Quotes statuses, notifications, and reporting 🔗
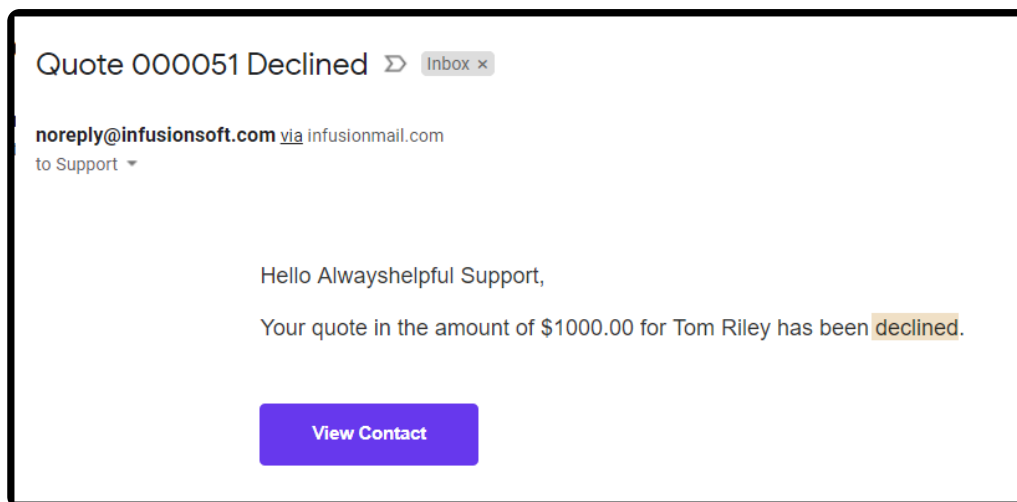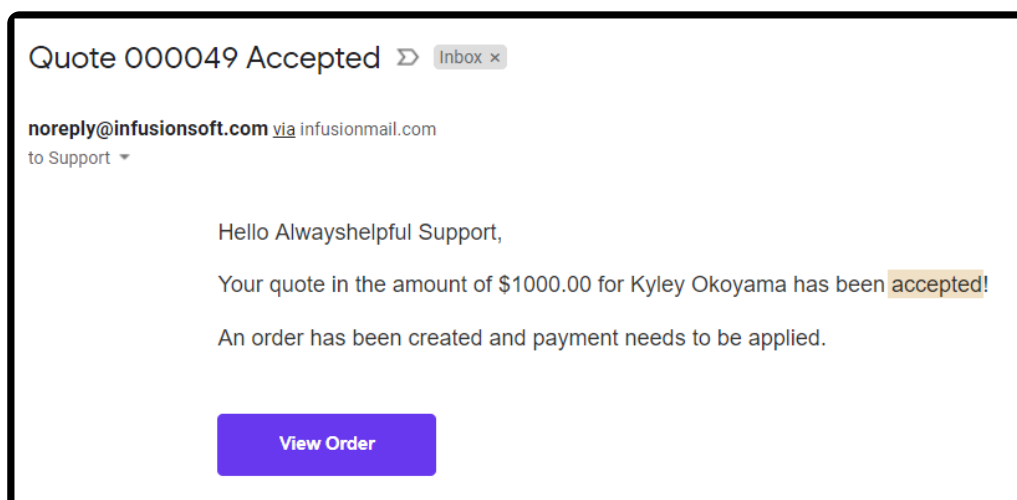
Notification Emails

