

Managing Existing Quotes

Quote States

Quotes may be in one of 6 states:

1. **Creating** - All unsent quotes in the process of being built.
2. **Pending** - A quote that has been emailed to the user and is awaiting their review and approval/rejection.
3. **Approved** - A quote that has been accepted by the end user. May have comments from the end user
4. **Rejected** - A quote that has been accepted by the end user. Should have comments from the end user regarding why the quote was rejected.
5. **Accepted** - A quote that has been approved by the end user AND accepted by the facility
6. **Archived** - All quotes that are no-longer active in the system. Generally accepted quotes are moved to "archived" after work has begun.

Select Group

Software Development

Quote List - 61 

Active Quotes Search Quotes Archived Quotes

>  Creating (2)

>  Pending (13)

>  Approved (9)

>  Rejected (0)

>  Accepted (9)

Select Group

Software Development

Quote List - 61 

Active Quotes [Search Quotes](#) Archived Quotes

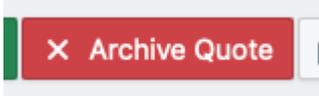
- Quote ID (Exact Match)
- ✓ Recipient Name (Partial Match)
- Recipient Email (Partial Match)
- Description (Partial Match)
- Tags (Partial Match)
- Line Service Name (Partial Match)
- Line Description (Partial Match)

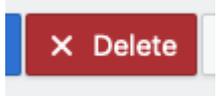
Search

provided

Deleting/Archiving Quotes

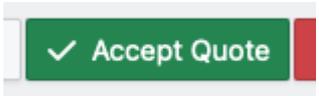
Creating and Pending quotes may be deleted at any time. Approved, Rejected, and Accepted quotes will be marked as archived instead of being deleted outright.

 X Archive Quote

 X Delete

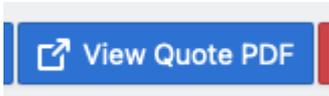
Accepting Quotes

An approved quote may be marked as accepted by clicking the "Accept Quote" button. Pending quotes may not be "force approved"

 ✓ Accept Quote

Previewing Quotes

Any quote that has been saved at least once may be previewed by clicking on the "View Quote PDF" button. This will open a PDF of the quote in question in a new tab for review.

 View Quote PDF

Managers are encouraged to "Save" a quote and preview it prior to sending to ensure all appears as intended.

Duplicating Quotes

Any quote that has been saved at least once may be duplicated into a new quote. This is most often used to issue a new quote after a rejection since any quote no-longer in the "Creating" state cannot be edited.

A rectangular button with a light gray background and a thin border. On the left side, there is a small square icon containing a copy symbol. To the right of the icon, the text "Duplicate to New Quote" is displayed in a dark gray, sans-serif font.

 Duplicate to New Quote

Revision #4

Created 7 February 2023 18:51:24 by Elliot Francis

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