



Quotes in Almendro: how to create, send and turn them into invoices

Step-by-step guide with screenshots of Almendro Electronic Invoicing (fe.almendro.cr): the wizard, the email and page your client receives, real-time follow-up, conversion into an invoice and the sales report.

In short: build the quote in the same wizard you invoice with, send it by email, and your client opens it online with a PIN to accept or decline it with comments. You see in real time when they opened it and what they answered, and an accepted quote turns into an invoice with everything prefilled. A quote is not an electronic invoice: it does not go to Hacienda and has no tax validity.

1. How it works

A quote goes through six steps, and at each one you know where it stands:

1. Create	2. Send	3. Open	4. Reply	5. Convert	6. Invoice
Client, catalog items, validity and terms.	COT number, email with PDF and PIN.	The client opens it with the PIN: you see it.	Accepts or declines, with notes.	Prefilled invoice draft.	Issue it and it stays linked.

Status	What it means
Sent	The email went out; the client has not opened it yet.
Viewed by the client	The client opened it with the PIN.
Accepted / Declined	The client replied, or you marked it manually.
Converted	It already has an invoice draft.
Invoiced	The invoice was issued and accepted by Hacienda.
Expired / Cancelled	Its validity ran out without a reply, or you cancelled it.

2. Who can quote and how many

Topic	Rule
Create and send	Any user in your account who can issue invoices.
Settings and cancelling	Only the owner and administrators.
Password required	Converting, cancelling and marking accepted or declined manually ask for your password, and they stay in the timeline under your name.
Unsent	You can keep as many unsent quotes at once as your plan's monthly invoice limit.
Plan usage	Sending a quote counts against your plan like an invoice. The invoice created from it counts separately. Resending does not count again. Invoices and quotes draw from the same pool, and the list shows it: "This month you have used 4 of 2 000 from your plan's pool".

3. Set your defaults

- 1 In the menu, under **Operations**, click **Quotes**.
- 2 Click **Settings**, top right.
- 3 Choose the **PDF title** (Quote or Pro forma invoice), the **validity** in days, whether they are **calendar or business days**, and write your **default terms**. Click **Save**.

The screenshot displays the Almendro application interface. On the left is a dark sidebar menu with the Almendro logo at the top. The menu is organized into sections: 'OVERVIEW' (Home, Reports, My downloads), 'OPERATIONS' (Vouchers, Drafts, Quotes, Clients, Items, Received, Other deductibles), 'MANAGEMENT' (My integrators, PDF templates, Webhooks, Branches), and 'ADMINISTRATION' (Logout). The 'Quotes' option under 'OPERATIONS' is highlighted. On the right, a 'Quote settings' dialog box is open. It contains a close button (X) in the top right corner. Below the title, there is a descriptive text: 'What is preloaded when you create a quote. Whatever you choose when sending one also becomes the default.' The settings are as follows: 'PDF TITLE' is set to 'Quote'; 'VALIDITY (DAYS)' is set to '15'; 'DAY TYPE' is set to 'Calendar days'; and 'Default terms' is a text area containing 'Payment terms, delivery time, warranty'. At the bottom right of the dialog are 'Cancel' and 'Save' buttons.

Quote settings

What is preloaded when you create a quote. Whatever you choose when sending one also becomes the default.

PDF TITLE

Quote

VALIDITY (DAYS)

15

DAY TYPE

Calendar days

Default terms

Payment terms, delivery time, warranty

Cancel Save

Business days skip weekends and holidays, and validity counts from the moment you send it (90 days at most). Whatever you choose when sending a quote also becomes the default for the next one.

4. Create the quote: the client

- 1 In Quotes click + **New quote**. The same invoicing wizard opens, in four steps.
- 2 Choose the **currency** and the **client**: saved, looked up by ID number or entered manually. Check their emails: that is where the quote will go.
- 3 Click **Next**. The draft saves itself: you can leave and continue later.

« Back

New quote

1 Receiver

2 Lines

3 Payment

4 Review and send

Currency and exchange rate

CURRENCY

CRC | Colón costarricense

Pick the currency upfront to see all amounts in it. You can readjust it in the Payment step.

