Knowledge Base

Introduction to Quotes & Estimates

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Introduction

Quotes and estimates are both important to your business to provide cost information to clients or customers and for your own reference, and both are easy to do with Gojee. These can be generated as a PDF, emailed directly to the client of the job, or shared internally. Gojee gives you the flexibility to customise your invoice to your liking and use Xero branding themes for your company logo. You can choose which line items to show to the customer and which to hide and include as part of a general quote, edit the cost fields directly, and more.

Please note that you will need to configure your branding themes before generating quotes. Please check the Configuring Xero section of the Xero article for more information on how to do this.

Sample Flow

An example flow of using Gojee for quotes/estimates:

- Build out basic BOM for job and generate a quote
  - This can be a single line item with a price, there's no need to go in depth if this is an early lead.
- (Optional) Hide unnecessary items from quote

- Send basic price as a quote to customer
- Initial approval
- Go back to BOM and fill out more specific information regarding the job
- Generate a new quote
- Send quote/quotes to get feedback from customer
    - Potentially redo previous step for further revisions and refinement.
- Customer approves job via email/message
- (Optional) Mark the quote as "Approved" to differentiate it from the other quotes and to freeze the BOM, preventing changes.
- (Optional) Create a Sales Order for the quote.

The quotes/estimates are generated directly from what you use for the job, smoothing out the process of managing what's necessary and figuring out what you need to tell your clients. For fixed price orders, it is recommended to generate invoices from quotes directly so that they can inherit the line item ordering and descriptions you've set up for that quote. Once you've approved a quote/estimate, you'll be able to generate sales orders to give to your staff.

Gojee provides workflows for both types of documents. Please refer to Create Quotes and Estimates to get started.

FAQ

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