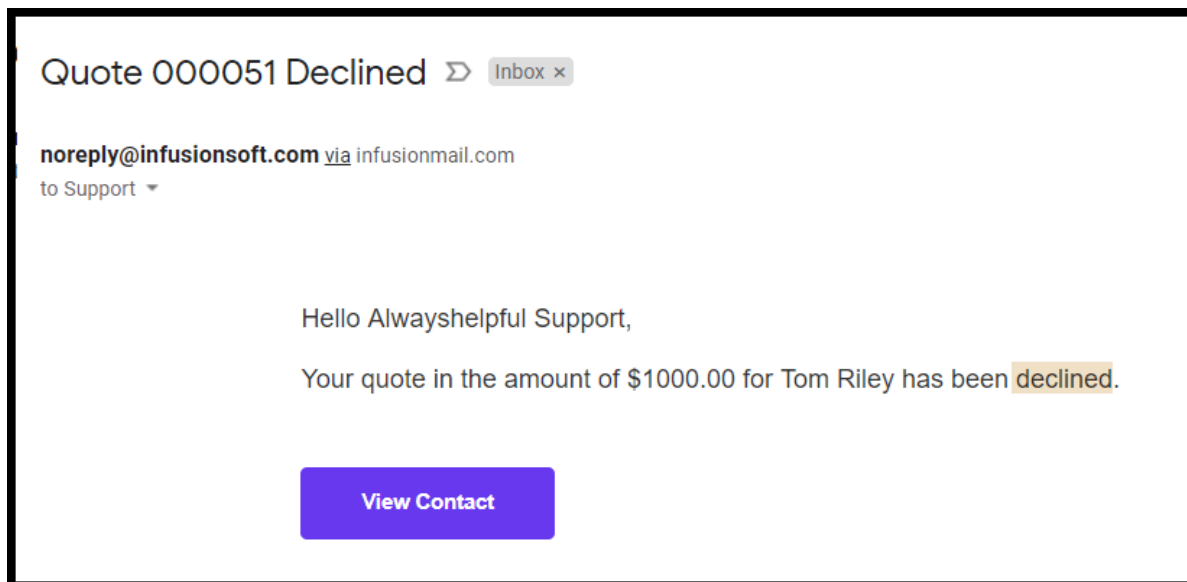


# Quotes statuses, notifications, and reporting 🔗

## Notification Emails

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

Declined



Accepted



Quote 000049 Accepted Σ 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 Σ 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!**

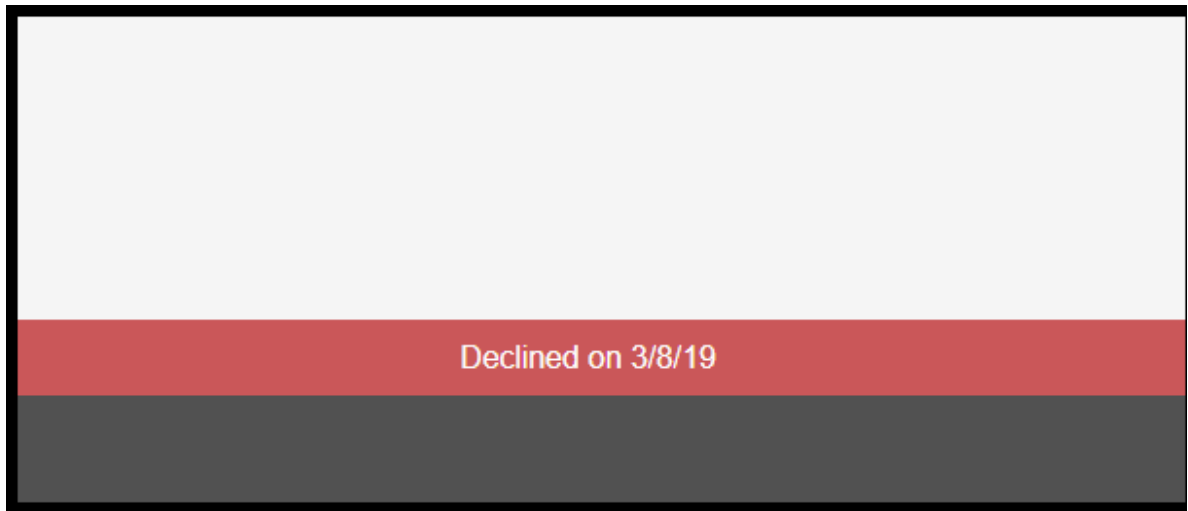
**An order has been created and payment has been applied!**

