

Quotes statuses, notifications, and reporting

This article applies to:

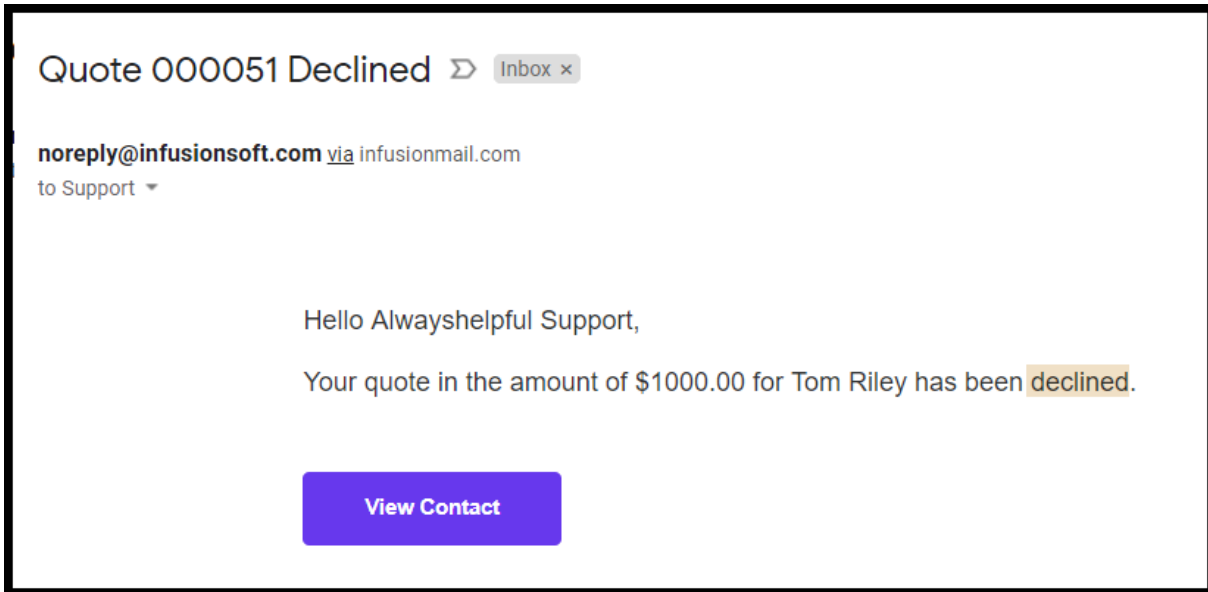
[Max Classic](#)

