

Quotation Management and Control Software

Professional Quotation, Customer PO Control, Change Management & Reporting System

One controlled workflow. Clear history. Strong management reporting.

Quotation Draft → Issue → Amendment / Enhancement / Additional Quotation / Cancellation → Customer PO → Customer PO Changes → Reports

Quotation Management Pro Tool - DRAFT R0

Quotation Entry | Customer PO Entry | Customer PO Changes | Reports | Item Group | Item Entry | Quotation Print | Settings | Customer Master | Quotation Amendment / Revision | Commercial Masters

Currency: Tax method for other charges: Round off Y/N: Discount type:

Customer Name: QT-IMP-0005 Live Quotation Total (Est.):

Quotation Prefix: Quotation Number: Last Saved Quotation Number:

Quotation Date: Quotation Valid Thru:

Item Name	Qty	Rate	Discount	Tax %	Amount
A4 Zerox Paper	1000	500		18	

Item Name: Box

Qty: Rate:

Tax %:

Discount:

Total Amount:

Freight:

Insurance:

Other Charges:

Round Off:

Exit Draft

Load Existing Quotation:

Edit Draft Item Delete Draft Item

Load Quotation Issue Draft Save Draft Item

Import Details (Optional)

Port of Loading: Type of Import:

Port of Discharge:

Initial Quotation Draft

Select Existing Draft Quotation

Save Draft Load Draft Draft Print Cancel Draft

Clear EXIT Company: Demo Company Pvt Ltd GST No.: 24AAAAA2222A1Z2

Quotation Entry — draft preparation, item grid, lifecycle and issue controls.

Controlled Quotation Lifecycle

Draft, Issue, Amendment, Enhancement, Additional Quotation and terminal Cancellation with preserved history.

Customer PO Changes

Track post-PO Amendment, Enhancement and Cancellation with effective quantity and commercial impact.

Professional Quotation Print

Draft, revision and CANCELLED versions with locations, tax registration, commercial terms and signature options.

Customer PO Control

Record one or multiple Customer POs against the correct Customer and Quotation with quantity/rate visibility.

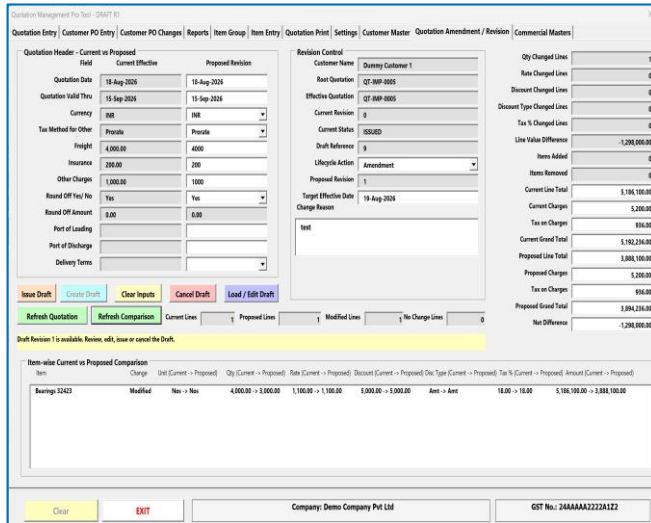
Reporting Suite

22 management outputs across pending, reconciliation, exceptions, registers, masters, audit and history.

Central Access Backend

Single-PC use or protected shared LAN deployment; each additional LAN computer uses a separately activated LAN Client.