[View Order](#)

### Quote statuses

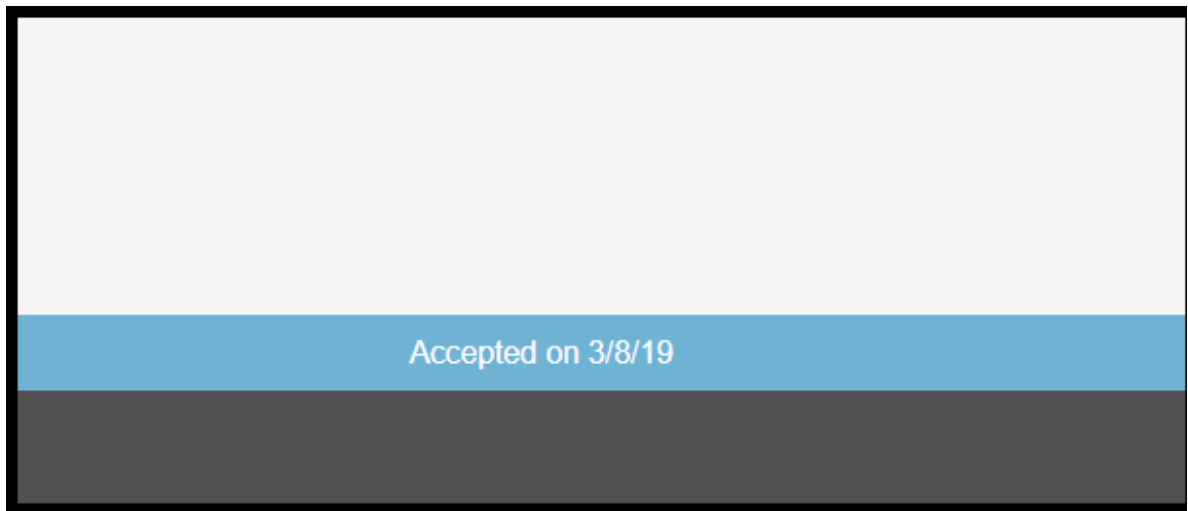
If your customer declines the quote, their page is refreshed, the word “ **Declined**” with the current date

-



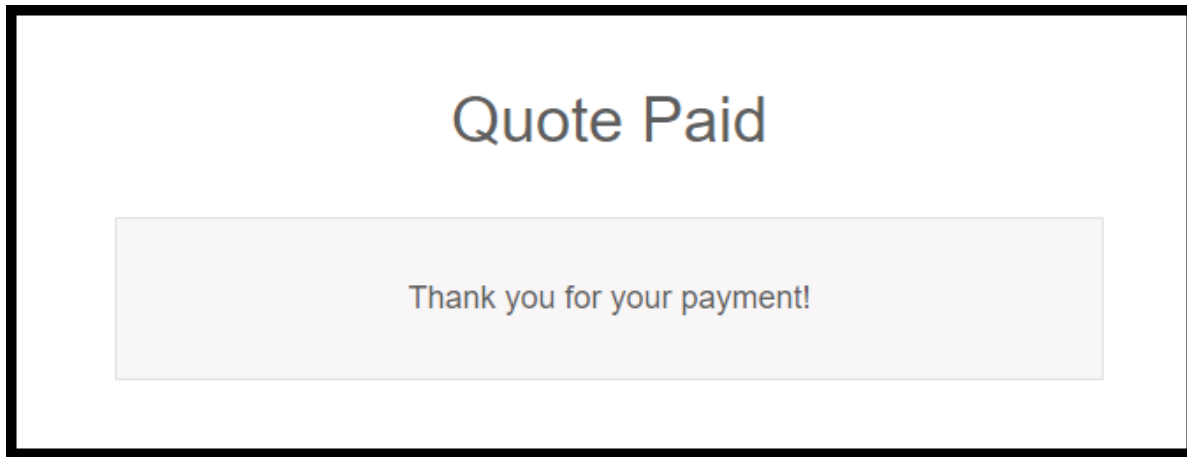
If your customer accepted the quote, they will see the word "Accepted" with the current date