Recipient

Saved client

Search by ID

Enter manually

Ejemplo S.A. Saved client

Cancel

CONTACT (EDITABLE)

EMAILS

compras@ejemplo.cr

Phone and address (optional) ▾

Summary

Sales

1 300 000,00 CRC

Discount

- 0,00 CRC

Tax

169 000,00 CRC

Total

1 469 000,00 CRC

✔ Saved to Drafts

You can exit and continue later; it stays in Drafts.

« Back

Save and exit

Next »

5. The lines

- 1 Search for and click the items in your **Items** catalog: every line carries its CABYS code, price and tax.
- 2 If an item is missing, click **+ Create item**: it is registered and added to the quote. For a one-off item you do not want to keep in the catalog, use **+ Manual line**, with its CABYS code and tax: it goes to the invoice the same way.
- 3 Adjust quantities, prices and discounts. The summary on the right adds up live.

« Back

New quote

1 Receiver

2 Lines

3 Payment

4 Review and send

Lines

Search item by name

+ Manual line Import from Excel + Create item

#3 Capacitación del equipo (por hora) 35 000,00

#1 Desarrollo de sitio web corporativo 850 000,00

#2 Hospedaje y mantenimiento anual 240 000,00

Per page 10 « 1 / 1 »

DESCRIPTION	QUANTITY	UNIT PRICE	SUBTOTAL
#1 Desarrollo de sitio web corporativo	1	850000	850 000,00 CRC
Discount ▾			

DESCRIPTION	QUANTITY	UNIT PRICE	SUBTOTAL
#2 Hospedaje y mantenimiento anual	1	240000	240 000,00 CRC
Discount ▾			

DESCRIPTION	QUANTITY	UNIT PRICE	SUBTOTAL
#3 Capacitación del equipo (por hora)	6	35000	210 000,00 CRC
Discount ▾			

Summary

Sales	1 300 000,00 CRC
Discount	- 0,00 CRC
Tax	169 000,00 CRC
Total	1 469 000,00 CRC

✔ Saved to Drafts

You can exit and continue later; it stays in Drafts.

Many lines at once: import from Excel

- 1 Click **Import from Excel** and then **Download template**.
- 2 Fill in the «Líneas» sheet with one row per line: CABYS, description, unit, quantity, unit price, VAT rate and an optional discount. The «Ayuda» sheet has an example and the valid codes.
- 3 Drag the file onto the box or tap it to choose it. Almendro checks every row: if any has an error, it tells you which one to fix and adds none; if everything is right, click **Add**.

It takes up to 100 lines per file and 2 files per quote, and works the same way on invoices.

Import lines from Excel

Download the template, fill it in with one row per line and upload it. Every row is checked before it is added: if any has an error, we tell you which one to fix and none is added.

Files imported into this document: 0 of 2. Up to 100 lines per file.

1. Download the template

Download template

2. Upload the filled-in template

✓

lineas-demo.xlsx

Tap to choose another file.

4 lines ready to add, for 1 460 000,00 CRC before taxes.

Diseño del sitio web Institucional	1 × 650 000,00 CRC
Integración con el sistema de inventario	1 × 420 000,00 CRC
Licencia anual de la plataforma, por usuario	5 × 48 000,00 CRC
Capacitación en el uso de la plataforma (por hora)	6 × 25 000,00 CRC

CancelAdd 4 lines

6. Payment and conditions

- 1 Set the **sale condition** and the **payment method**, as in an invoice.
- 2 Under **Quote validity and terms** confirm the validity, day type and title. Write the **terms** the client will see (delivery time, payment, warranty).
- 3 **Internal notes** are for your team: they are not printed on the PDF.
- 4 In **Notes** write anything else the client should read: what the offer does not include, payment details or the execution time. Terms and notes are printed on the PDF with their paragraphs and carry over to the invoice when you convert it.

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New quote

1 Receiver

2 Lines

3 Payment

4 Review and send

Currency and exchange rate

CURRENCY

CRC | Colón costarricense

Payment

SALE CONDITION

Cash

PAYMENT METHOD

Transfer / deposit

Quote validity and terms

VALIDITY (DAYS)

15

DAY TYPE

Calendar days

PDF TITLE

Quote

Business days skip weekends and holidays. Validity counts from the moment you send it.

