

Approve Quote to Job Screen

Job Details Tab

Approve Quote To Job

Quote - Approval

Job Details | **BOM Create**

1 Quote Number: QT298 5 Quote Date: 2025-10-31

2 Customer: Barcode 6 Branch: HSOF

3 Description: Sales 7 Order Number: 12587

4 Long Description:

Team: 8 Team 1 17 Allow To Exceed Quote Value: ☒

Employee: 9 All 18 Allow To Exceed Budget Qty: ☒

Department: 10 All 19 Activate Report Dates: ☒

Function: 11 All 20 Use Build Task Defaults: ☐

Est Start Date: 12 2025-11-04 Hrs: 1 21 Charge Up (SC): ☐ 25 Assembly: ☐

Group Activity: 13 ☐ 22 Prepriced (CTC): ☐ 26 Lock Employee: ☐

14 Completion Date: 2025-11-07 23 Warehouse: MAST - Master Warehouse

15 Delivery Date: 2025-11-07 24 Job Link:

16 Create PO Drop Ship: ☐

>>> Continue **X Close** **Service Card**

1	Quote Number	This is the Quote number linked
2	Customer	Customers Name
3	Description	This will be specific to the Job as an easy identifier in a list
4	Long Description	Here you can be more specific to the job
5	Quote Date	This is the date of the Quote

6	Branch	You can select a specific branch that this is linked to if you had these set up at the start
7	Order Number	Customer Order Number
8	Team	You can select a team if these have been setup
9	Employee	Refers to the specific person responsible for completing a task or project. It helps track accountability, scheduling, and communication.
10	Department	Add a department if this has been setup for your company
11	Function	
12	Est Start Date	Date estimated for Job to start
13	Group Activity	
14	Completion Date	Date Estimated for Job to be completed
15	Delivery Date	Date that the item is expected to be delivered to your customer
16	Create PO Drop Ship	This is to allow you to create a PO from the Job once its started.
17	Allow to Exceed Quote Value	Ticking this box allows actual job costs to exceed the quoted value. This is helpful when unexpected expenses arise during production or service delivery, and you want the system to continue tracking costs without treating the quote as a strict limit. If left unticked, a new quote must be created to include any additional costs.
18	Allow to Exceed Budget Qty	Ticking this box allows the actual quantity used in the job to exceed the budgeted amount. This is useful when additional units are required during production or service delivery. If left unticked, you'll need to produce a new quote to add more units.
19	Activate Report Dates	This will allow you to be able to report on this job

20	Use Build Task Defaults	When you create a build task default, you can specify alternative warehouses or item sources. Once a quote is converted into a job, the system will apply the defaults set in your build template. This ensures that materials are drawn from the designated warehouse rather than the main warehouse, allowing for more precise inventory control—especially when working with a master warehouse setup.
21	Charge Up (SC)	Charge Up (SC) means the customer is billed for actual time and materials used, including any extras beyond the initial scope. Charge Up allows you to invoice for additional costs incurred during the job.
22	Prepaid (CTC)	Prepaid refers to the quoted amount for the job, the fixed charge agreed to by the customer. You can't invoice beyond this amount, so any extra time, materials, or costs that exceed the quote become your internal expense, or ' Cost to Company (CTC) '
23	Warehouse	All stock will come from the Warehouse selected here
24	Job Link	You may find that you already have a job for this customer, and this is a sub job, to can select this job form the drop-down menu link to two or more jobs.
25	Assembly	"Assembly" refers to an internal process where components or materials are prepared, combined, or staged before installation or delivery. It's not billed separately to the customer but contributes to your overall job cost.
26	Lock Employee	You can lock the employee assigned to this job so it cannot be changed without your knowledge.

Revision #1

Created 3 June 2026 21:17:49 by Pamela

Updated 12 June 2026 21:14:02 by Pamela