- 



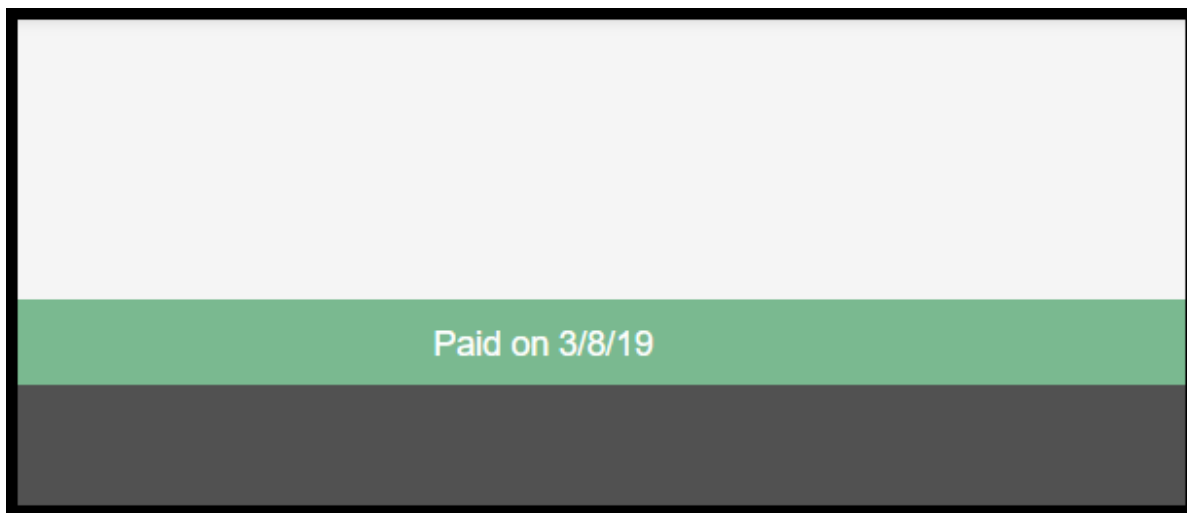
If your customer pays immediately, the page is refreshed, and they will see "Quote Paid - Thank you for your payment"

