

Quote Statuses

Job Costing > Activity > Job New Quote Search

The screenshot shows the 'Job Costing Module' interface. On the left is a sidebar with 'Configuration' and 'Activity' sections. The 'Activity' section lists various tasks like 'New Quote', 'Quotation', 'Bookin', etc. The main window is titled 'Quotes' and contains search filters for Quote Number, Description, Date Type, Date From, Order Number, Debtors, Reference, Quote Status, Date To, and Sales Rep. A dropdown menu for 'Quote Status' is open, showing options like 'Preparation And Scope Creep', 'Preparation, Scope Creep And Rejected', 'Internally Rejected', 'Requesting Internal Approval', 'Requesting Customer Approval', and 'All Valid Quotes Statuses'. Below the filters is a table with columns: Memo, #, Result, Att, Memo, Info, Status, Quote Date, Valid Until Date. The first row shows a quote with #1, a green status dot, and dates 2026-05-25 and 2026-06-01.

Preparation

This is the stage where a quote has been created.

Path:

All

Displays quotes across all status stages. It is not recommended to search using this status.

Scope Creep Quote

This applies when a quote is created from a job using the **Scope Creep Quote** function. The quote is considered to be in the preparation stage and must progress through all approval stages.

Requesting Internal Approval

This status indicates the quote has moved from **Preparation** to **Internal Approval**.

Path: Job Costing > Activity > Job Internal Quote Approval

Internal Approval

This is the stage where the quote is undergoing internal review and approval.

Job Customer Quote Approval

This status means the quote has progressed from **Preparation** or **Internal Approval** to **Customer Approval**.

Path: Job Costing > Activity > Job Customer Quote Approval

Customer Approved

This status indicates the quote has been approved (from Preparation, Internal Approval, or Customer Approval) and converted into an active job. The job is now available under **Manage Job**, essentially forming part of the order book.

Path: Job Costing > Activity > Manage Job

Internal Rejection

This occurs when a quote is rejected during the **Internal Approval** stage.

Customer Rejection

This occurs when a quote is rejected during the **Customer Approval** stage.

Cancelled

This status applies when a quote is cancelled at any stage of the quote process.

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