

Knowledge Base

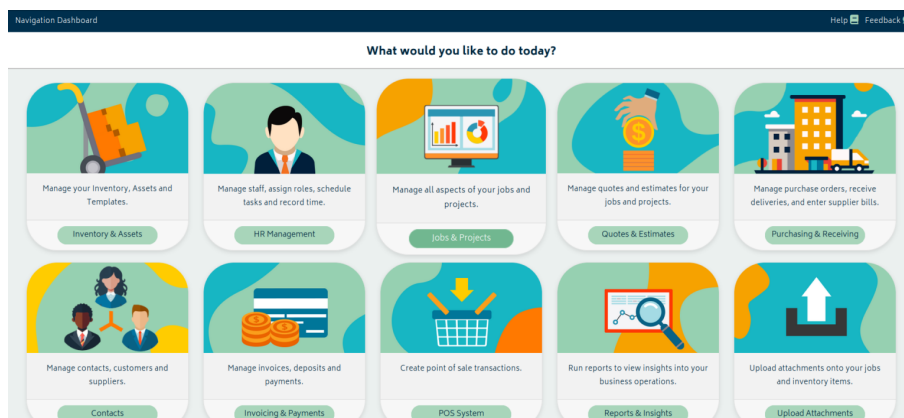


View Quotes and Estimates on the Job

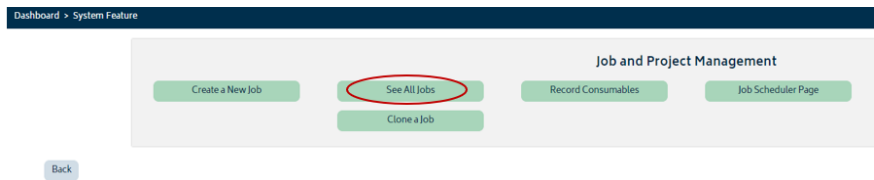
The following instructions can be used to view all the quotes or estimates for a particular job. You can use the navigation page or select Quotes (or Estimates) from that job's Job Actions.

Note: You can also navigate to the View all Quotes/Estimates page by navigating to Reports > Quotes from the top navigation menu. To execute all of the actions listed below however, including emailing, approving etc., you will need to be inside the job quote/estimate page, and not the global reports > quotes page.

Click on "Jobs & Projects" from the navigation page.



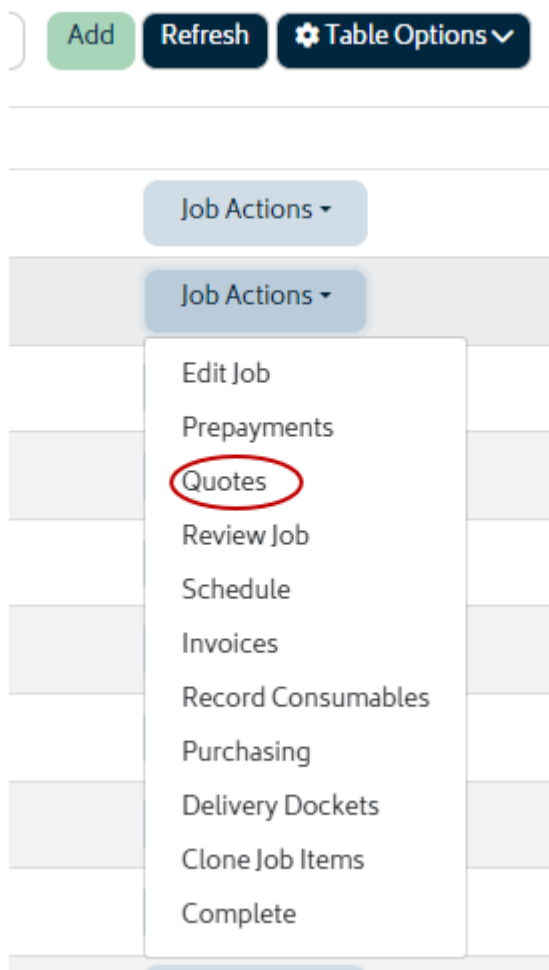
Click "See all Jobs"



Select the job that you want to view all the Quotes/Estimates for.