1. Complete Quotation Lifecycle — without overwriting history



Quotation Amendment / Revision



Issued Amendment Quotation

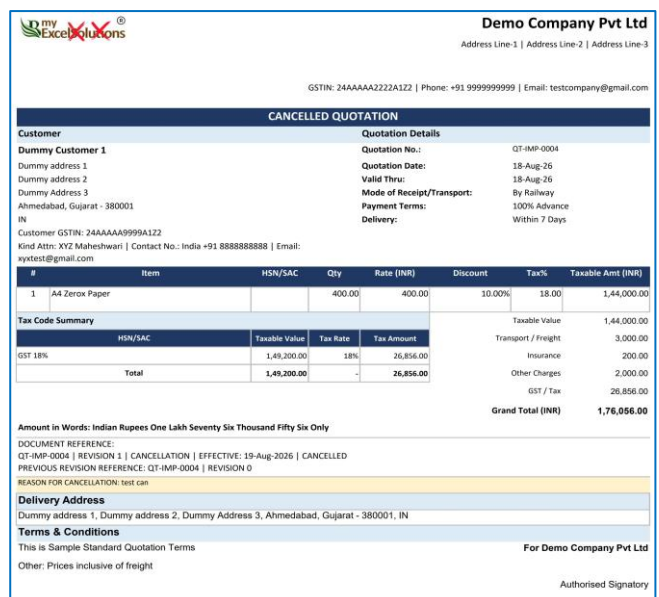
Lifecycle Action	Business use
Initial Draft	Prepare and review a quotation before official issue.
Issue Quotation	Freeze the approved original as an issued quotation.
Amendment	Controlled correction/change through a new revision.
Enhancement	Increase or extend scope/value inside the same quotation history.
Additional Quotation	Create a separately identifiable supplementary quotation under the same family.
Cancellation	Close an issued quotation through a terminal cancellation revision while retaining history.

Key control: after Issue, do not overwrite the historical quotation. Use Quotation Amendment / Revision.

2. Professional Quotation Print — Draft, Revision & Cancellation



Draft Quotation — Not Issued



Cancelled Quotation with cancellation identity

- Revision-aware document reference, effective date, lifecycle type and previous revision identity.
- Billing/Delivery locations, tax registration, contact person, reusable commercial terms and T&C.
- With Signature / Without Signature options plus optional contact, email and change reason.
- PDF or Excel output from the Quotation Print screen.

Quotation Management Pro Tool - DRAFT R1

Quotation Entry | Customer PO Entry | Customer PO Changes | Reports | Item Group | Item Entry | Quotation Print | Settings | Customer Master | Quotation Amendment / Revision | Commercial Masters

Master Type: T&C Template

Master Value: Standard Quotation Terms

This is Sample Standard Quotation Terms

☒ Active

Safe Delete

New

Activate / Inactivate

Save New

Refresh

Update

Clear

Master Value

Master Value	Status
Standard Quotation Terms	Active
Payment Terms	Active
Return Terms	Active

Template Details

Selected: Standard Quotation Terms

Clear

EXIT

Company: Demo Company Pvt Ltd

GST No.: 24AAAAA2222A1Z2

Commercial Masters — reusable T&C, transport, payment and delivery terms.

3. Customer PO Control — quotation to confirmed order

Quotation Management Pro Tool - DRAFT R0

Quotation Entry | Customer PO Entry | Customer PO Changes | Reports | Item Group | Item Entry | Quotation Print | Settings | Customer Master | Quotation Amendment / Revision | Commercial Masters

Customer: Dummy Customer 1

Quotation Number: QT-IMP-0003

Customer PO Number: Test01

Customer PO Date: 18-Aug-2026

Item: Bearings 32423

Customer PO Qty: 100

Customer PO Rate: 900

Discount: 10

Discount type: %

Taxes: 14580.00

Freight: 3000

Insurance: 100

Other Charges: 2000

Round Off: 0

Load Existing Customer PO: Test01

Load Customer PO

Delete Customer PO

Export Customer PO Template

Import Customer PO Template

Edit Selected Item

Delete Selected Item

Save Customer PO

Clear

EXIT

Company: Demo Company Pvt Ltd

GST No.: 24AAAAA2222A1Z2

Tax method for other charges: Prorate

Currency: INR

Total Amount: 95,580.00

Quotation Pending Qty: 550

Quotation Rate: 1,000.00

Live Customer PO Total: 101,598.00

Item Grid

Item	Qty	Rate	Amount
Bearings 32423	100.00	900.00	18.00
			95,580.00

Customer PO Entry — Customer, Quotation, Customer PO No./Date, pending Qty, quotation rate and item grid.