-



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

- 



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

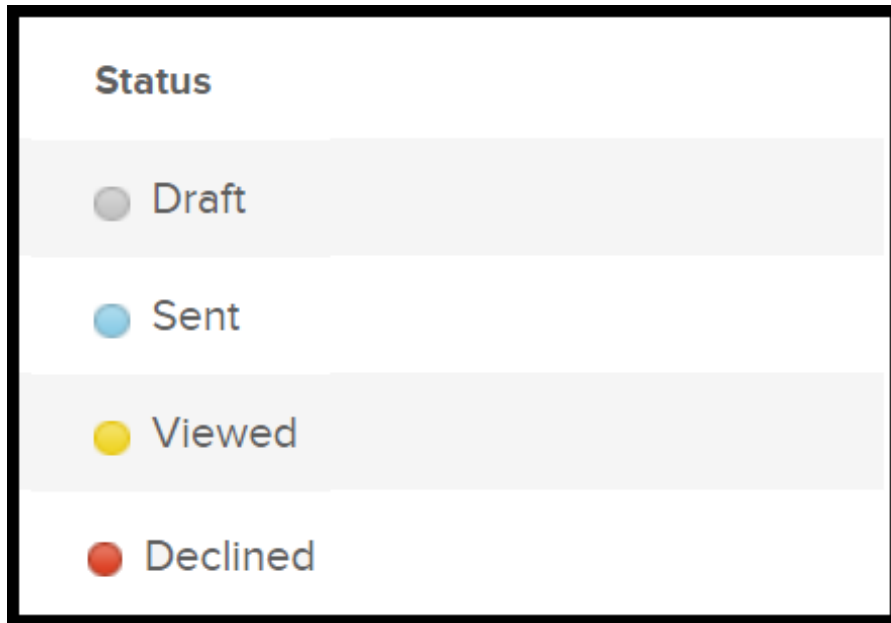
- 

Quote Number	Amount	Status	Status Updated
000055	\$1,000.00	<span>View Order</span>	3/8/19

**Recent Orders** Add Order Qu

Date	Link	Payment Plan	Status	Total	Paid	Balance
3/8/19	<a href="#">Order From Quote 000055</a>	Has A Payment Plan	No Refund Issued	\$1,000.00	\$0.00	\$1,000.00

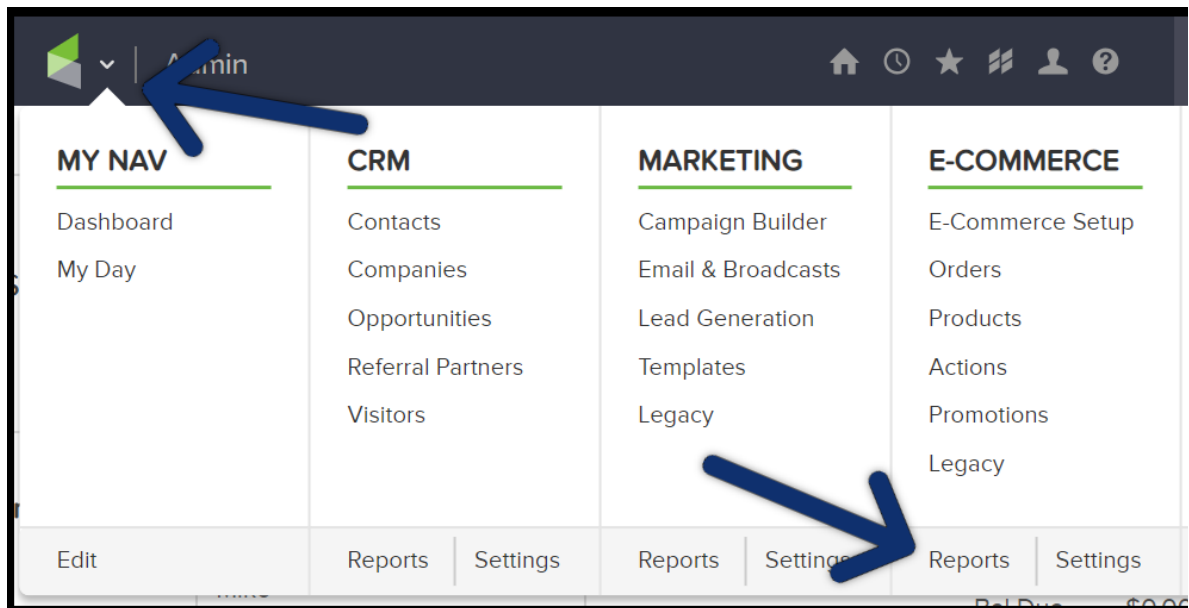
Any action taken on a quote will update the status, which include: draft, sent, viewed, declined, and view order.



