

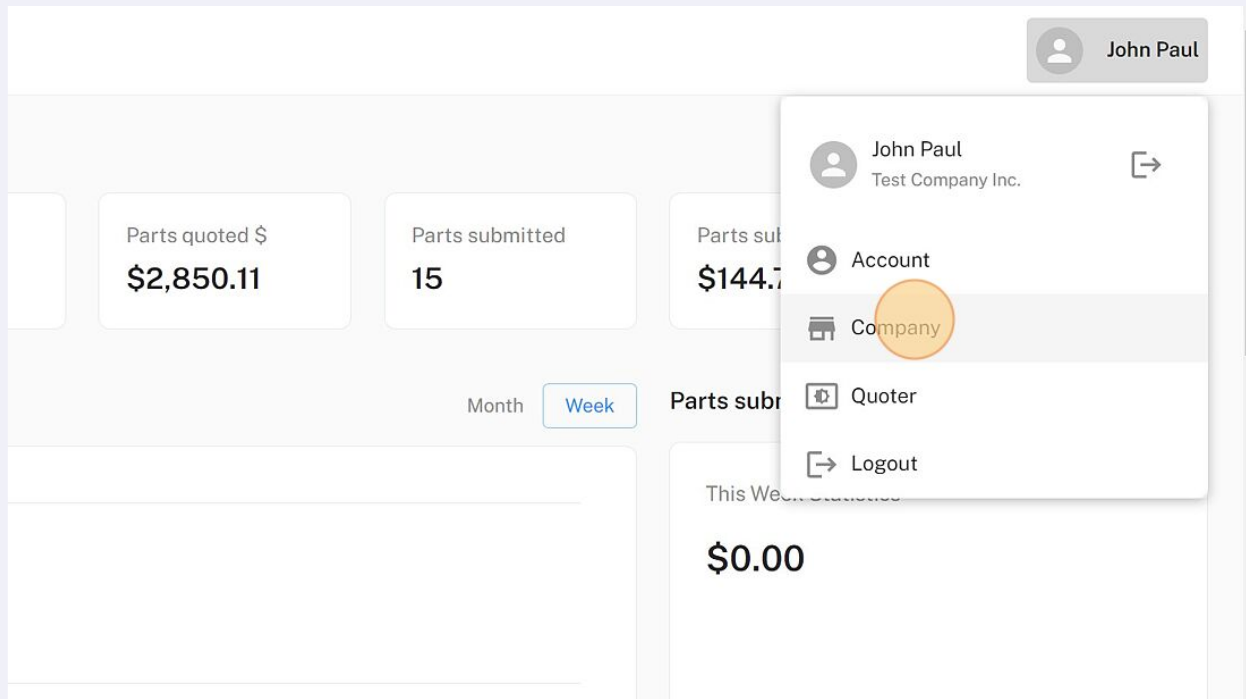
Company Information

Change your business information, VAT, and other information for customers to see. Additionally, you can add custom statuses to manage your leads more efficiently.

1 Click on the profile icon

The screenshot displays the AI QUOTER v1.0.0 dashboard. On the left is a navigation menu with sections: Leads (Dashboard, Overview), Quoter, Process, Material Category, Material, and Color. The main dashboard area features a 'Dashboard' section with six summary cards: Total Users (38), Parts quoted (48), Parts quoted \$ (\$2,850.11), Parts submitted (15), Parts submitted \$ (\$144.78), and Memory used (45.94 MB). Below this is a 'Usage' chart with a blue area plot and a 'Parts submitted in \$ terms' section showing 'This Week Statistics' of \$0.00. A user profile icon for 'John Paul' is visible in the top right corner.

2 Click "Company"



3 Enter your company information. This information will be shown on the quote for customers. The tax rate will be applied to the calculated price.

A screenshot of the AIQUOTER v1.0.0 application. The left sidebar contains navigation items: Leads, Dashboard, Overview, Quoter, Process, Material Category, Material, and Color. The main content area is titled "Company" and contains a form with the following fields:

- Company Name: Test Company Inc. (highlighted with an orange circle)
- Company URL: https://quoter.ai/
- Company Email: contact@company.com
- Sales Email: sales@company.com
- Company Phone: 573-647-6042
- Street: 4903 Oak Ridge Drive
- Place: Rolla
- Zip: 65401
- Country: United States (with a dropdown arrow)
- Currency: USD (with a dropdown arrow)
- VAT: 982852106
- Tax Name: VAT
- Tax: % 7.25

On the right side, there is a "Company Logo" field and a "Company Info" section containing the text "This is a prelim project."