A notification email is sent to the contacts owner when a quote is:
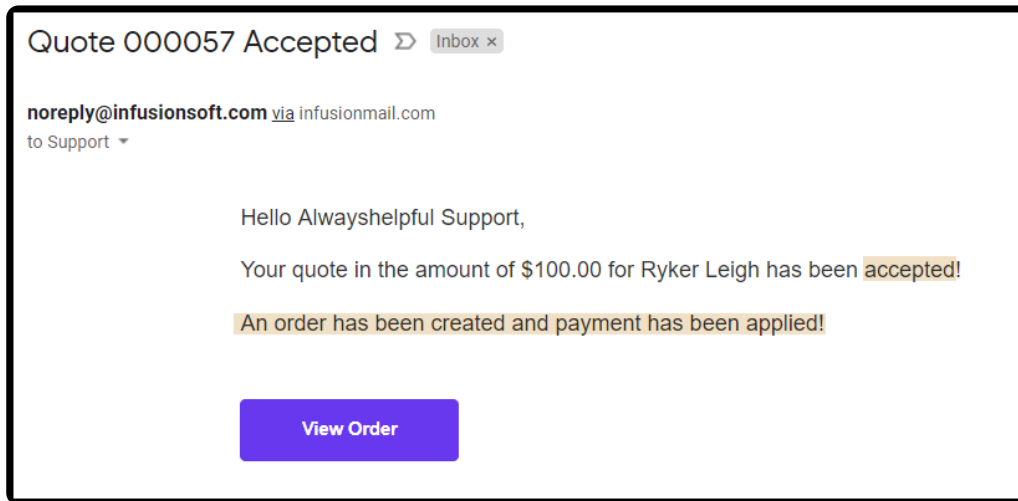
Declined

-

 Quote 000051 Declined ⅀ Inbox ×

  noreply@infusionsoft.com via infusionmail.com
  to Support ▾

  Hello Alwayshelpful Support,

  Your quote in the amount of $1000.00 for Tom Riley has been declined.

  View Contact

Accepted

-

  Quote 000049 Accepted ⅀ Inbox ×

  noreply@infusionsoft.com via infusionmail.com
  to Support ▾

  Hello Alwayshelpful Support,

  Your quote in the amount of $1000.00 for Kyley Okoyama has been accepted!

  An order has been created and payment needs to be applied.

  View Order

or Paid

-

  Quote 000057 Accepted ⤵ Inbox ×

  noreply@infusionsoft.com via infusionmail.com
  to Support ▾

  Hello Alwayshelpful Support,

  Your quote in the amount of $100.00 for Ryker Leigh has been accepted!

  An order has been created and payment has been applied!

  View Order

Quote statuses

If your customer declines the quote, their page is refreshed, the word "**Declined**" with the current date

-

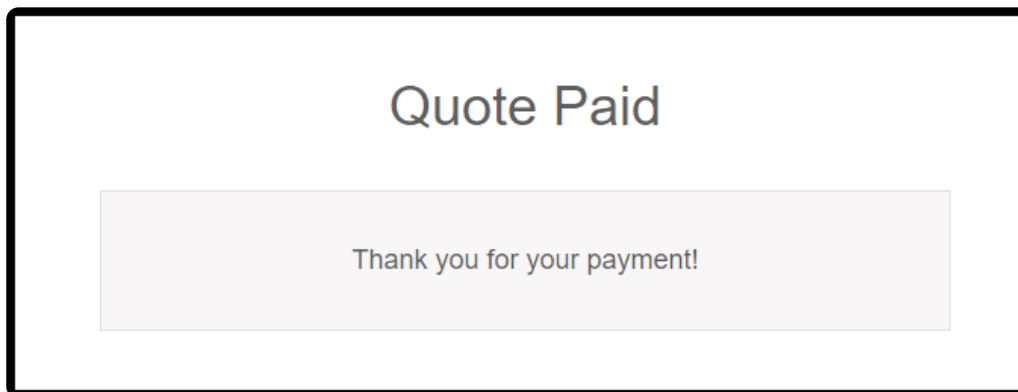 Declined on 3/8/19
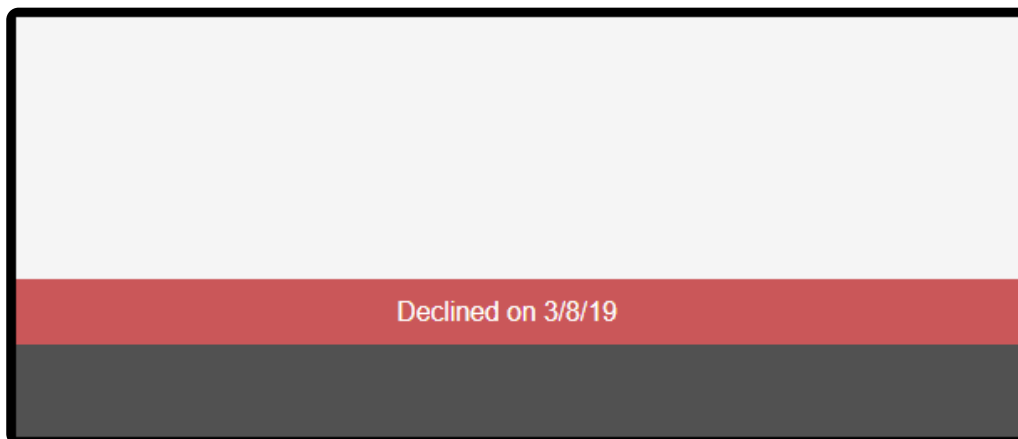
If your customer accepted the quote, they will see the word "**Accepted**" with the current date