Notification Emails

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

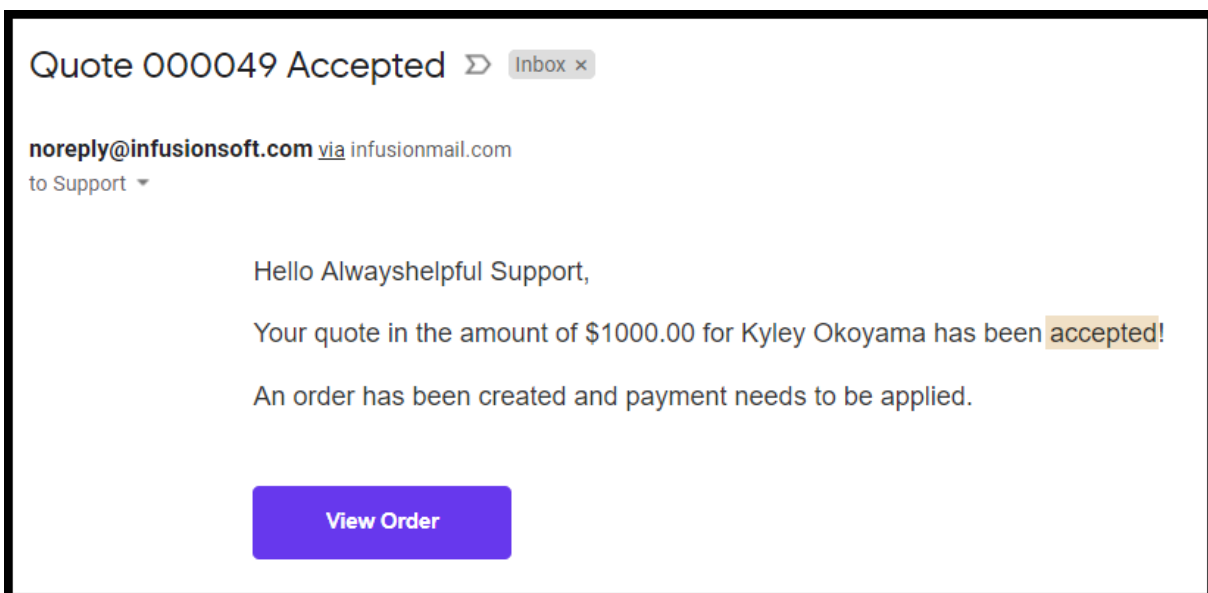
Declined

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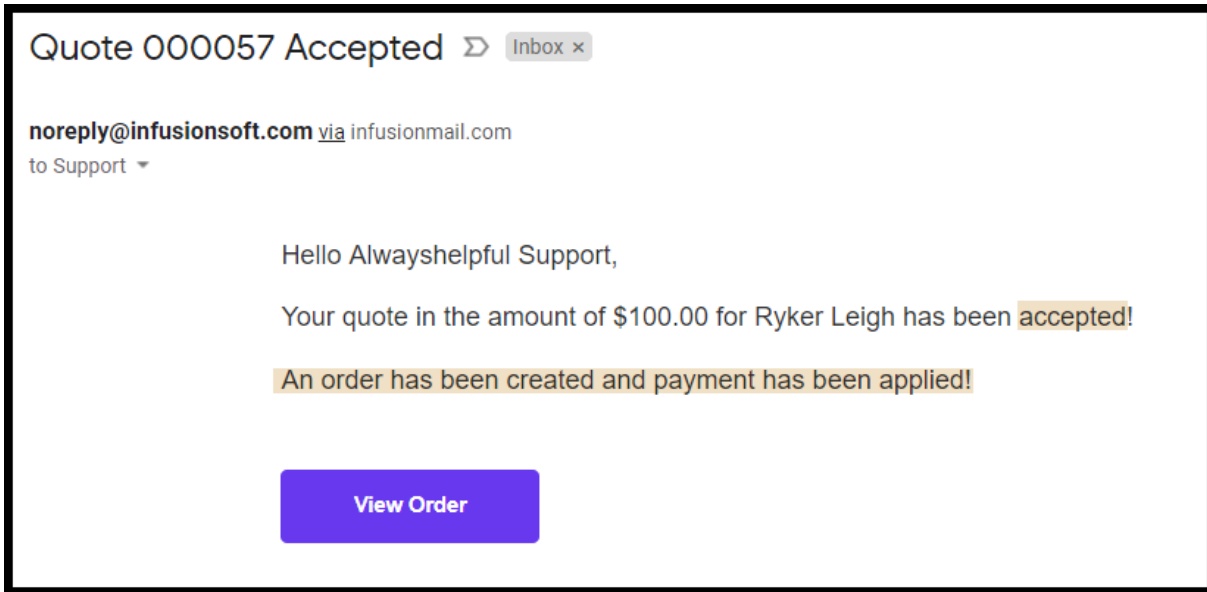


Accepted

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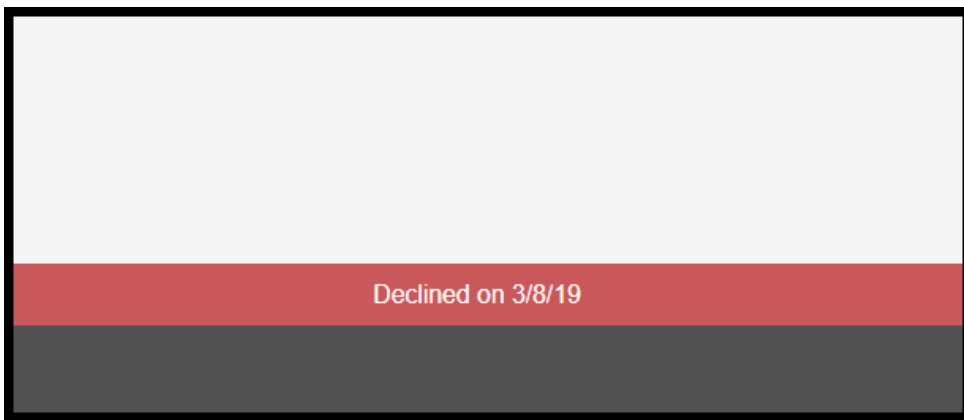


