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2.04.01 Offer Header



The **offer header** 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:

General Data



- **Basic Information:**

- **Number:** 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".
- **Company:** This field shows the company to which the offer was made.
- **Contact Person:** This field shows the contact person of the company.
- **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.
- **Service Period (From/To):** 
- **Net Amount:** In this field, the net amount of the offer items is automatically entered by the system.
- **VAT:** 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 Amount:** In this field, the system automatically enters the gross amount of the quotation items.
- **Created By:** In this field, the person who created the offer is automatically preassigned by the system.
- **Date of Creation:** This field indicates the date of the offer creation. The system defaults to the current date.
- **Vat Amount:** 
- **Offer Valid Until:** The validity date of the quotation is entered in this field.
- **Note:** 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.

- **Positions:** This element contains a list of all assigned quotation positions.

Misc



- **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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