-

Accepted on 3/8/19
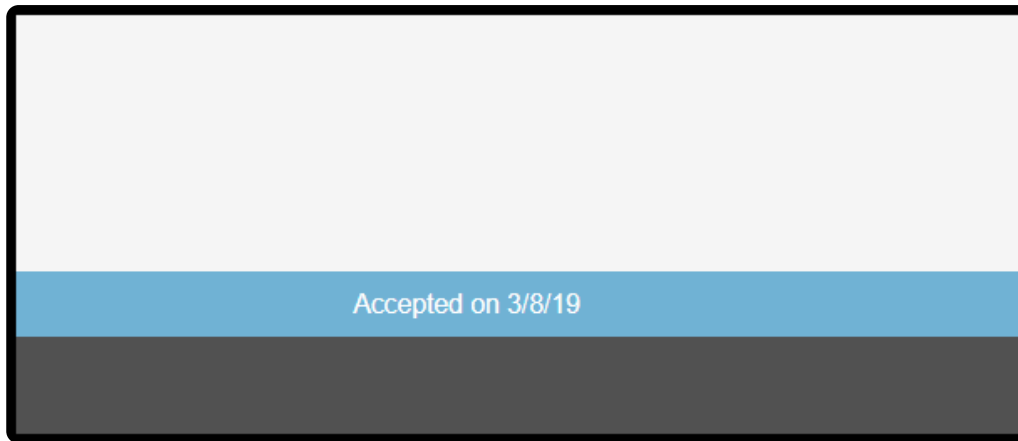
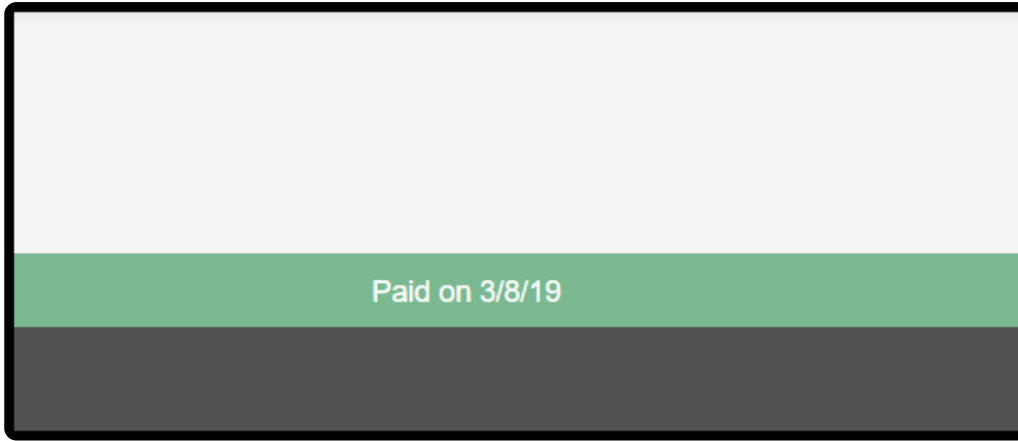If your customer pays immediately, the page is refreshed, and they will see "**Quote Paid - Thank you for your payment**"

-

Quote Paid

Thank you for your payment!