Terms and conditions

Delivery: 30 calendar days after acceptance.
Payment: 50% on acceptance and 50% on delivery.
Warranty: 3 months on programming defects.

Internal notes

Client referred by the Chamber of Tourism.

Other charges (optional)

No other charges.

+ Add charge

Notes

They appear on the quote PDF and carry over to the invoice when you convert it, together with the terms. For example: what is not included, payment details or the execution time.

The client provides the website texts and photographs.
Hosting renews every year and is invoiced separately.

Summary

Sales1 300 000,00 CRC

Discount- 0,00 CRC

Tax169 000,00 CRC

Total1 469 000,00 CRC

✔ Saved to Drafts

You can exit and continue later; it stays in Drafts.

« Back

Save and exit

Next »

7. Review and send

1 Review the page. If something is off, go back with **Back**.

- In **Send to** leave it empty to use the client's emails, or type others separated by commas.
- In **Message for the customer** you can write the greeting that goes in the body of the email, for example an introduction to your company. Click **Send quote** and it gets its number, for example **COT-2026-000003**.

Back

New quote

Receiver

Lines

Payment

Review and send

Review & Issue

Letter (8.5x11")

- 100% +

COTIZACIÓN

Se asignará al recibir #0763066

Válida por 15 días naturales

almendro

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Almendro Tech

Contacto: 22000001

San José, San José | Car la Rotonda de La Hispanidad, 200 metros este, s.n.c.

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almendrotech.cr / tecnologia@almendrotech.cr

Emisor

Número:

Identificación:

Ubicación:

Dirección:

Teléfono:

Correo:

Actividad:

Nombre:

Identificación:

Nombre com.:

Ubicación:

Dirección:

Carrero:

Condición de venta:

Contado

Moneda:

CRC

Detalle

#	CABEYES	Cant.	Unid.	Descripción	R. Unit.	Imp.	Total
1	021420000000	1,000	Sp	Desarrollo de sitio web corporativo	\$05,000.00	110,000.00	\$60,000.00
2	021210000000	1,000	Sp	Mantenimiento y actualización anual	210,000.00	33,000.00	\$71,000.00
3	021010000000	0.000	Hr	Capacitación del equipo (por hora)	\$5,000.00	27,000.00	\$27,000.00
Total Venta:						1,300,000.00	
Total Venta Netas:						1,300,000.00	
Total Impuestos:						169,000.00	
TOTAL (CRC):						1,469,000.00	

Medios de Pago

Transferencia / Depósito bancario

Observaciones

The client provides the website texts and photographs.
Hosting renewals every year and is invoiced separately.

Terminos y condiciones

Delivery: 30 calendar days after acceptance.
Payment: 50% on acceptance and 50% on delivery.
Warranty: 3 months on programming defects.

Almendro Tech | Gracias por su preferencia

Documento sin validar fiscal. No se es comprobante electrónico ni sustituye a la factura.
Precio sujeto a la emisión del comprobante.

Hcho en Costa Rica por Almdro

Approximate preview: final PDF may vary slightly

Send to

Empty; the customer's emails

You can type other emails separated by commas. The customer gets the PDF and a PIN to accept or reject it online.

Message for the customer (optional)

Good morning: here is the website quote we talked about. We look forward to your comments.

< Back

Save and exit

Send quote

A sent quote cannot be edited. To change something, use **Duplicate**: you get a new draft with the same content and, when sent, a new number.

8. What your client receives

An email with your brand, the total, the validity, the PDF attached and a **6-digit PIN** to open it online. Client replies reach you: the email replies to your address.

Almendro Tech

Cédula Jurídica: 3101000001

Cotización COT-2026-000004

Estimado(a) Ejemplo S.A., le enviamos la cotización que nos solicitó. Encontrará el detalle en el PDF adjunto.

Total

CRC 1 469 000,00

Válida hasta

17/10/2026

Para aceptarla o rechazarla, y dejarnos sus comentarios, ábrala en línea con este PIN:

105504

Ver y responder la cotización

Este documento no tiene validez fiscal: no es un comprobante electrónico ni sustituye a la factura. El PIN es personal; no lo comparta.

Cotización enviada con

Almendro Factura Electrónica

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fe.almendro.cr LinkedIn Instagram WhatsApp

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Tecnología Almendro S.A.

