

# 4.1.1.1.Main Tab

On this tab, provide the general details of the quotation, including the entity, customer, contract, and contact person.

Company, Contract, and Entity are mandatory fields.

The screenshot shows the 'Main' tab of a quotation system. At the top, there are navigation tabs: 'Main', 'Approvals', 'Accepted Quotations', 'History of Approval', 'History of Object Status Changes', and 'Taken Decisions'. Below these are action buttons: 'Post and close' (highlighted in yellow), 'Save', 'Post', 'Edit', 'Dr Cr', 'Generate', 'Print', 'Settings', 'More actions', and a help icon. The status 'Accepted by Client on 5/6/2025' is shown with a 'Cancel Acceptance' link. The main form area has sub-tabs: 'Main', 'Inventory', 'Services (4)', and 'Additional Information'. The 'Main' sub-tab contains the following fields: 'Company' (Yakub Trading L.L.C), 'Number' (MEQTN25-QT00001), 'From' (5/ 6/2025 3:06:13 AM), 'Contract' (Main Contract), 'Entity' (MRB Engineering and Contracting), 'Contact Person' (empty), 'Basis' (Project Estimates MEPE25-00000001 dated 5/4/2025 8:05), and 'Project' (Interior of the Villa). A 'Comment' text area is located below the project field. At the bottom, there is a summary section with 'In work (changed 5/6/2025)', 'Posted' status, 'Administrator' user, and financial fields: 'Discount: 0.00 %', 'VAT: 2,840.25 AED', and 'Total Due: 59,645.25 AED'.

**Company** – Select a customer (an individual or legal entity) from the Companies list for whom the quotation is being created.

**Contract** – Automatically populated with the default contract of the selected company. You can choose another contract or create a new one if needed.

**Contact Person** – Select the person from the customer side who is responsible for the potential deal.

**Number** – If set to <Auto>The number is assigned automatically when the document is saved. Can be manually edited if needed.

**Entity** – Select the legal entity responsible for the sale. This field is visible if Multi-Company Accounting is enabled in settings.

**Basis** – Select the project estimate or other source document that serves as the basis for this quotation.

**Project** – Allows linking the quotation to a project. If needed, the Project field can be shown as a column on the Inventory or Services tab using the Settings button.

**Comment** – Optional field for entering additional information related to the quotation.