Customer Jobs								Add		Refresh	Table Options
Job reference	Customer	Job Title	Preferred Start Date	Last Update ^	Quoted Amount	Invoiced Amount	Deposit Amount				
300036	Dave Ward	-	20 Jul 2023	20 Jul 2023, 10:34	Not Quoted	Not Invoiced	No deposits	Job Actions			
300035	bayside club	-	12 Jul 2023	19 Jul 2023, 13:15	\$482.50	\$483.00	No deposits	Job Actions			
300032	bayside club	-	11 Jul 2023	12 Jul 2023, 10:12	\$167.29	\$167.29	No deposits	Job Actions			
300025	bayside club	-	06 Jul 2023	06 Jul 2023, 12:15	Not Quoted	\$429.62	\$5,000.00	Job Actions			
300024	bayside club	-	05 Jul 2023	05 Jul 2023, 18:55	Not Quoted	\$221.00	No deposits	Job Actions			
300023	bayside club	-	05 Jul 2023	05 Jul 2023, 18:48	Not Quoted	Not Invoiced	No deposits	Job Actions			
300022	bayside club	-	05 Jul 2023	05 Jul 2023, 18:31	Not Quoted	Not Invoiced	No deposits	Job Actions			
300020	Dave Ward	-	05 Jul 2023	05 Jul 2023, 14:58	Not Quoted	Not Invoiced	No deposits	Job Actions			
300018	bayside club	-	05 Jul 2023	05 Jul 2023, 12:30	\$458.01	\$458.01	No deposits	Job Actions			
300016	bayside club	-	04 Jul 2023	04 Jul 2023, 10:10	\$2,039.49	\$2,039.49	No deposits	Job Actions			

Click the Job Actions button & select either Quotes or Estimates.



You will be navigated to the quotes/estimates page for that specific job.

Jobs > Job JOB-123 > Quotes

Feedback

Quotes - Dales EarthWorks - JOB-123

Open Approved Rejected All

Email Quote New Quote

Quote Number	Reference	Currency	Total (Tax Exclusive)	Date Issued	Status	Sent	
INV-0966	17 - 4329438', JOB-123	AUD	2,435.74	30 Apr 2024, 11:20	Approved	No	Sales Order Quote Actions
INV-0943	16 - 4329438', JOB-123	AUD	2,435.74	12 Apr 2024, 11:46	Open	No	Quote Actions
INV-0937	14 - 4329438', JOB-123	AUD	519.40	04 Apr 2024, 10:37	Open	No	Quote Actions
INV-0930	13 - 4329438', COOLJOB	AUD	437.40	12 Mar 2024, 13:16	Open	No	Quote Actions
INV-0929	12 - 4329438', COOLJOB	AUD	437.40	12 Mar 2024, 1	Rejected	No	Quote Actions
INV-0898	3 - 4329438', COOLJOB	AUD	2.40	08 Mar 2024, 09:39			Sales Order Quote Actions
INV-0895	2 - 4329438', COOLJOB	AUD	2.40	08 Mar 2024, 09:38			Sales Order Quote Actions
INV-0894	1 - 4329438', COOLJOB	AUD	1.00	08 Mar 2024, 09:36	Open	No	Quote Actions

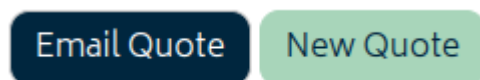
Note: This page will also be displayed once you've created a quote using the steps provided in the section above.

About the Quote/Estimate Page

Each of the elements in the quotes page will be explained below.



- **Filter Buttons:** Choose to show only Open / Approved / Rejected quotes. By default, system will show you all the quotes raised for this particular job with All.