or Paid

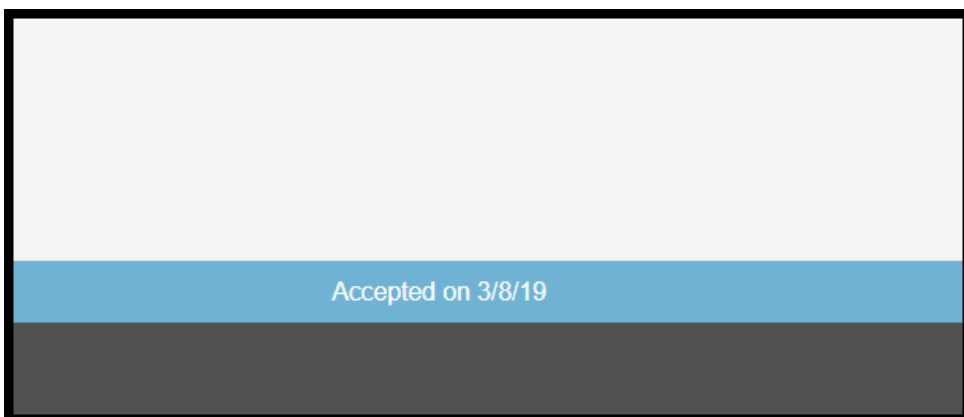


Quote statuses

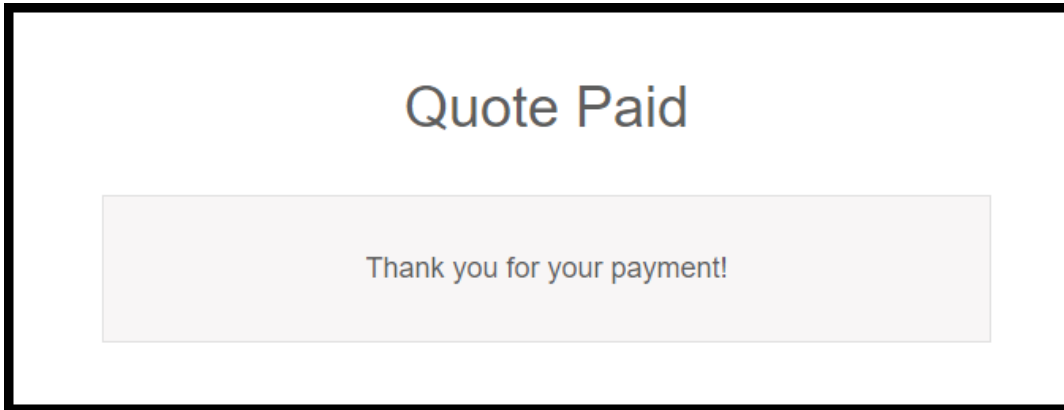
If your customer declines the quote, their page is refreshed, the word “ Declined” with the current date



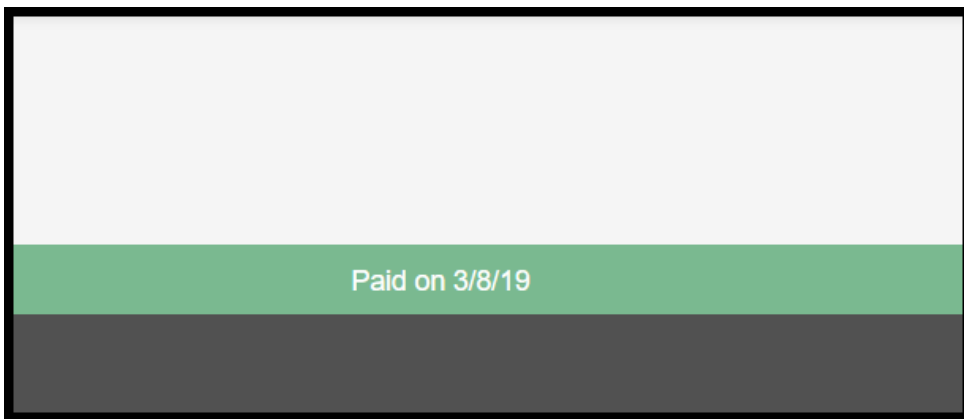
If your customer accepted the quote, they will see the word “ Accepted” with the current date



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



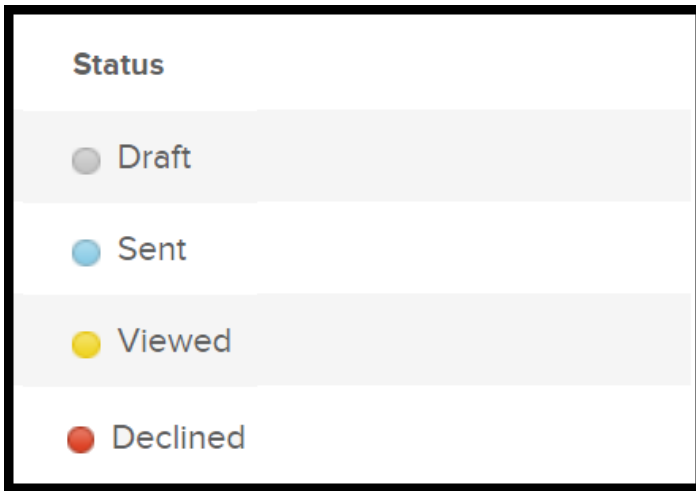
Accepted quotes are automatically converted into orders, and a balance is created within Max Classic. The payments must be recorded manually.