If your customer views the quote email again, and action has already been taken, then the bottom will display the status type and date of the action i.e. accepted, declined, and paid

-

Paid on 3/8/19

Accepted quotes are automatically converted into orders, and a balance is created within Infusionsoft by Keap. The payments must be recorded manually.

-

Quote Number	Amount	Status	Status Updated
000055	$1,000.00	● View Order	3/8/19

Recent Orders   [Add Order] [Qu...

Date	Link	Payment Plan	Status	Total	Paid	Balance
3/8/19	Order From Quote 000055	Has A Payment Plan	No Refund Issued	$1,000.00	$0.00	$1,000.00

Any action taken on a quote will update the status, which include: draft, sent, viewed, declined, and view order.

-

Status

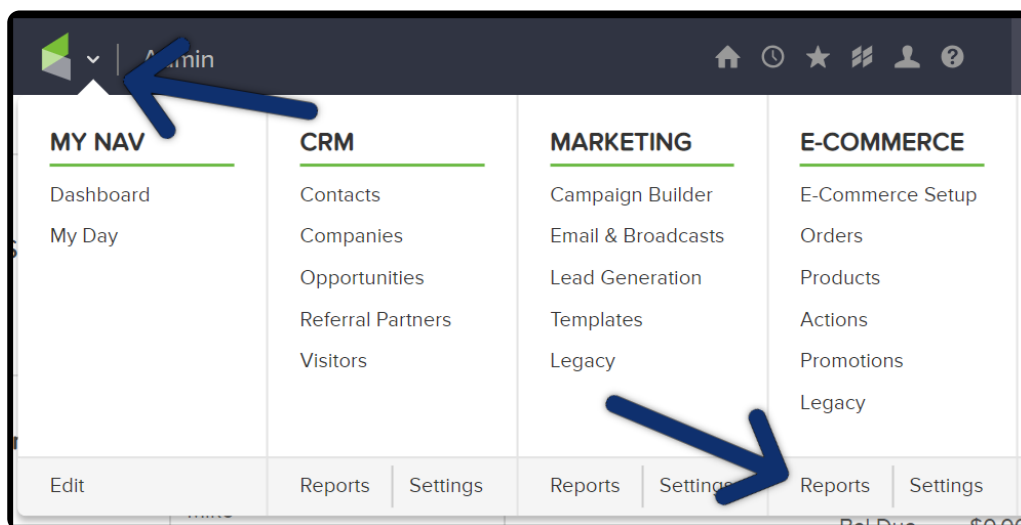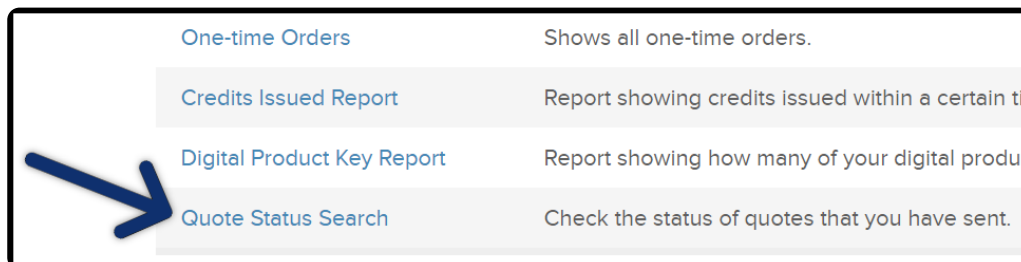● Draft