Same-customer control

Customer PO can be recorded only for the same Customer linked to the selected Quotation.

Pending visibility

Quotation Pending Qty and Quotation Rate are visible while entering the Customer PO.

Multiple Customer POs

Multiple PO references from the same Customer can be linked to the same Quotation.

Import / Export

Controlled Customer PO template supports bulk entry with validation.

Customer PO is treated as a downstream commercial transaction against the issued quotation—not as a replacement for the quotation history.

4. Customer PO Changes — Amendment, Enhancement & Cancellation

Quotation Management Pro Tool - DRAFT R0

Quotation Entry | Customer PO Entry | Customer PO Changes | Reports | Item Group | Item Entry | Quotation Print | Settings | Customer Master | Quotation Amendment / Revision | Commercial Masters

Customer: Dummy Customer 1 Tax method for other charges: Prorate Currency: INR

Change Reference No: Trst Change Change Type: Amendment

Change Date: 18-Aug-2026

Quotation Number: QT-IMP-0003

Item: Bearings 32423

Customer PO Number: Test01

Revised Effective Qty: 100.00 Current Effective Qty: 100.00

Rate: 900.00 Customer PO Rate: 900.00

Customer PO Discount: 10 % Discount type: Tax Rate %

Tax Impact: 0.00 Tax Rate %: 18.00

Line Value Impact: 0.00

Freight: 3000

Insurance: 100

Other Charges: 2000

Round Off: 0

Load Existing Change: Trst Change

Load Change Delete Change

Export Change Template Import Change Template

Edit Selected Change Delete Selected Change Save Change

Clear EXIT

Company: Demo Company Pvt Ltd GST No.: 24AAAAA2222A1Z2

Item	Qty	Rate	Amount	Tax	Total
Bearings 32423	100.00	900.00	850.00	18.00	-14,337.00

Customer PO Changes — revised effective Qty, commercial values, reason and value impact.

- Amendment: controlled reduction/correction in effective Customer PO quantity or permitted commercial values.
- Enhancement: increases effective Customer PO quantity within quotation controls.
- Cancellation: complete cancellation can reduce the effective quantity to zero without deleting the original Customer PO.
- Rate, discount, tax and header charges can be handled through the change workflow where applicable.
- Change Reference, Change Date, Change Reason and impact preserve a traceable history.
- Export / Import Change Template supports controlled bulk changes.

Demo Company Pvt Ltd
Customer PO Change Register - Detailed
Period: 01-Apr-2026 to 19-Aug-2027

Customer: Dummy Customer 1 Change Reference No: New ref

Change Date: 18-Aug-2026 Quotation Number: QT-IMP-0003 Currency: INR

Sr.	Customer PO Number	Item	Reason	Change Qty	Rate	Change Discount	Tax %	Taxable Value	Tax Amount	Line Total
1	Test01	Bearings 32423	cancel test	-90.00	850.00	-7,650.00	18.00	-68,850.00	-12,393.00	-81,243.00
Change Item Impact										
Freight -3,000.00										
Insurance -100.00										
Change Other Charges -2,000.00										
Tax on Other Charges -918.00										
Round Off 0.00										
Change Value Impact -87,261.00										

