

Knowledge Base



Edit Quotes & Estimates

Last updated on September 15th, 2023

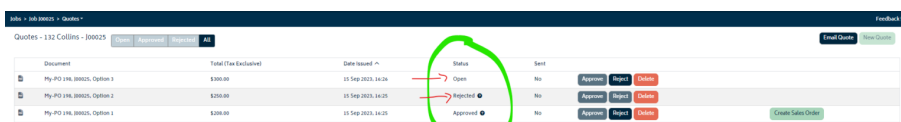
Introduction

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.



Document	Total (Tax Excluded)	Date Issued	Status	Sent
My-PD 146, 88025, Option 1	\$200.00	15 Sep 2023, 14:24	Open	No
My-PD 146, 88025, Option 2	\$200.00	15 Sep 2023, 14:25	Rejected	No
My-PD 146, 88025, Option 1	\$200.00	15 Sep 2023, 14:25	Approved	No

- 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:

Jobs > Job 00001 > Quotes > Edit Quote

Feedback

Edit Quote

Customer

Joe Collins

Reference

My PDI 116.00001, Option 1

Branding Theme

Standard

Show sales person

Total Quote: \$200.00

Includes a discount of \$0.00

Expected quote total: \$200.00

Total Job Cost: \$200.00

Markup: 0.00%

(Tax Excluded)

Description	Quantity	Unit Amount	Discount %	Amount
General quote amount	1	200.00	0	\$200.00
Additional items				0

Add new line

Total Quote: \$200.00

Includes a discount of \$0.00

(Tax Excluded)

Not Included

Search line items

Name	Price
Ceiling Fan	\$100.00
Show me on invoice	\$100.00

Update Quote

Cancel

- 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](#).