# Job Quotes and Estimates

The Quotes Module is split into:

1. Contractor Quotes — Quotes that come from contractors/engineers via the Contractors Portal, Resource App or emailed into the client.
2. Sales Quotes — Sales quotes can be created independently or against a Job. For independent Sales quotes you will get an option to create a New job when quote is approved.

The *Jobs -> Job Quotes / Estimates —> Contractor Quotes* area shows a grid containing information on quotes and estimates that have been created for jobs and job tasks. You can view and edit details, add documents, submit or print the Quote / Estimate information to PDF by selecting the Quote / Estimate number (#) from the list.

You can filter the list by selecting the *Filters* button at the top-right of the page. This will reveal a number of filtering options for you to choose from:
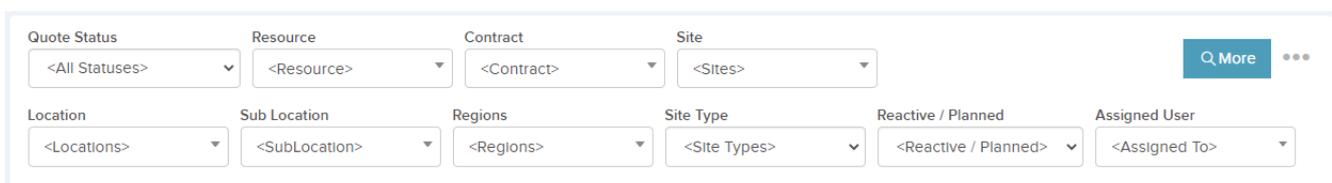
Next to the *Filters* button are three dots which gives you the option to export the list to excel.

Clicking on a Quote / Estimate number will bring you to the *Quote / Estimate Details* view:

(**Note:** Selecting *Edit Header* on this page will only allow you to modify the Description and Reference details.)

From here, you can view the *Job* or *Job Task Details* page by selecting the Job Number or Job Task Number from the list:

For Quotes / Estimates that have not yet been submitted, you will see an option to *Add Cost Row*. This will create a new row for you to populate with the Description, Materials, Labour, and Call Out costs. Click on *Update* to add this to the *Cost List:*
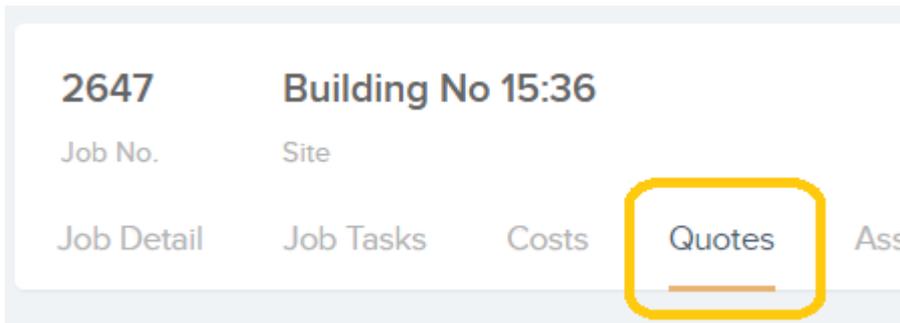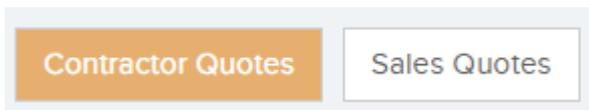

You will also see these options at the top-right of the page. You have the option to print the information to a PDF file, Submit the Quote / Estimate, or add Documents:

You can create a quote or estimate by going to the *Quotes* tab of the *Job Details* view of the job you would like to add to:
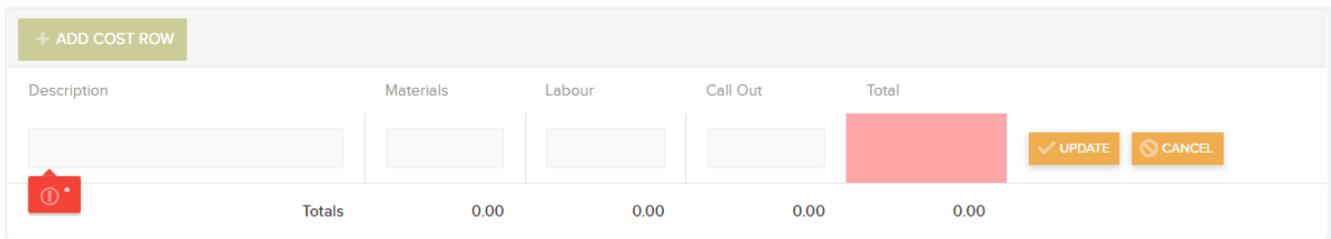
On this page you have the option to either create a *Contractor Quote* or *Sales Quote.*

Selecting *Contractor Quotes* will reveal a pop up where you can capture the information about the quote and click save.

When you click *Save* you will be taken to the *Contractor Quote Details* page where you will be asked to add Cost Rows:

After adding the cost row(s) you have the option to submit the quote / estimate for approval:

![x]

Selecting *Sales Quotes* will direct you to the New Sales Quote page where you can capture the information about the quote and click save.

When you click *Save* you will be taken to the *Sales Quote Details* page where you can edit Sales Quote Values and information. Sales Quotes can then be sent out via email.

If a quote / estimated has not been submitted, it will appear in the *Quotes / Estimates* grid of the *Quotes / Estimates* tab with the status of "Pending":

If a quote / estimate has been submitted, but not yet approved, it will appear with the status of "Submitted":

The job itself will also appear in the *Jobs List* with the status of "Quote Requested":

When all quotes for a job have been approved, it will appear with the status of "Quote Approved":