4 Add your company logo, which will be visible in the instant quoter.

Company URL
https://quoter.ai/

Sales Email
sales@company.com

Name
John Doe

Address
123 Main St

City
New York

Country
United States

ZIP
10001

Phone
(212) 555-1234

Calculator URL
https://calc.quoter.ai/client/QmqDHj

Company Logo
AI QUOTER
Select Logo

Company Info
This is a preliminary quote. We will contact you shortly, to talk through the project.

5 In this section, you can set your statuses to manage leads. There are several default statuses, which you can customize but not delete. Additionally, you can add a new status, according to your workflow.

v1.0.0

John Pa

days 14

https://calc.quoter.ai/client/QmqDHj

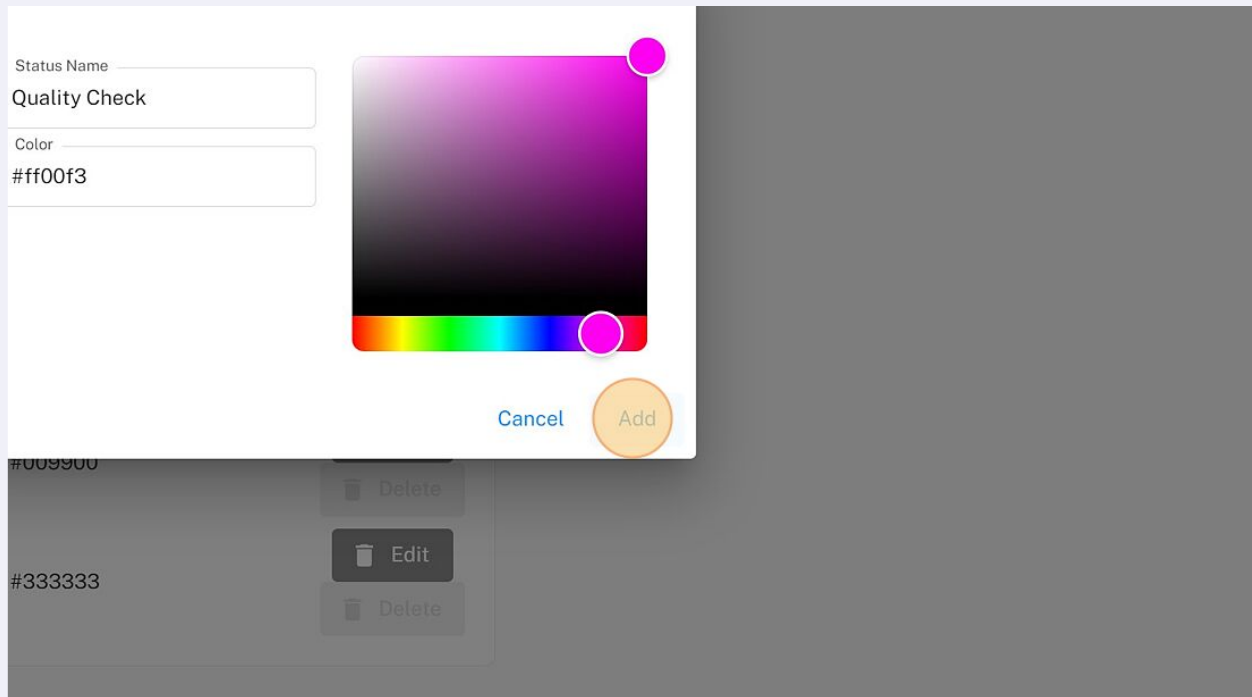
Status

+ Add

Open	#d6d6d6	Edit	Delete
Requested	#fff200	Edit	Delete
In progress	#3dce00	Edit	Delete
Closed-Won	#009900	Edit	Delete
Closed-Lost	#333333	Edit	Delete

6

Here we created a new Status, called "Quality Check". This one could be used for an internal team to check the feasibility in terms of the required quality.



7

Click "Save" to save your changes.