Almendro Tech

Cédula Jurídica: 3101000001

San José, San José | De la Rotonda de La Hispanidad, 200 metros este, e...

+506 22000001

facturacion@almendrotech.cr, contabilidad@almendrotech.cr

COTIZACIÓN

Factura proforma

COT-2026-000004

02/10/2026

Válida hasta 17/10/2026 (15 días naturales)

Emisor

Nombre: Tecnología Almendro S.A.

Identificación: Cédula Jurídica 3101000001

Ubicación: San José, San José, Carmen

De la Rotonda de La Hispanidad, 200 metros este, edificio Torre Almendro, piso 3

Dirección: metros este, edificio Torre Almendro, piso 3

Teléfono: +506 22000001

Correo: facturacion@almendrotech.cr, contabilidad@almendrotech.cr

Cliente

Nombre: Ejemplo S.A.

Identificación: Cédula Jurídica 3101123456

Ubicación: Ejemplo

San José, San José, Carmen

Dirección: Avenida Central, edificio Ejemplo

Correo: compras@ejemplo.cr

Condición de venta: Contado

Moneda: CRC

Detalle

#	CABYS	Cant.	Ud.	Descripción	P. Unit.	Imp.	Total
1	8314200000000	1.000	Sp	Desarrollo de sitio web corporativo	859,000.00	119,500.00	969,500.00
2	8315100000000	1.000	Sp	Hospedaje y mantenimiento anual	240,000.00	31,200.00	271,200.00
3	9291900000000	6.000	h	Capacitación del equipo (por hora)	35,000.00	27,300.00	237,300.00
Total Venta:						1,300,000.00	
Total Venta Neta:						1,300,000.00	
Total Impuesto:						169,000.00	
TOTAL (CRC):						1,469,000.00	

Medios de Pago

Transferencia / Depósito bancario

Términos y condiciones

Prices in colones, VAT included in the total.

Website delivered within 4 weeks of approval.

Payment: 50% on approval and 50% on delivery.

Almendro Tech | Gracias por su preferencia

Documento sin validez fiscal. No es un comprobante electrónico ni sustituye a la factura.

Precios sujetos a la emisión del comprobante.

