

Quotes Status

Description

The Quotes Status application is used to define the different states that a sales quote can have during its lifecycle. These statuses help sales teams track progress, filter records, and identify which quotes are active, accepted, rejected, or archived.

Examples of common statuses include "Draft", "Sent", "Accepted", and "Declined".

List view

SaltOS

Dashboard Applications

List - Quote Status

Admin

▼

⊕ New

Search

Q Search

✕ Reset

Name	Description	Active
Closed	Closed without result	✓
Converted	Converted to invoice	✓
Reviewed	Reviewed by manager	✓
Pending	Awaiting response	✓
Cancelled	Manually cancelled	✓
Expired	Quote validity expired	✓
Rejected	Customer rejected the quote	✓
Accepted	Customer accepted the quote	✓
Sent	Quote sent to customer	✓
Draft	Quote in preparation	✓
Total: 10		<div>⊕ Load more</div>

The following fields are displayed in the list view:

- Name: Label of the status (e.g., Draft, Accepted).
- Description: Explanation of when this status is applied.
- Active: Indicates whether the status is selectable in the Quotes module.

Form view

This view is used to create, view or edit quote status entries.

In **create** mode, the form is empty and allows you to build a new quote.

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SaltOSDashboardApplications

New - Quote StatusAdmin

▼

+ New

Search

Search

Reset

Active

Name	Description	Active
Closed	Closed without result	✓ <div>🔍✎🗑</div>
Converted	Converted to Invoice	✓ <div>🔍✎🗑</div>
Reviewed	Reviewed by manager	✓ <div>🔍✎🗑</div>
Pending	Awaiting response	✓ <div>🔍✎🗑</div>
Cancelled	Manually cancelled	✓ <div>🔍✎🗑</div>
Expired	Quote validity expired	✓ <div>🔍✎🗑</div>
Rejected	Customer rejected the quote	✓ <div>🔍✎🗑</div>
Accepted	Customer accepted the quote	✓ <div>🔍✎🗑</div>
Sent	Quote sent to customer	✓ <div>🔍✎🗑</div>
Draft	Quote In preparation	✓ <div>🔍✎🗑</div>
Total: 10		

+ Load more

Name

Description

CreateCancel

In **view** mode, it displays a finalized quote without editing capabilities.

SaltOSDashboardApplications

Detail - Quote StatusAdmin

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+ New

Search

Search

Reset

Active

Name	Description	Active
Closed	Closed without result	✓ <div>🔍✎🗑</div>
Converted	Converted to Invoice	✓ <div>🔍✎🗑</div>
Reviewed	Reviewed by manager	✓ <div>🔍✎🗑</div>
Pending	Awaiting response	✓ <div>🔍✎🗑</div>
Cancelled	Manually cancelled	✓ <div>🔍✎🗑</div>
Expired	Quote validity expired	✓ <div>🔍✎🗑</div>
Rejected	Customer rejected the quote	✓ <div>🔍✎🗑</div>
Accepted	Customer accepted the quote	✓ <div>🔍✎🗑</div>
Sent	Quote sent to customer	✓ <div>🔍✎🗑</div>
Draft	Quote In preparation	✓ <div>🔍✎🗑</div>
Total: 10		

+ Load more

Name

Closed


Description

Closed without result

Info


EditDeleteClose

In **edit** mode, it shows a draft quote ready for modification.



[Dashboard](#)
[Applications](#)

Modify - Quote Status



+ New

Search

Reset

Active

Name	Description	Active
Closed	Closed without result	<div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div>
Converted	Converted to invoice	<div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div>
Reviewed	Reviewed by manager	<div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div>
Pending	Awaiting response	<div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div>
Cancelled	Manually cancelled	<div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div>
Expired	Quote validity expired	<div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div>
Rejected	Customer rejected the quote	<div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div>
Accepted	Customer accepted the quote	<div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div>
Sent	Quote sent to customer	<div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div>
Draft	Quote in preparation	<div>✓</div> <div>🔍</div> <div>✎</div> <div>🗑</div>
Total: 10		

+ Load more

✓ Save

✗ Cancel

Name

Description

The form includes the following fields:

- **Active:** Toggles the visibility of this status in dropdowns.
- **Name:** Name of the status as it appears in the interface.
- **Description:** Optional explanation for internal reference.

Delete

Quote statuses can be deleted only if they are not currently in use.

Deactivation is preferred to preserve consistency in historical records.