- **Email Quote:** Allows user to email the quote/estimate from Gojee to customers directly.
- **New Quote:** Create a new quote for the same job. This will start the create quote process again. You can have any number of quotes for a job.

Quote Number	Reference	Currency	Total (Tax Exclusive)	Date Issued	Status	Sent	
INV-0969	3 - J01654	AUD	498.39	30 Apr 2024, 16:07	Open	No	Quote Actions
INV-0968	2 - J01654	AUD	499.39	30 Apr 2024, 16:07	Approved	No	Sales Order Quote Actions
INV-0967	1	AUD	498.39	30 Apr 2024, 16:06	Rejected	No	Quote Actions

- **Leftmost PDF symbol:** Direct link to the PDF of this quote, created using the chosen Xero branding theme. Click on this to download or view the PDF.
- **Quote Number:** Internal number for keeping track of quotes globally.
- **Reference:** By default, this number is the quote number and the job number, although this can be changed.
- **Currency:** Which currency the quote is in. This should be your organisation's currency unless Multi-currency is enabled in [Add-ons](#).
- **Total:** The total value of the quote.
- **Date Issued:** Timestamp of when the quote was created.
- **Status:** Whether a quote is Open, Approved, or Rejected. Rejected quotes will always have a grey background, and the approved quote will have a green background.
- **Sent:** Whether or not a quote has been emailed to the customer.

- Sales Order PDF: Link to the generated Sales Order for this quote. Will not appear unless generated.
- Quote Actions: Allows users to either approve, reject or delete a quote altogether. You can also create sales orders here and view audit logs tracking changes and events.
 - This button will be green if the quote is not rejected or grey if the quote has no further meaning. If an approved quote exists, buttons from non-approved quotes will also become grey like rejected quotes.

Emailing Quotes/Estimates

On the right-hand side of the page, there is an option to email a quote/estimate directly from Gojee:

Email Quote

New Estimate

te Issued ^	Status	Sent	
Jul 2024, 10:52	Approved	No	Quote Actions ▾
Jul 2024, 10:52	Open	No	Quote Actions ▾
Jul 2024, 08:00	Open	No	
Jul 2024, 09:19	Rejected ?	No	
Jul 2024, 08:56	Rejected	No	

Approve ?

Reject

Email Quote

Create Sales Order ?

Show Audit Trail

Delete

To email a document, you can either click on the Email Quote button and choose which quote you'd like to send from the dropdown list, or click Email Quote from the Quote Actions for a specific quote. If you select the Email Quote button from the top of the page, you'll have a choice of which to send:

Please select a quote to email ×

Select Quote ▾

J00023 - Double

J00023 - Standard

Please select a quote to email

ORC1048, 1 - J00001 - Quote 1, 583.00

To

Scott Mercer (scott@citylimousines.com)

Subject

Quote: 1 - J00001 - Quote 1 for Scott Mercer from Very Cool Demo Company (AU) 2024/07/02

Body

Hi Scott Mercer,

Here's quote reference 1 - J00001 - Quote 1 for AUD 641.30.

If you have any questions, please let us know.

Thanks,
Very Cool Demo Company (AU)

☒ Send bcc (blind carbon copy) to organisation email

☒ Include quote as attachment

Send Email
Cancel

- The Email will default to the customer's email address, as set up in the [customers](#) section. A new address can be added, or the address can be changed.
- The Subject will default to the dynamic text as shown, including the job number, the quote reference and the sender's organisation name.
- The Body will default to the dynamic text as shown, including the quote reference and the price. Feel free to customise or change it.
- Options to bcc the organisation email and include the quote as attachments are provided.

To send the email, hit the Send Email button.