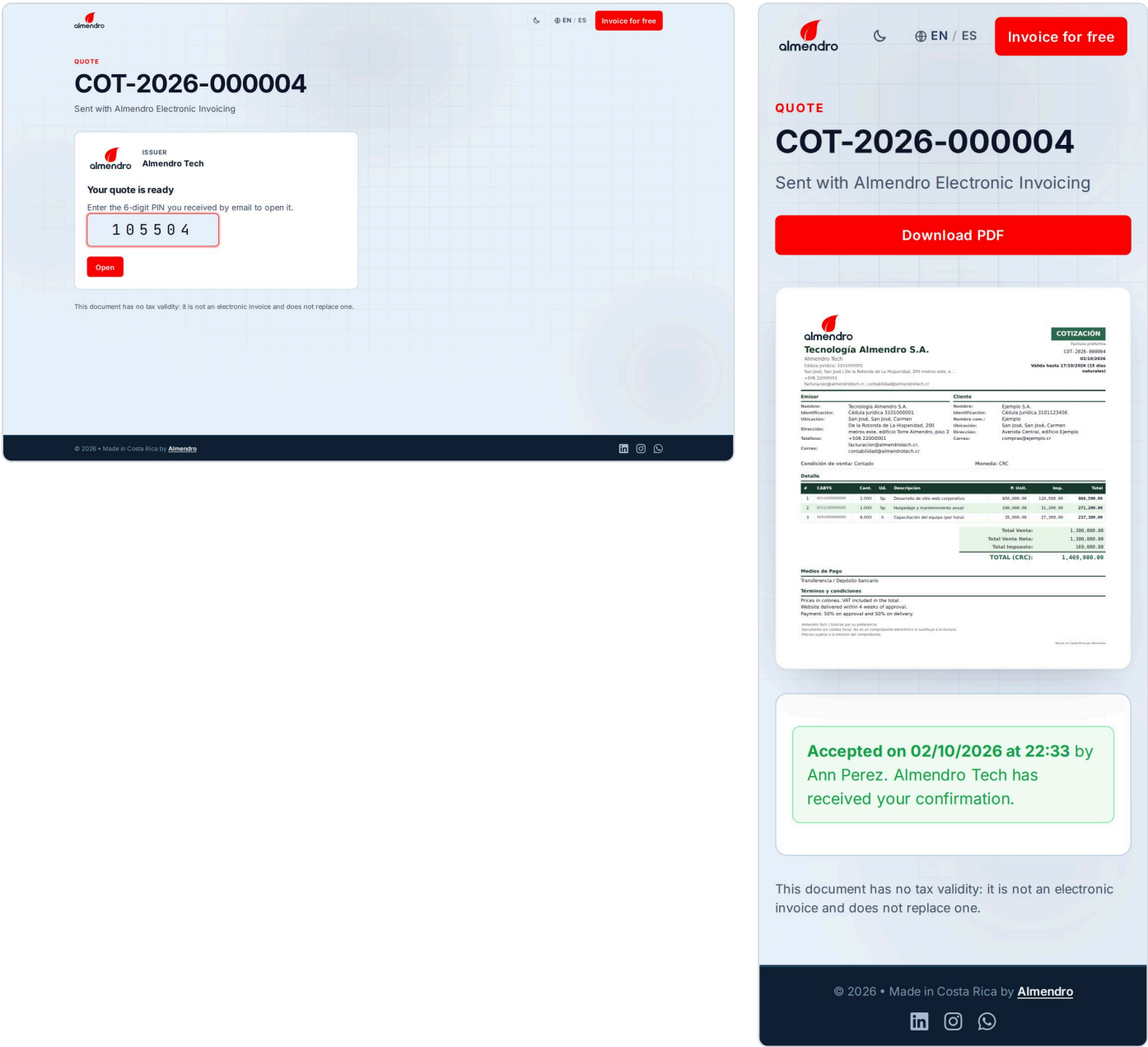
Hecho en Costa Rica por Almendro

No tax validity. The email, the PDF and the page all say it: the document has no tax validity, is not an electronic invoice and does not replace one. The PDF and the email to the client are always in Spanish, like the rest of the Costa Rican tax documents.

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9. The quote page

The email button takes the client to the quote page. They enter the PIN and see the same page as the PDF, with your logo, and can download it. It works the same on a phone.



Security	How it works
PIN	It is only in the email to the client. You do not see it in the portal.
Attempts	After 5 wrong PINs the page locks. Resending it creates a new PIN and the old one stops working.
Session	Once opened, the page closes by itself after 15 minutes without use.
Language	The page follows the client's browser language, Spanish or English.

10. The client replies

Below the page, the client types their name and, if they wish, comments: conditions, changes or why they decline. They can reply only once.

almendro

QUOTE

COT-2026-000004

Sent with Almendro Electronic Invoicing

EN / ES

Invoice for free

Download PDF

almendro

Tecnología Almendro S.A.

Almendro Tech

Cédula Jurídica: 3101000001

San José, San José | De la Rotonda de La Hispanidad, 200 metros este, e...

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facturacion@almendrotech.cr, contabilidad@almendrotech.cr

COTIZACIÓN

Factura preliminar

COT-2026-000004

02/10/2026

Válida hasta 17/10/2026 (15 días naturales)

Emisor

Nombre: Tecnología Almendro S.A.

Identificación: Cédula Jurídica 3101000001

Ubicación: San José, San José, Carmen

Dirección: De la Rotonda de La Hispanidad, 200 metros este, edificio Torre Almendro, piso 3

Teléfono: +506 22000001

Correo: facturacion@almendrotech.cr, contabilidad@almendrotech.cr

Cliente

Nombre: Ejemplo S.A.