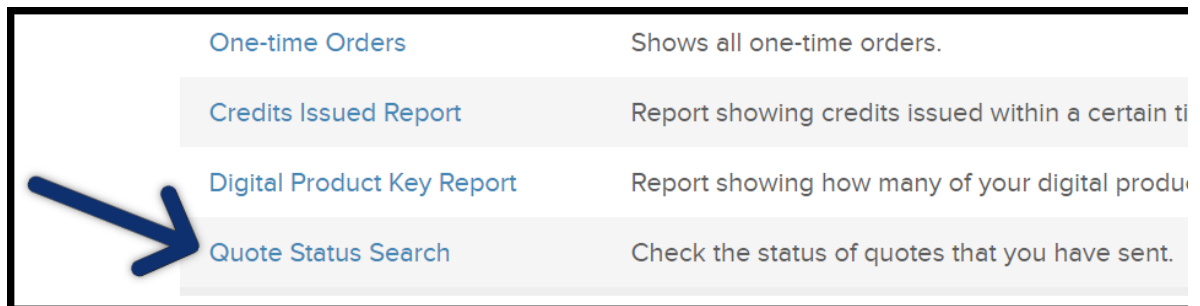
**Note:** Once a quote is created, it cannot be deleted and once it is accepted, it cannot be changed. If the quote is declined you can make changes but cannot delete the quote.

## Quote reporting

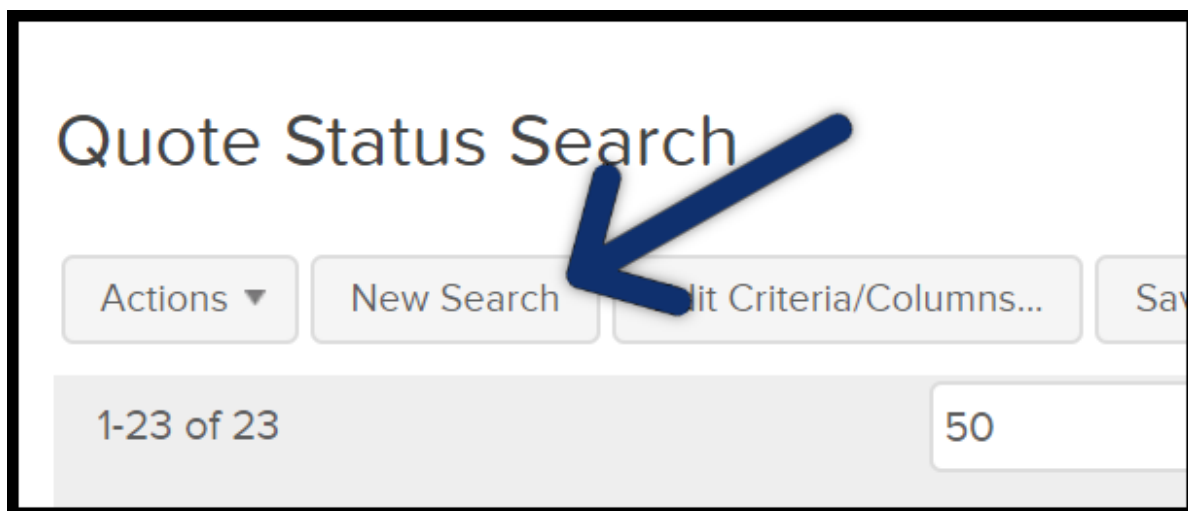
1. Go to E-Commerce > Reports



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

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

Total  \$ -  \$

Quote Sent Email

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	^	v	x
Contactid	^	v	x
Total	^	v	x
Status	^	v	x
Sent to emails	^	v	x
Quote Id	^	v	x

### 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

<input type="checkbox"/>	Title	Contactid	Total	Status	Sent to emails	Quote Id
<input type="checkbox"/>	000061	82262	\$20.00	DRAFT		61
<input type="checkbox"/>	000059	82262	\$1,000.00	SENT	mike.fusion@yahoo.com	59
<input type="checkbox"/>	000057	82395	\$100.00	PAID	rahha_kera8@yahoo.com	57
<input type="checkbox"/>	000055	82399	\$1,000.00	ACCEPTED	hez.leight@gmail.com	55
<input type="checkbox"/>	000053	81768	\$1,000.00	DECLINED	funinrain888@yahoo.com	53