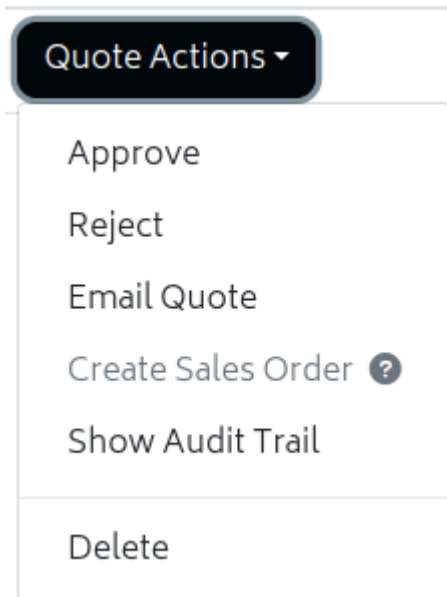
Note: When sending emails from Gojee, they will be sent from the address no-reply@gojee.com.au. A reply-to can be set in Organisation Setup > Email Settings.

If you believe the address will be an issue for your customers, you can send the email to your organisation and forward it to the customer from there.

Once the quote has been sent, the "Sent" field for the document on the job quote/estimate list page will note so. (If this status doesn't show immediately, simply refresh the page.)

Approve or Reject Quotes and Estimates

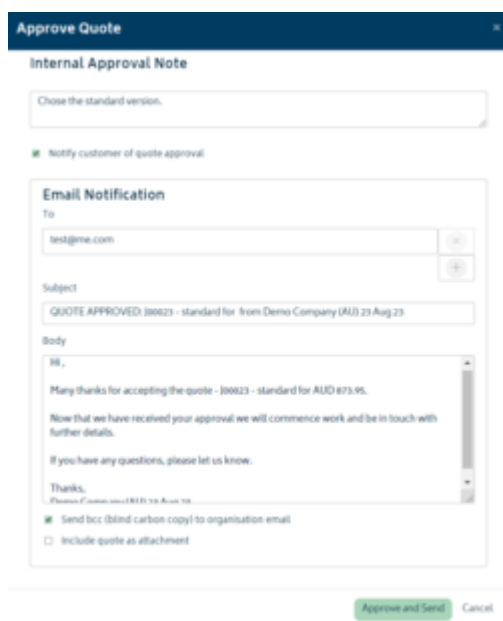
For each quote, you can choose to approve or reject the quote to make it clear which ones you will and will not be moving forward with from the Quote Actions menu:



A dropdown menu titled "Quote Actions" with a downward arrow. The menu contains the following options: "Approve", "Reject", "Email Quote", "Create Sales Order" (with a question mark icon), "Show Audit Trail", and "Delete".

To approve a document, follow these steps:

Click on the Approve option in the Quote Actions menu for the document you want to approve. You will be presented with the following screen:

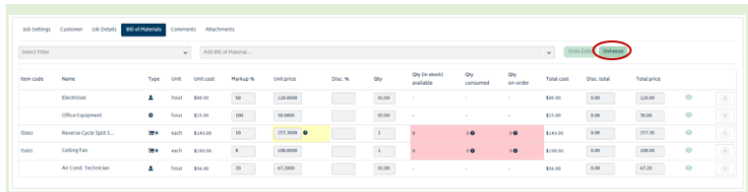


The "Approve Quote" screen features a dark blue header with the title "Approve Quote" and a close button. Below the header is a section for "Internal Approval Note" with a text input field containing the placeholder "Choose the standard version." and a "Notify customer of quote approval" checkbox, which is checked. The main section is titled "Email Notification" and includes a "To" field with "test@me.com", a "Subject" field with "QUOTE APPROVED: 38623 - standard for Iron Demo Company (AU) 23 Aug 23", and a "Body" text area containing a pre-filled email template. At the bottom of the email notification section are two checkboxes: "Send bcc (blind carbon copy) to organisation email" (checked) and "Include quote as attachment" (unchecked). At the very bottom of the screen are two buttons: "Approve and Send" (highlighted in green) and "Cancel".