Identificación: Cédula Jurídica 3101123456

Nombre com.: Ejemplo

Ubicación: San José, San José, Carmen

Dirección: Avenida Central, edificio Ejemplo

Correo: compras@ejemplo.cr

Condición de venta: Contado

Moneda: CRC

Detalle

#	CARYS	Cant.	Ud.	Descripción	P. Unit.	Imp.	Total
1	824000000000	1,000	Sp	Desarrollo de sitio web corporativo	859,000.00	118,500.00	965,500.00
2	811100000000	1,000	Sp	Hospedaje y mantenimiento anual	240,000.00	31,200.00	271,200.00
3	929100000000	6,000	H	Capacitación del equipo (por hora)	35,000.00	27,300.00	227,300.00
Total Venta:						1,306,000.00	
Total Venta Netas:						1,306,000.00	
Total Impuesto:						169,000.00	
TOTAL (CRC):						1,469,000.00	

Medios de Pago

Transferencia / Depósito bancario

Terminos y condiciones

Prices in colones, VAT included in the total.

Website delivered within 4 weeks of approval.

Payment: 50% on approval and 50% on delivery.

Almendro Tech | Gracias por su preferencia

Documento sin validez fiscal. No es un comprobante electrónico ni sustituye a la factura.

Prezioses suppone a la emisión del comprobante.

Hecho en Costa Rica por Almendro

What do you think?

Your reply reaches Almendro Tech with your comments. You can only reply once.

Your name

Comments (optional)

Conditions, changes you need, anything you want to tell us

Accept

Decline

This document has no tax validity: it is not an electronic invoice and does not replace one.

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in

What do you think?

Your reply reaches Almendro Tech with your comments. You can only reply once.

Your name

Ann Perez

Comments (optional)

Approved. Please start on Monday and schedule the training with HR.

Accept

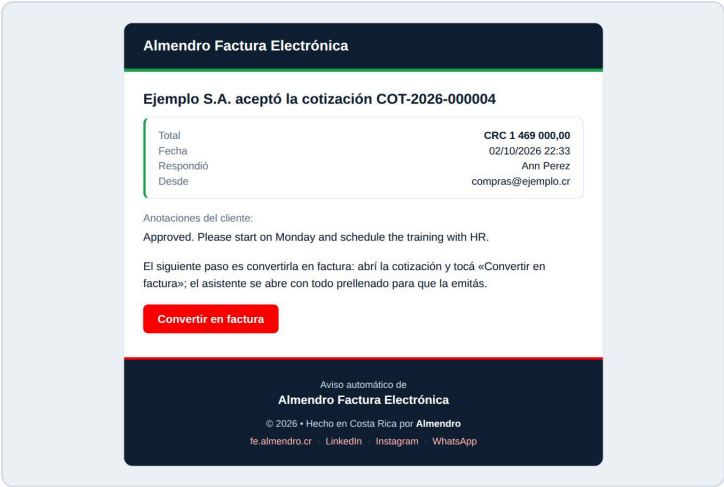
Decline

Accepted on 02/10/2026 at 22:33 by Ann Perez. Almendro Tech has received your confirmation.

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11. Real-time follow-up

As soon as the client replies, you get an email with their notes and a button to convert it. In the quote detail you see the whole timeline: who created it, who it was sent to, when the client opened it and what they answered.



In the detail	What it is for
Follow-up	Set a date and that day you get an email reminder.
Notes	Write down what you discussed with the client; it stays in the timeline under your name.
Resend	While there is no reply, to the same or other emails, with a new PIN.
Mark manually	If the client answered by phone, mark it accepted or declined.
Expiry	If validity runs out without a reply, it expires by itself. We warn you before it does.

The quote timeline

Every step is recorded with its user and time: whoever quotes is not always whoever invoices. Green dots are favorable steps; red only a rejection or an error.

« Quotes

QUOTE
COT-2026-000004

ACCEPTED

Download PDF

Convert to invoice

Duplicate

Total
1 469 000,00 CRC

A sent quote cannot be changed. To change something, duplicate it: a new one with its own number is created.

Customer

Ejemplo S.A.

3101123456

Sent to compras@ejemplo.cr

Date
Valid until

02/10/2026
17/10/2026 (15 calendar days)

Customer reply

Accepted on 02/10/2026

Replied by Ann Perez from compras@ejemplo.cr

Approved. Please start on Monday and schedule the training with HR.

Follow-up

dd/mm/aaaa

You get an email reminder that day.