● Sent

● Viewed
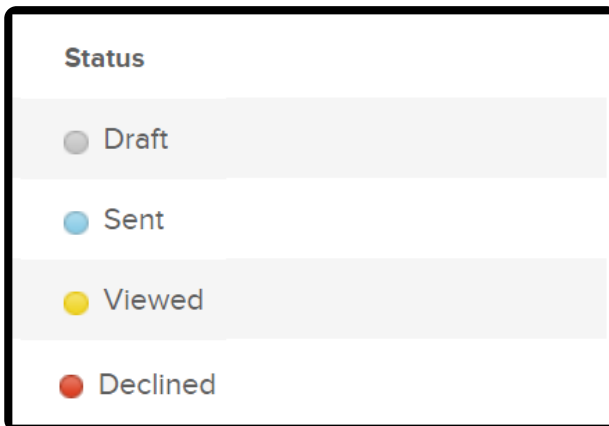
● Declined

> **Note**: Once a quote is created, it cannot be deleted and once it is accepted, it cannot be changed. If the quote is declined you can make changes but cannot delete the quote.
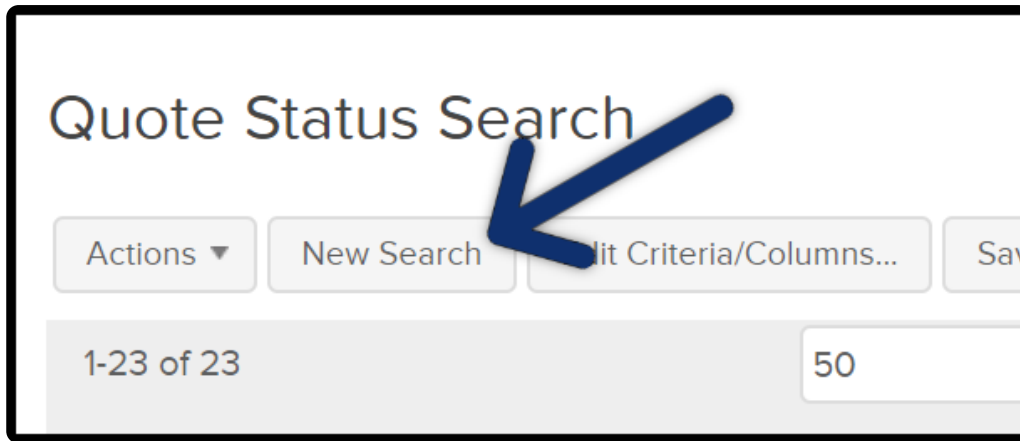
Quote reporting

1. Go to E-Commerce > Reports

2. Scroll all the way down to "**Quote Status Search**"

3. Click "**New Search**"

Search Criteria

- Quote Id
- First Name
- Last Name
- Quote Status
- Total
- Quote Sent Email

Quote Status Search

Search	Columns

Search Criteria

Quote Id [|]

First Name [ ]

Last Name [ ]

Quote Status [contains any ▼]

```
Draft
Sent
Viewed
Accepted and Unpaid
Accepted
Declined
Paid
```

Total [0.00] $ - [0.00] $

Quote Sent Email [ ]

[Search] [Reset Filters]

Note: **Quote Sent Email** - regardless of what email the quote was sent to, it will ALWAYS be associated with the contact record the quote was sent from.

Contact Name	Sent to emails
Zac Leight	DonTSmith@alwayshelpful.org
Mike Fusion	
Mike Fusion	mike.fusion@yahoo.com

Columns Available Fields:

- Title
- Contactid
- Total
- Status
- Sent to emails
- Quote Id - clicking will open a new window with the quote preview
- Contact Name
- First Name
- Last Name

Quote Status Search

Search | **Columns**

Customize Columns on Search Results

Custom Columns:

Title	∧ ∨ ✕
Contactid	∧ ∨ ✕
Total	∧ ∨ ✕
Status	∧ ∨ ✕
Sent to emails	∧ ∨ ✕
Quote Id	∧ ∨ ✕

Available Fields:

Contact Name
First Name
Last Name

«

Sort By: Quote Id Descending ▾   Then By: Please select one ▾

Search   Reset Filters

Report example

-

Quote Status Search

Actions ▾ | New Search | Edit Criteria/Columns... | Save... | Print... | No options available ▾

1-23 of 23   50 ▾ per page

☐	Title	Contactid	Total	Status	Sent to emails	Quote Id
☐	000061	82262	$20.00	DRAFT		61
☐	000059	82262	$1,000.00	SENT	mike.fusion@yahoo.com	59
☐	000057	82395	$100.00	PAID	rahha_kera8@yahoo.com	57
☐	000055	82399	$1,000.00	ACCEPTED	xez.leight@gmail.com	55
☐	000053	81768	$1,000.00	DECLINED	funinrain888@yahoo.com	53