From this screen, you are provided the following options:

- Add an internal approval note – this is a free text field where you can add any relevant text (reason for approval, date, etc.). This text will not be available to the customer.
- Option to notify customers of the document approval – if you click this checkbox, the details of the email will be provided as shown in the image above. There is a standard email body presented which is editable.
- If the email option is selected, the user can also choose to BCC the organisation email (as set in the [organisation settings](#)) so a copy is sent to that email address also.
- An option to attach the approved document is also provided.

Note: After a quote/estimate has been approved, the system will automatically freeze the BOM section on the job **in the state the BOM page was when the quote was approved**:



If the unfreeze button on the job is clicked, then the BOM of the job will return to the state it was in prior to the quote being approved. This means it may not be in the same state as the previously approved quote, but will instead be in the state of the last change made to the BOM. For example:

- User creates a job with 1 line item on the BOM page, and a quantity of 1 of the item.
- User raises a quote for this job – Quote 1.
- User returns to the BOM page and changes the quantity of the item to 2. Effectively doubling the price of the quote.
- User raises a second quote for the job based off the latest state of the BOM – Quote 2.
- Customer approves the first quote (Quote 1). As such the BOM page returns to showing the item with a quantity of 1 to match the quote.
- User then chooses to unfreeze the BOM (as per the button in the image above). As such, the BOM will return to its last saved state prior to the quote being approved, which will show a quantity of 2 for the item on the job in this example.

Note: Only one quote can be approved for each job. You can however reject an approved quote, and then approve another quote.

To reject a document, follow these steps:

Click on the Reject option in Quote Actions for the document. You will be presented with the following screen:

From this screen, you are provided the option to add an internal rejection note – this is a free text field where you can add any relevant text (reason for rejection, etc). This text will not be available to the customer.

Creating multiple quotes/estimates for one job

The New Quote button allows you to create any number of different quotes (or “versions”) for any one job.

Email Quote


New Quote

- This means you can start with one version of a BOM for the job, raise a quote or estimate for that, and then modify the BOM and create another quote for that version of the job and so on.
- When the customer chooses the version they like, you can simply approve that version, and the job BOM will be put back to the state for that version of the job.

Note: If there is an approved quote/estimate, the new quote button will be disabled. If you'd like to create a new quote for this job, you'll first need to reject the approved quote.

Creating a Sales Order

If the quote/estimate is in approved status, you will have the option of creating a Sales Order for internal use (or regenerating one that has already been generated, should one already exist for the quote in question).

Status	Sent		
Approved	Yes	 Sales Order	Quote Actions ▾
Open		Please make sure the sales order branding theme is set up in the organisation settings first. Sales orders are for distribution to people who don't need to see the financial information on a quote, such as employees who will be picking the items.	
Open	No		Recreate Sales Order ?
Open	No		Show Audit Trail
Open	No		Delete

As noted above, in order to properly generate a Sales Order, you must set up a special Xero style. To learn more about Sales Orders and learn how to set them up, please refer to the [Sales Orders](#) article.