Customer: Dummy Customer 1 Change Reference No: Trst Change

Change Date: 18-Aug-2026 Quotation Number: QT-IMP-0003 Currency: INR

Sr.	Customer PO Number	Item	Reason	Change Qty	Rate	Change Discount	Tax %	Taxable Value	Tax Amount	Line Total
1	Test01	Bearings 32423	Test changes	-10.00	850.00	-1,350.00	18.00	-12,150.00	-2,187.00	-14,337.00
Change Item Impact										
Freight 0.00										
Insurance 0.00										
Change Other Charges 0.00										
Tax on Other Charges 0.00										
Round Off 0.00										
Change Value Impact -14,337.00										
GRAND TOTAL -100.00 -9,000.00 -81,000.00 -14,380.00 -1,01,510.00										
Total Other Charges (Excl. Tax) -5,100.00										
Tax on Other Charges -918.00										
Total Round Off 0.00										

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Demo Company Pvt Ltd
Customer PO Change Register - Summary
Period: 01-Apr-2026 to 19-Aug-2027

Sr.	Change Date	Change Reference No	Customer	Quotation Number	Currency	No. of Items	Taxable Value Impact	Change Discount	Tax Impact	Other Charges Impact	Tax on Other Charges Impact	Round Off Impact	Change Value Impact
1	18-Aug-2026	New ref	Dummy Customer 1	QT-IMP-0003	INR	1	-68,850.00	-7,650.00	-12,393.00	-5,100.00	-918.00	0.00	-87,261.00
2	18-Aug-2026	Trst Change	Dummy Customer 1	QT-IMP-0003	INR	1	-12,150.00	-1,350.00	-2,187.00	0.00	0.00	0.00	-14,337.00
GRAND TOTAL													

5. Reporting is a core strength

Quotation Management Pro Tool - DRAFT R0

Quotation Entry | Customer PO Entry | Customer PO Changes | Reports | Item Group | Item Entry | Quotation Print | Settings | Customer Master | Quotation Amendment / Revision | Commercial Masters

File Name and Path

Folder Path C:\Reports\ ☒ Export as PDF ☐ Export as Excel

Quotation Pending & Validity Reports

As On Customer Item

Other Reports

As On Customer (All/select) Item

Status

Rate Diff Type Period From Period To

Company: Demo Company Pvt Ltd GST No.: 24AAAAA2222A1Z2

Reports tab — output folder, PDF/Excel, dates, filters and report buttons.

Pending Visibility

Know what is still open by quotation, customer, item and quotation family.

Exception Analytics

Identify excess quantity, rate differences, validity-expired exposure and unlinked transactions.

Reconciliation

Compare quotation quantity with Customer PO position, changes and current-effective status.

Registers & Audit

Quotation, Customer PO and Customer PO Change registers plus Activity Log and Price History.

Demo Company Pvt Ltd
Pending Quotations Report
As On: 19-Aug-2027

Quotation Number	Quotation Date	Item	Item Group	Quotation Qty	Quotation Value	is Customer PO	Pending Qty	Pending Value	Status
Customer: Demo Customer 2									
QT-MP-0002	18-Aug-2026	Bearings 32423	Consumables	500.00	5,00,000.00	0.00	500.00	5,00,000.00	Pending
Subtotal - Demo Customer 2				500.00	5,00,000.00	0.00	500.00	5,00,000.00	
Customer: Dummy Customer 1									
QT-MP-0003	18-Aug-2026	Bearings 32423	Consumables	550.00	5,50,000.00	100.00	550.00	5,50,000.00	Pending
QT-MP-0005	18-Aug-2026	Bearings 32423	Consumables	4,000.00	44,00,000.00	0.00	4,000.00	44,00,000.00	Pending
Subtotal - Dummy Customer 1				4,550.00	49,50,000.00	100.00	4,550.00	49,50,000.00	
GRAND TOTAL				5,050.00	54,50,000.00	100.00	5,050.00	54,50,000.00	

Pending Quotations Report

Demo Company Pvt Ltd
Quotation vs Customer PO Qty Reconciliation Report
As on: 19-Aug-2027
Filter: Item = A4 Zerox Paper

