable Angebote Sonstiges

Format

Gruppierungsoption Nicht gruppiert

Ausgabeformat DOCX

technische Einstellungen & Details

int. Nr. 12

Originalangebot

Bankverbindung d. eigenen

Firma

Kurs 1,000000

Rabatt %

- **Format:**

- **Grouping Options:** In this selection field you can define the grouping of the offer according to the following (Grouping by employee, activity, subproject, task, task and employee, task and employee list, not grouped and summary row top project.
- **Output Format:** This field is used to format the output.

- **Technical Settings & Details**

- **int. Number:** In this field, the number (INT) of the quotation is automatically stored by the system.
- **Original Offer:** This document link may link to the old “cancelled” offer if the action “Create new offer from cancellation” was used.
- **Own Company Bank Details:** The bank details of your own company are documented here.
- **Exchange Rate:** In this field the exchange rate to the local currency is defined. The exchange rate is preassigned by the system and can be changed if necessary.
- **Discount:** This field is used as a default if a discount item is to be created. The discount can be stored in the customer (document category sales activity), is then inherited by the customer's projects and is transferred when the invoice is issued.

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