Quotes Table

The Quotes table is used to create purchase quotes for prospects or existing customers. It can be used independently, or within the Opportunities table. If you use Quotes as your primary way of indicating potential sales value, Agiloft offers preconfigured reports for the Quotes table that will forecast your sales over the next period and will report on past success rates. If you do not use Quotes, you can run these kinds of reports from the Opportunities table instead, using fields such as estimated Sale Value, Probability of Sale, and Expected Close Date to track the value of potential sales. Quotes include a related table of links from Products Quoted, listed under the Quoted Items header of the Quote tab.

Use Case

Read the following sections to learn about use cases for creating and processing Quote records.

Creating Quote Records

A quote record is created with a default Status of Prepared. Upon saving the record, the quote is attached as a PDF to the record through an Attachment action. If a new quote is saved with a status of Sent to Customer, the quote is emailed to the prospect.
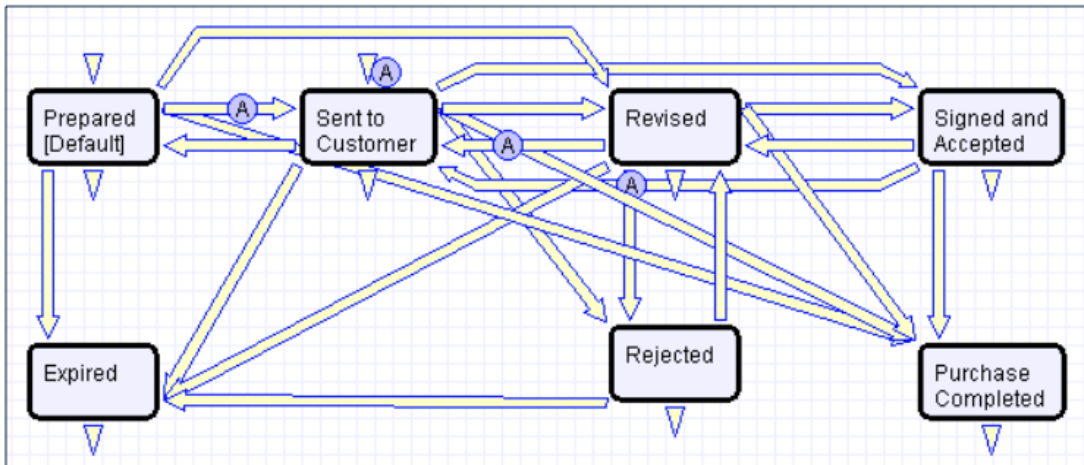
Processing Records

If the record is created and the Status is Prepared, the status can be changed to any one of the following states: Sent to customer, Expired, Revised, and Purchase Completed. If the status is changed to Sent to Customer at any time, a quote with the attached PDF will be emailed to the prospect.

Ownership

Quotes are owned by the Sales Rep who prepares them. Specifically, a Quote is owned by the user whose Full Name matches the name in the Quote Prepared By field.

Workflow

The Quotes table has the following default workflow:

Automation

A: Attach Quote as PDF

E: Email prospect attached quote

These actions occur when a Quote is created in a Status of Sent to Customer or when the Status changes from any value to Sent to Customer

Reports

The Quotes table contains eight default Charts/Reports:

	Edit	View	Title ↑	Filter	Published	Date Updated	Output Format	Type of Report
☐	✎	🔍	Completed Purchases in Past Year	Purchased Quotes	Yes	Nov 26 2018 16:48	Graphical chart, HTML	Standard
☐	✎	🔍	Forecast 6 months, bar for each rep	Purchased Quotes	No	Nov 26 2018 16:48	Graphical chart, HTML	Standard
☐	✎	🔍	Forecast 6 months, runtime by rep	Purchased Quotes	No	Nov 26 2018 16:48	Graphical chart, HTML	Standard
☐	✎	🔍	Open Quotes value by Company	C: Quote status is not Rejected or Purchased	No	Nov 26 2018 16:49	Graphical chart, HTML	Standard
☐	✎	🔍	Open Quotes Value by Sales Rep	C: Quote status is not Rejected or Purchased	No	Nov 26 2018 16:49	Graphical chart, HTML	Standard
☐	✎	🔍	Open Quotes Value by Status	C: Quote status is not Rejected or Purchased	No	Nov 26 2018 16:49	Graphical chart, HTML	Standard
☐	✎	🔍	Purchases Completed Last Month	Purchased Quotes	No	Nov 26 2018 16:50	Graphical chart, HTML	Standard
☐	✎	🔍	Quotes by Preparer		Yes	Nov 26 2018 16:50	Graphical chart, HTML	Standard