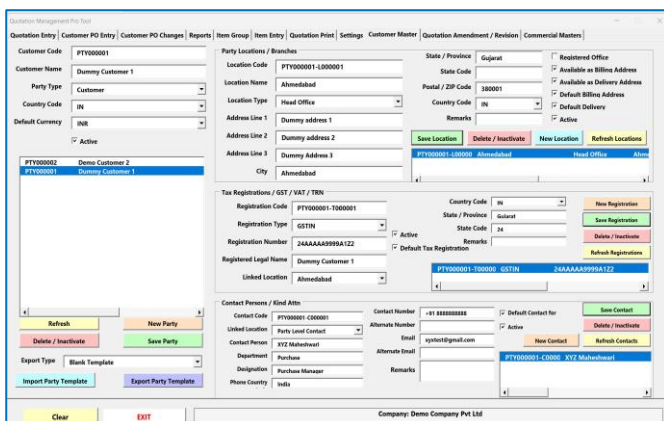
Quotation Number	Quotation Date	Item	Quotation Qty	Customer PO Qty	Qty Diff	Quotation Rate	Customer PO Rate	Rate Match	Status
Customer: Dummy Customer 1									
QT-MP-0004	18-Aug-2026	A4 Zerox Paper	400	400	0	0	400.00	400.00	Match
Subtotal - Dummy Customer 1				400	400	0	0		
GRAND TOTAL				400	400	0	0		

Quotation vs Customer PO Reconciliation

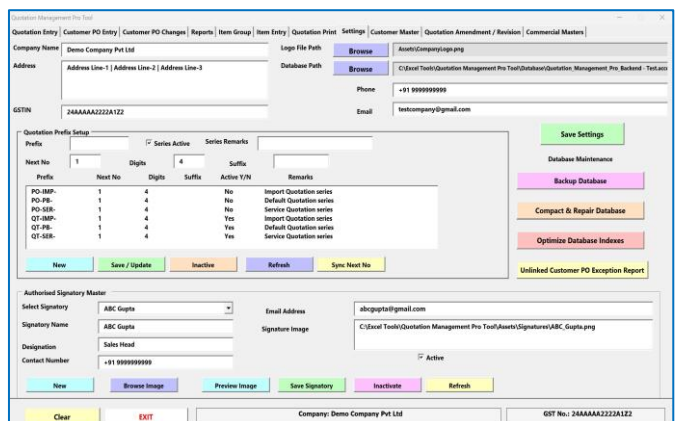
6. Complete Report Portfolio

Category	Report	Use / Business Value
Pending & Validity	Quotation Pending Report (Qty & Value)	Quotation/item-wise pending quantity and value as on date.
Pending & Validity	Customer-wise Quotation Pending Summary	Customer-level consolidated pending exposure.
Pending & Validity	Item-wise Cum Customer-wise Pending Summary	Item-centric pending position across Customers.
Pending & Validity	Quotation Family Pending Report	Pending using connected quotation family/current-effective logic.
Pending & Validity	Quotation Validity Expired Report	Expired quotations that still require pending attention.
Reconciliation	Quotation vs Customer PO Qty Reconciliation	Quotation Qty vs effective Customer PO position and Qty difference.
Reconciliation	Quotation Family Reconciliation	Family-aware reconciliation across connected quotation documents.
Exceptions	Excess Customer PO Qty / Value	Highlights effective Customer PO quantity/value beyond quotation position.
Exceptions	Quotation vs Customer PO Rate Difference	Quotation rate vs effective Customer PO rate analysis.
Exceptions	Customer PO-wise Rate Difference	Rate difference analysed at individual Customer PO level.
Exceptions	Gross Excess Customer PO Qty	Gross Customer PO quantity beyond quotation quantity.
Registers	Quotation Register - Detailed / Summary	Detailed or compact quotation lifecycle register.
Registers	Customer PO Register - Detailed / Summary	Detailed or compact Customer PO register.
Registers	Customer PO Change Register - Detailed / Summary	Detailed or compact change-history register.
Masters	Item List - Group-wise / Item-wise	Item Master listing by Group or Item.
Audit	Activity Log Report	Lean audit of controlled actions and successful signed quotation prints.
History	Quotation Price History Report	Historical effective rate and trend across quotation revisions.
Exception / Admin	Unlinked Customer PO Exception Report	Identifies Customer PO rows needing quotation/document-link attention.

