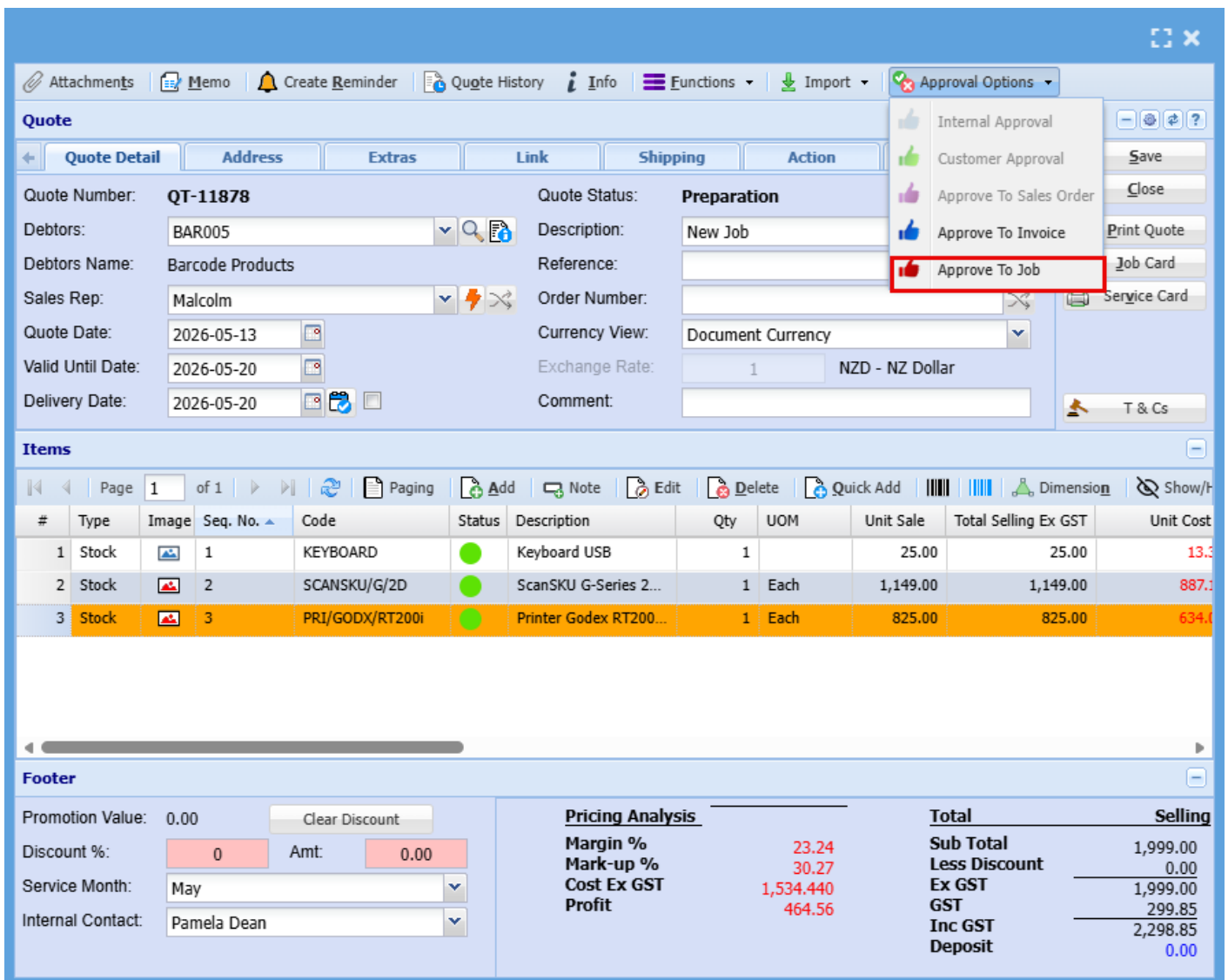


Promoting Quote to a Job

Promoting Quote to a Job

- Once a quote is accepted, it can be approved and converted into a job by clicking "**Approval Options**" and selecting "**Approve to Job**"



The screenshot shows a software interface for managing quotes. The top navigation bar includes links for Attachments, Memo, Create Reminder, Quote History, Info, Functions, Import, and Approval Options. The main section is titled 'Quote' and contains a 'Quote Detail' tab. The 'Quote Detail' tab shows the following information:

- Quote Number: QT-11878
- Debtors: BAR005
- Debtors Name: Barcode Products
- Sales Rep: Malcolm
- Quote Date: 2026-05-13
- Valid Until Date: 2026-05-20
- Delivery Date: 2026-05-20
- Quote Status: Preparation
- Description: New Job
- Reference:
- Order Number:
- Currency View: Document Currency
- Exchange Rate: 1 NZD - NZ Dollar
- Comment:

The 'Approval Options' menu is open, showing the following options:

- Internal Approval
- Customer Approval
- Approve To Sales Order
- Approve To Invoice
- Approve To Job (selected)

The 'Items' section shows a table of items:

