Knowledge Base

Edit Quotes & Estimates

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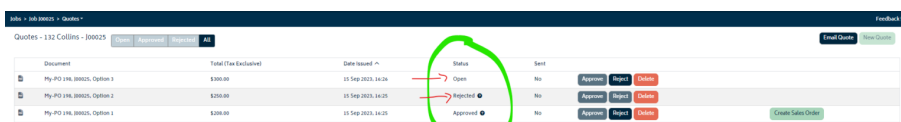
Introduction

Note: Quotes with status "Open" or "Rejected" can be edited, and in so doing the PDF of the quote will be regenerated and sent to the customer. Quotes with status "Approved" cannot be edited. Please reject an approved quote first if you wish to edit it.

To get started, navigate to either the job quote/estimate page (refer to the Job Actions section for more information) or to the Reports > Quotes page from the top navigation menu.

Editing Quotes/Estimates

- From the list of quotes, click on any open or rejected quote to edit it.

- Note that when clicking on the row from the list to open the edit page, you can click on any column where there is not a link, i.e. do not click on the PDF link, or the buttons at the end of the row if you want to open the edit page. You will see the following screen when you open the quote for editing:

- From this screen, make any changes required and hit Update Quote to update it. The quote will be updated and the Xero branding theme will be applied to the new version of the quote to create a new PDF link. Refer to Create Quotes and Estimates for more information on these options.

Next: Sales Orders.