Detail

Detail	Quantity	Price	Total
Desarrollo de sitio web corporativo	1	850 000,00 CRC	960 500,00 CRC
Hospedaje y mantenimiento anual	1	240 000,00 CRC	271 200,00 CRC
Capacitación del equipo (por hora)	6	35 000,00 CRC	237 300,00 CRC
		Sales	1 300 000,00 CRC
		Tax	169 000,00 CRC
		Total	1 469 000,00 CRC

Terms and conditions.

Prices in colones, VAT included in the total.

Website delivered within 4 weeks of approval.

Payment: 50% on approval and 50% on delivery.

History

Created by Carlos Rodríguez

02/10/2026, 10:32 p. m.

Sent by Carlos Rodríguez to compras@ejemplo.cr

02/10/2026, 10:32 p. m.

The customer opened it

02/10/2026, 10:33 p. m.

Accepted by the customer (Ann Perez, compras@ejemplo.cr)

Approved. Please start on Monday and schedule the training with HR.

02/10/2026, 10:33 p. m.

Write down what you discussed with the customer

Add note

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[in](#) [ig](#) [wh](#)

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12. Turn the accepted quote into an invoice

- 1 On the accepted quote click **Convert to invoice** and confirm with your password.
- 2 The wizard opens with an invoice already built: the client, currency and lines are those the client accepted and cannot be changed. The quote's notes and terms carry over to the invoice notes, where you can adjust them. Review the payment and click **Issue**.
- 3 If you leave with **Save and exit**, you will find it in **Drafts**, with the **Origin** column showing which quote it came from.

Convert into an invoice

COT-2026-000004. An invoice draft is created with the quote data. The quote is marked as converted.

YOUR PASSWORD

Status changes are confirmed with your password.

Cancel

Convert to invoice

« Back

Issue voucher

1 Type & recipient

2 Lines

3 Payment

4 Review & issue

Invoice from quote COT-2026-000004

Customer, currency and lines are the ones the customer accepted and cannot be changed. Adjust the payment, review and issue.

Issue as

BRANCH / BOX

Casa Matriz - Caja 1

001

00001

Recipient

Ejemplo S.A. Saved client

CONTACT (EDITABLE)

EMAILS

compras@ejemplo.cr

RECIPIENT ECONOMIC ACTIVITY

6810.0 - Actividades inmobiliarias con bienes propios o arrendados

Summary

Sales 1 300 000,00 CRC

Discount - 0,00 CRC

Tax 169 000,00 CRC

Total 1 469 000,00 CRC

✔ Saved to Drafts

You can exit and continue later; it stays in Drafts.

Drafts

Vouchers in progress, not issued yet. Edit and issue them when ready.

+ New voucher

You have 3 of 2000 voucher drafts and 0 of 2000 quotes to send.

TYPE	CLIENT	ORIGIN	LINES	TOTAL	UPDATED		
01 Electronic invoice	Ejemplo S.A.	Quote COT-2026-000004	3	1 469 000,00 CRC	02/10/2026, 10:33 p. m.	Issue	Delete
01 Electronic invoice	Ejemplo S.A.	Quote COT-2026-000003	3	1 469 000,00 CRC	02/10/2026, 10:31 p. m.	Issue	Delete
01 Electronic invoice	Ejemplo S.A.	Quote COT-2026-000002	3	1 469 000,00 CRC	02/10/2026, 10:28 p. m.	Issue	Delete

If you delete that draft, the quote goes back to "Accepted" and you can convert it again. When Hacienda accepts the invoice, the quote becomes "Invoiced" with its number; if Hacienda rejects it, the timeline tells you and you can convert again.

13. The quotes list

Below the **New quote** button you see how much of your plan's pool you have used in the period: what you issue, what you receive and the quotes you send all draw from the same pool. The list shows the period's quoted amount, sent, awaiting reply, accepted, invoiced and acceptance rate at the top, with filters by status, dates and search.

Quotes

⚙️ Settings

Your quotes and their follow-up: the ones still in progress, the ones sent and what the client replied.

+ New quote

This month you have used 4 of 2 000 from your plan's pool: what you issue, what you receive and the quotes you send all draw from the same pool.

