

Offer Overview

The **Offer Overview** in **Surface Solutions** provides central management of all created offers. It allows you to quickly review the status, details, and next steps for each offer.

You can access the Offer Overview via the "**Offers**" item in your navigation bar.



Calculations **Offers** Orders Invoices Purchases

Overview and Filters

In the overview table, you can see the following information for each offer:

- Offer number
- Creation date
- Customer
- Creator
- Status
- Net and gross amount

You can filter offers by **status** and **customer** or use the **free-text search** to find specific offers. Filtering is dynamic, and the overview is updated accordingly.

Offer.NO	Date	Customer	Creator	Status	Net Amount	Gross Amount				
ANG-2025/Q4-000010	10/23/2025, 09:05 PM	Fahradprofi Rainer GmbH	Moritz Stadler	Won	1,682.85 €	2,002.59 €	Create Follow-up Offer	Go to Order →	📄	📄 Export as PDF
ANG-2025/Q4-000009	10/23/2025, 08:18 PM	Fahradprofi Rainer GmbH	Moritz Stadler	Won	1,352.13 €	1,609.03 €	Create Follow-up Offer	Go to Order →	📄	📄 Export as PDF
ANG-2025/Q4-000008	10/23/2025, 04:56 PM	Fahradprofi Rainer GmbH	Moritz Stadler	Won	7,064.42 €	8,406.66 €	Create Follow-up Offer	Go to Order →	📄	📄 Export as PDF

Actions for Offers

The following actions are available for each offer:

- **Create Follow-Up Offer:** The offer is copied, allowing minor adjustments without creating a new calculation. For more complex changes, duplicating the calculation is recommended.

- **Send Offer via Email or Export as PDF:** Data is automatically adopted from the customer database, the calculation, and the document definition.

Status "Won" and Order Creation

The **status field** is particularly important:

When you set the status of an offer to **Won**, the **"Generate Order"** button appears automatically. Clicking this button creates an order based on the offer, adopting all positions, prices, and information.

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Revision #2

Created 29 October 2025 10:48:38 by Admin2

Updated 29 October 2025 11:51:31 by Admin2