Delete Quotes and Estimates

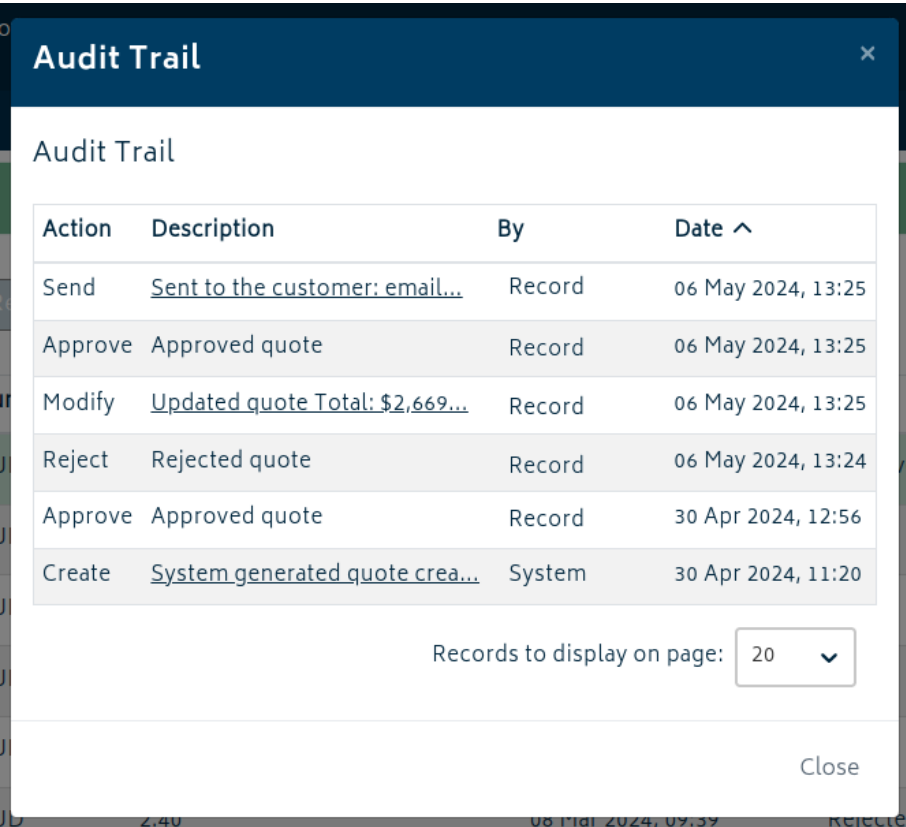
In each Quote Actions list, there is a button to delete the quote.

Quote Actions ▾
Approve
Reject
Email Quote
Create Sales Order ?
Show Audit Trail
Delete

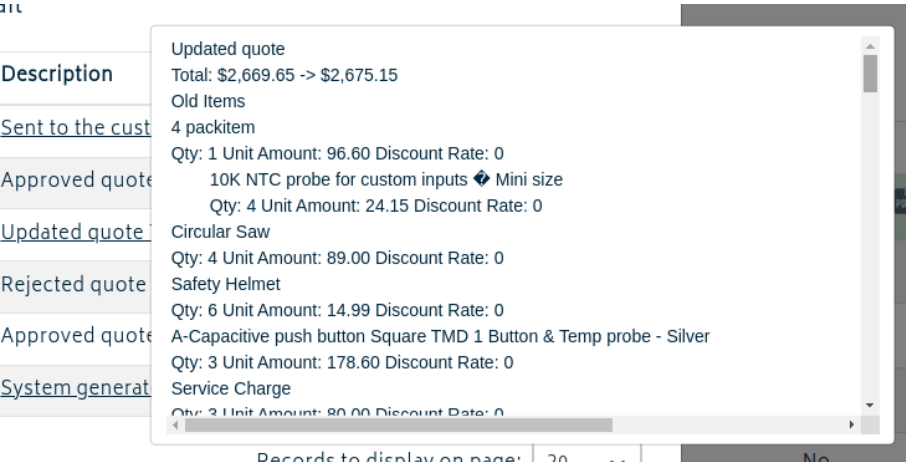
It is possible to delete any quote (even approved quotes), but it is not advisable. If the document is deleted, it is completely removed from the records and is not retrievable. There will be no history of the document being created or sent, and the audit trail will become irrecoverable. Please be careful.

Quote Audit Trail

In the Quote Actions menu you will find the Audit Trail option. Clicking it will present you with a log of actions taken regarding a quote.



Clicking truncated records will display the full record.



When the items or amounts on the quote change, full text copies of the quote in the before and after state will be saved. Emails sent will list the recipients, but not the contents of the email.

Note: If a quote is deleted, there is *no way* to retrieve its audit log.

Next: [Edit Quotes and Estimates.](#)