Quoted

5 876 000,00 CRC

Sent

4

Awaiting reply

1

Accepted

3

Invoiced

0

Acceptance rate

75 %

Days to accept

Same day

Search by number, customer or ID

STATUS

All statuses

From

To

01/10/2026

31/10/2026

Clear filters

Download the period report:

Excel

PDF

NUMBER	CUSTOMER	DATE	VALID UNTIL	TOTAL	STATUS	INVOICE	ACTIONS
COT-2026-000004	Ejemplo S.A.	02/10/2026	17/10/2026	1 469 000,00 CRC	CONVERTED		⬇
COT-2026-000003	Ejemplo S.A.	02/10/2026	17/10/2026	1 469 000,00 CRC	CONVERTED		⬇
COT-2026-000002	Ejemplo S.A.	02/10/2026	17/10/2026	1 469 000,00 CRC	CONVERTED		⬇

14. The sales report

In **Reports > Quotes** you have the sales funnel: how much you quoted, to whom, how much you won, how much you lost and why (the client's notes), how much is awaiting reply and how much is pending conversion or in draft. Download it as Excel or PDF, complete or by status.

« Reports

Quotes

How much was quoted, to whom, how much was won, how much was lost and why. Measured by the sending date; amounts are in colones.

From

To

01/10/2026

31/10/2026

Prepare Excel

Prepare PDF

My downloads

The download includes every status in the period.

SENT

4

5 876 000,00 CRC

AWAITING REPLY

1

1 469 000,00 CRC

WON

3

4 407 000,00 CRC

CONVERSION RATE

75%

won over sent

TO CONVERT

0

0,00 CRC

IN DRAFT

3

4 407 000,00 CRC

INVOICED

0

0,00 CRC

LOST

0

0,00 CRC

DAYS TO ACCEPT

0

Period funnel

Counts every status in the period even when the list is filtered. Pick a stage to see its quotes.

STATUS	COUNT	AMOUNT	SHARE
Sent	1	1 469 000,00 CRC	25.0%
Viewed by customer	0	0,00 CRC	0.0%
Accepted	0	0,00 CRC	0.0%
Converted	3	4 407 000,00 CRC	75.0%
Invoiced	0	0,00 CRC	0.0%
Rejected	0	0,00 CRC	0.0%
Expired	0	0,00 CRC	0.0%
Cancelled	0	0,00 CRC	0.0%
Total	4	5 876 000,00 CRC	100%

By client

Who was quoted and what they answered, largest amount first.

CLIENT	SENT	WON	LOST	CONVERSION	AMOUNT	DAYS
Ejemplo S.A. 3101123456	4	3	0	75.0%	5 876 000,00 CRC	0

Quotes

Each quote with the client's reply and notes: why it was won or lost.

STATUS

All statuses

NUMBER	SENT	CLIENT	TOTAL	STATUS	REPLY	NOTES	INVOICE
COT-2026-000004	02/10/2026	Ejemplo S.A. 3101123456	1 469 000,00 CRC	CONVERTED	Ann Perez, 02/10/2026	Approved. Please start on Monday and schedule the training with HR.	-
COT-2026-000003	02/10/2026	Ejemplo S.A. 3101123456	1 469 000,00 CRC	CONVERTED	Ana Pérez, 02/10/2026	Aprobado. Por favor arrancar el lunes y coordinar la capacitación con Recursos Humanos.	-
COT-2026-000002	02/10/2026	Ejemplo S.A. 3101123456	1 469 000,00 CRC	CONVERTED	Ana Pérez, 02/10/2026	Aprobado. Por favor arrancar el lunes y coordinar la capacitación con Recursos Humanos.	-
COT-2026-000001	02/10/2026	Ejemplo S.A. 3101123456	1 469 000,00 CRC	SENT		-	-

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15. Frequently asked questions

Question	Answer
Does the quote go to Hacienda?	No. Only the invoice you issue afterwards.
Can I change a sent quote?	No. Duplicate it: a new one comes out with its own number.
The client cannot find the PIN	Resend it: they get a new email with another PIN.
They accepted by phone	Use Mark accepted, with your password.
Can I quote in dollars?	Yes, choose the currency in the first step. The invoice uses the same currency.
Can I quote something that is not in my catalog?	Yes, with + Manual line or by importing your lines from Excel. Each line carries its CABYS code and tax and goes to the invoice the same way.
Where do I see what I sold with quotes?	In Reports > Quotes.