#	Type	Image	Seq. No.	Code	Status	Description	Qty	UOM	Unit Sale	Total Selling Ex GST	Unit Cost
1	Stock		1	KEYBOARD	●	Keyboard USB	1		25.00	25.00	13.3
2	Stock		2	SCANSKU/G/2D	●	ScansKU G-Series 2...	1	Each	1,149.00	1,149.00	887.1
3	Stock		3	PRI/GODX/RT200i	●	Printer Godex RT200...	1	Each	825.00	825.00	634.4

The 'Footer' section shows the following information:

- Promotion Value: 0.00
- Discount %: 0
- Service Month: May
- Internal Contact: Pamela Dean
- Clear Discount
- Amt: 0.00

The 'Pricing Analysis' section shows the following information:

Margin %	23.24
Mark-up %	30.27
Cost Ex GST	1,534.440
Profit	464.56

The 'Total' section shows the following information:

	Selling
Sub Total	1,999.00
Less Discount	0.00
Ex GST	1,999.00
GST	299.85
Inc GST	2,298.85
Deposit	0.00

- Select the settings in the below screen for your job
- Click "**Continue**"

Approve Quote To Job

Quote - Approval

Job Details

BOM Create

Quote Number:

QT-11878

Debtors:

Barcode Products

Description:

New Job

Long Description:

Quote Date:

2026-05-13

Branch:

BARC

Order Number:

258258

Team:

Employee:

All

Department:

All

Function:

All

Est Start Date:

2026-05-13

Hrs:

1

Group Activity:

Completion Date:

2026-05-20

Delivery Date:

2026-05-20

Create PO Drop Ship:

Allow To Exceed Quote Value:

☒

Allow To Exceed Budget Qty:

☒

Activate Report Dates:

☒

Use Build Task Defaults:

☐

Charge Up (SC):

☐

Assembly:

☐

Prepriced (CTC):

☐

Lock Employee:

☐

Warehouse:

MAST - Master WHS

Job Link:

Continue

Close

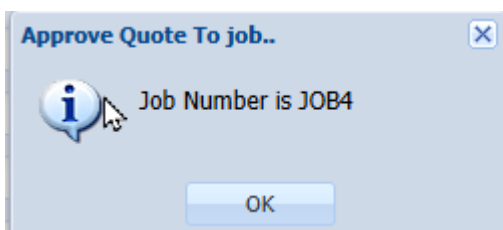
Service Card

Job Description	A brief description to help identify the job.
Order Number	A unique reference number assigned to an order to help identify and track it.
Long Description	A detailed explanation of an item, job, or order, providing more information beyond the short description.
Team	Used to assign a specific team to a job when teams are set up.
Employee	Used to assign a specific employee to a job.
Department	Used to assign or identify the department responsible for a job.
Function	
Est Start Date	The planned or expected date a job is scheduled to begin.

Group Activity	
Completion Date	The date a job is completed or expected to be finished.
Delivery Date	The date when goods or work are scheduled to be delivered or completed.
Create PO Drop Ship	Generates a purchase order for items to be shipped directly from the supplier to the customer.
Allow To Exceed Quote Value	Permits the final job or order cost to go over the originally quoted amount.
Allow To Exceed budget Qty	Permits the quantity used or ordered for a job to exceed the originally budgeted amount.
Active Report Dates	The date range selected to define which records or data are included in a report.
Use build Task Defaults	
Charge Up (SC)	Applies an additional charge to a job or item over and above the accepted quote amount.
Pre-priced (CTC)	Indicates that the cost is fixed in advance, already included in the pricing, and cannot be exceeded without further approval.
Assembly	
Lock Employee	Prevents changes to the employee assigned to a job without the necessary permission or approval.
Warehouse	Selects the warehouse location from which stock will be sourced for a job or order.
Job Link	Used to link or associate one job with another related job.
Service Card	Used to print a job card with the details required to complete a job.

A unique number automatically assigned to identify and track a job.

- Click "**OK**"



- To view your job click on **"Manage Job"**

Job Costing Module

Configuration

Activity

New Quote

Quotation

Bookin

Manage Job

Job Lines

Job Schedule Activity

GRV to Job

Job Total Analysis

Job Delivery Note

Job Invoice

Collect / Deliver

Job Search

Search Manage Job Views Start Job New Job Create Reminder Ready For Invoice Functions Print Print

Basic Search Custom Search Expand

Job Number:

Customer From:

Quote Number:

Date Type:

Date From:

Short Description:

Customer To:

Order No:

Job Status:

Date To:

Page 1 of 1

Remove Paging:

Total Budget: 2 594.00

Total Actual: 0,00

Total invoice:

#	Att	Memo	Due	Job Status	Team	Info	WIP O/S	% Completed	Est Start Date	Completion Date	Delivery Date	Start Date	Approved Date
1									2025-11-19	2025-11-19	2025-11-26	2025-11-19	2025-11-19
2							4		2026-04-21	2026-04-28	2026-04-28	2026-04-21	2026-04-21
3							2		2026-04-30	2026-05-15	2026-04-28	2026-04-21	2026-04-21
4							3		2026-05-13	2026-05-20	2026-05-20	2026-05-13	2026-05-13

Revision #1

Created 14 June 2026 23:47:46 by Pamela

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