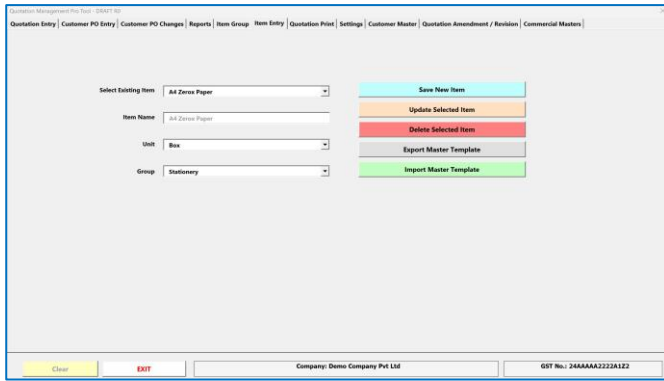
7. Masters, Settings & Commercial Readiness



Customer / Party Master

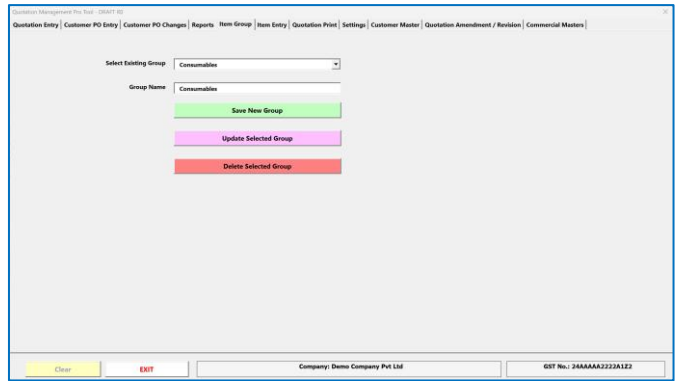


Settings — company, database, numbering & signatory



Item Master Form showing fields for Select Existing Item, Item Name, Unit, and Group. Buttons include Save New Item, Update Selected Item, Delete Selected Item, Export Master Template, and Import Master Template.

Item Master



Item Group Master Form showing fields for Select Existing Group and Group Name. Buttons include Save New Group, Update Selected Group, and Delete Selected Group.

Item Group Master

- Customer/Party Master supports locations, tax registrations and contacts.
- Item & Group Masters support controlled create/update/delete and Item import/export template.
- Commercial Masters provide reusable T&C, transport, payment, delivery and other terms.
- Settings controls Company details, logo, quotation number series, authorised signatory and database path.
- Database maintenance includes Backup, Compact & Repair and Optimize Database Indexes.

CONTROL THE QUOTATION. TRACK THE CUSTOMER PO. SEE THE POSITION.

Quotation Management and Control Software by My Excel Solutions Pvt Ltd is designed for businesses that need more than a basic quotation print utility. It combines quotation lifecycle control, Customer PO tracking, post-PO change management and management reporting in one controlled workflow.

Demo Company Pvt Ltd
Quotation Price History Report
Period: 01-Apr-2025 to 19-Aug-2027

History Rows: 4 | Items: 2 | Customers: 2 | Increases: 0 | No Change: 1 | First Rates: 2

Effective Rate is the net and rate after tax discount. Previous Effective Rate means the immediately preceding Effective Rate of the same item within the selected period and item.

