Module Overview

External users often have a need for a PDF quote for services prior to starting a project. Using the "Quotes" module managers can create and send PDF quotes to users for approval.

Workflow

1. Managers create a new quote using the Quote Wizard in the Quotes module
2. Once created quotes may either be saved in a "Creating" state or immediately sent to the end user for approval
3. Quotes that have been sent to end users are saved in the "Pending" state. Pending quotes are editable but updates will not be immediately sent to end users for approval. After updating a pending quote the quote should be sent to the user again.
4. Users will receive an email notification when a quote is ready for approval. Any user who receives the notification email will be able to sign off on the quote or reject it. Multiple user emails can be listed.
5. Users can click on a link in the notification email to access the Quote review screen. After reviewing the quote on this screen the user is prompted to provide their Full Name and either approve or reject the quote.
6. Once a quote is approved or rejected the manager who created the quote initially will receive a notification email regarding the approval/rejection.
7. Approved or rejected quotes can be archived for future reference.

Managers can clone previous quotes for convenience. When creating new quotes a full list of services for facilities that they control is available to select from in addition to freeform line entry.

All quotes have 2 notes sections for freeform comments/text relevant to the quote that do not appear on the quote PDF itself. These notes can be used/edited until the quote is archived.

> Quotes are marked as estimates for since very often project changes will occur. Provided quotes are not meant to represent commitments to specific pricing or services.

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