

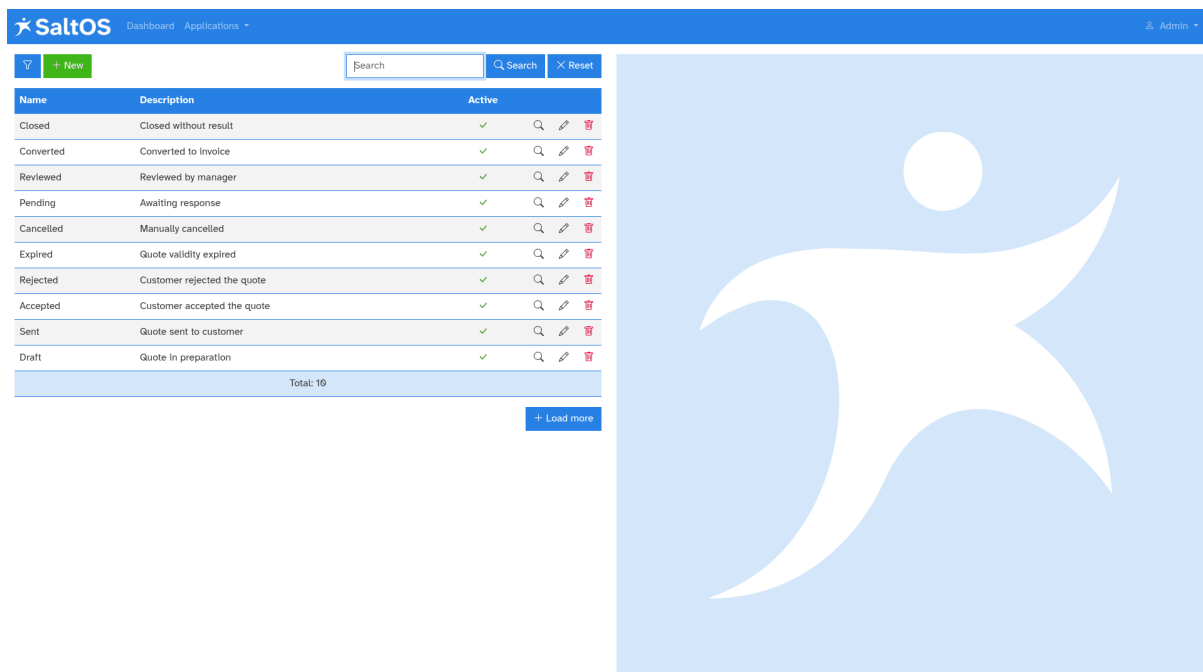
Quotes Status

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 Admin		
▼ + New	Search	Q Search X Reset
Name	Description	Active
Closed	Closed without result	✓ Q ✎ 🗑
Converted	Converted to invoice	✓ Q ✎ 🗑
Reviewed	Reviewed by manager	✓ Q ✎ 🗑
Pending	Awaiting response	✓ Q ✎ 🗑
Cancelled	Manually cancelled	✓ Q ✎ 🗑
Expired	Quote validity expired	✓ Q ✎ 🗑
Rejected	Customer rejected the quote	✓ Q ✎ 🗑
Accepted	Customer accepted the quote	✓ Q ✎ 🗑
Sent	Quote sent to customer	✓ Q ✎ 🗑
Draft	Quote in preparation	✓ Q ✎ 🗑
Total: 10		+ Load more

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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+ New

Search

Search

Reset

Active

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

+ Load more

Name

Description

Create

Cancel

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

SaltOSDashboardApplicationsAdmin

+ New

Search

Search

Reset

Active

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

+ Load more

Name

Closed

Description

Closed without result

Info

Edit

Delete

Close

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

Dashboard Applications

Admin

+ New

Search

Search

Reset

Active

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		

+ Load more

Name

Closed

Description

Closed without result

Save

Cancel

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.