Sr.	Item Group	Item	Unit	Quotation Date	Customer	Quotation Number	Quotation Qty	Effective Rate	Previous Effective Rate	Rate Change	Change %	Minimum Effective Rate	Maximum Effective Rate	Trend
1	Stationery	A4 Zebra Paper	Box	18-Aug-2025	Quincy Customer 1	Q1-APP-0001	400.00	900.00				900.00	900.00	First Rate
2	Consumables	Stearing 13403	Box	18-Aug-2025	Quincy Customer 2	Q1-APP-0002	100.00	900.00				900.00	1,286.75	First Rate
3	Consumables	Stearing 13403	Box	18-Aug-2025	Quincy Customer 1	Q1-APP-0003	100.00	900.00	900.00	0.00	0.00%	900.00	1,286.75	No Change
4	Consumables	Stearing 13403	Box	18-Aug-2025	Quincy Customer 1	Q1-APP-0004	4,000.00	1,286.75	900.00	386.75	30.08%	900.00	1,286.75	Increase

Quotation Price History

Demo Company Pvt Ltd
Activity Log Report
Period: 01-Apr-2025 to 19-Aug-2027

Windows User and Computer Name are captured automatically, no application login is required.

Sr.	Date & Time	Windows User	Computer	Action	Area	Reference	Status	Details
1	18-Aug-2025 15:24	Shwansari	SHWANSARI	PRINT	PO Print	Q1-APP-0003	Success	PO Print: Signed Signature: ABC Gupta Contact: Printed Email: Printed Format: PDF
2	18-Aug-2025 15:32	Shwansari	SHWANSARI	CANCEL	Customer PO	New ref Text05	Success	Complete Customer PO Cancellation saved. All remaining effective item quantities set to zero. Value Impact: -453,138.00
3	19-Aug-2025 09:05	Shwansari	SHWANSARI	CANCEL	Purchase Order	Q1-APP-0004	Success	Issued PO cancelled successfully. Revision: 1 Effective Date: 19-Aug-2025 Cancelled By: Purneshwar Shwansari
				TOTAL	3 Activity Record(s)		3 Success 0 Failed	

Activity Log

Quotation Control • Customer PO Traceability • Change History • Management Visibility

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8. Protected Deployment, Licensing & LAN Expansion

One Primary application supports both single-PC use and future LAN expansion, with protected EXE delivery and separate activation for each additional LAN Client.

Deployment Option	How it Works	Customer Benefit
Single-PC Use	Activate Quotation Management and Control Software on the Primary computer and use the local Access database. LAN setup is not required.	Simple first installation with no unnecessary network steps.
LAN Expansion	Use the same Primary software, configure the shared Access database, install the LAN Server Component, and activate Quotation Management and Control Software LAN on each additional computer.	Upgrade to LAN later without replacing the Primary software.
Protected EXE Delivery	Primary and LAN applications are supplied as XLS Padlock protected EXEs with activation control.	Commercial deployment without distributing the XLSM source workbook.
Safe License Deactivation	Use Deactivate License before replacing, reformatting or moving the licensed Primary computer.	Controlled licence transfer; LAN authorization stops when the Primary licence is deactivated.

LAN Authorization Flow

1. Primary	2. Configure LAN	3. Server Component	4. Additional LAN PC
Activate Primary licence	Select the shared Access database; the software converts the path to UNC where applicable.	Install the background LAN Server Component on the Primary/Server computer.	Activate the separately supplied Quotation Management and Control Software LAN Client.

Commercial model: For LAN users only - each additional computer requires its own activated Quotation Management and Control Software LAN Client. A valid Primary licence and an active LAN Server Component are required for LAN operation.

Operational Safeguards

- The LAN Server Component runs independently in the background; the Primary application does not need to remain open continuously for heartbeat updates.
- LAN authorization files are managed automatically and should not be edited, renamed or copied between products.
- The shared Access database remains the central data source for authorised LAN users.
- Single-PC customers can purchase LAN Client licences later and convert the existing installation to LAN use.

Quotation Management and Control Software combines controlled quotation lifecycle, Customer PO tracking, post-PO change management, reporting and a practical upgrade path from one computer to multiple LAN users.

My Excel Solutions Pvt Ltd

Delivering Excellence Beyond Expectations

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