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

Recent Orders Add Order Qui

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

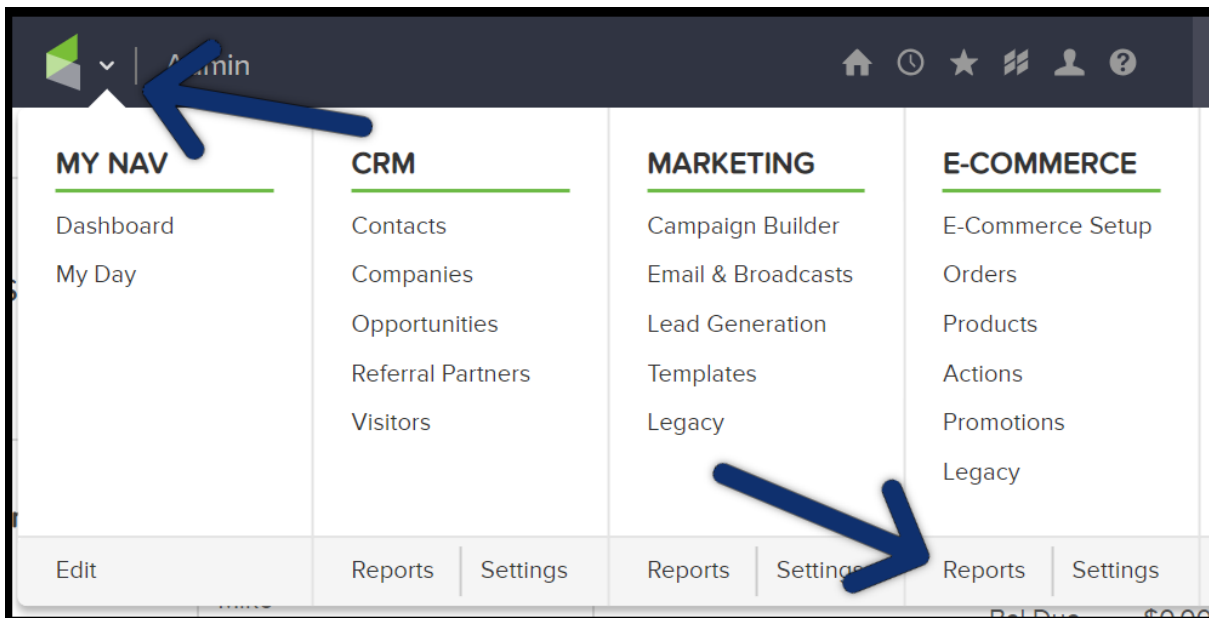
Any action taken on a quote will update the status, which include: draft, sent, viewed, declined, and view order.



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"

One-time Orders	Shows all one-time orders.
Credits Issued Report	Report showing credits issued within a certain ti
Digital Product Key Report	Report showing how many of your digital produc
Quote Status Search	Check the status of quotes that you have sent.

3. Click "New Search"

Quote Status Search

Actions ▾ New Search Edit Criteria/Columns... Save

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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

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

The screenshot displays the 'Quote Status Search' interface. At the top, there are two tabs: 'Search' and 'Columns'. Below the tabs is the heading 'Customize Columns on Search Results'. The interface is divided into two main sections: 'Custom Columns:' and 'Available Fields:'. The 'Custom Columns:' section contains a list of six items: 'Title', 'Contactid', 'Total', 'Status', 'Sent to emails', and 'Quote Id'. Each item has a blue up arrow, a blue down arrow, and a red 'x' icon to its right. The 'Available Fields:' section contains a list of three items: 'Contact Name', 'First Name', and 'Last Name'. A double left arrow icon is positioned between the two sections. Below these sections are two dropdown menus: 'Sort By: Quote Id Descending' and 'Then By: Please select one'. At the bottom, there are two buttons: a green 'Search' button and a white 'Reset Filters' button.

Report example

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Quote Status Search

Actions ▾

New Search

Edit Criteria/Columns...

Save...

Print...

No options available ▾

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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	xez.leight@gmail.com	55
<input type="checkbox"/>	000053	81768	\$1,000.00	DECLINED	funinrain888@yahoo.com	53