

Quotes

Quotes

Purpose and when to use this record

Prepare a customer estimate, track its approval status, and convert accepted lines and totals into a sale.

At a glance

- **Identify it by:** **Quote #**, and **Status**.
- **Check its business context:** **Customer**, **Salesperson**, and **Warehouse**.
- **Why care:** Customer, warehouse, quantities, prices, tax, payment, and fulfillment represent different parts of the transaction. Review each before treating the sale as complete.
- **Why care:** Status communicates workflow progress to other staff. Change it only when the underlying work, approval, payment, or handoff has actually occurred.

Before you begin

You need the Brisk permission for the action you are taking on quotes. If a Create, Edit, or Delete control is absent, do not work around it with another user's account; ask an administrator to review your role.

Have valid **Customer** records ready first. Those selections determine where this quote belongs and which later screens can find it.

Create a quote

Create a quote only after confirming that the source document or operational event has not already been entered.

1. Select the business context first: **Customer**, **Salesperson**, and **Warehouse**.

2. Enter the required identifying and operational values: **Quote #**, and **Customer**.
3. Review **Status**, and **Converted** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the quote, then confirm **Quote #**, and **Status** on its detail page before continuing.

After saving: Send the estimate for approval and convert it only once; after conversion, use the resulting sale as the operational record.

Delete a quote

Delete this quote only when it was entered by mistake and no downstream history depends on it. Use a reversal, void, credit, counter-adjustment, or status correction for a real event that later changed.

Before confirming, check for related **Quote Rows**, **Quoted Sales**, **Service Leads**, and **Service Orders**. Brisk may refuse deletion when another record depends on this one; resolve the duplicate or use the supported correction workflow instead of breaking the trail.

On the confirmation page, verify **Quote #**, and **Status**. After confirmation, return to the Quotes list and make sure only the intended quote was removed.

Review quote details

Use the detail page as the shared record of what this quote currently means. Verify **Status**, **Subtotal**, **Tax Total**, and **Total** before relying on it for a decision.

Follow **Customer**, **Salesperson**, and **Warehouse** to determine whether the issue is on this quote or on one of those linked records.

Next check: Send the estimate for approval and convert it only once; after conversion, use the resulting sale as the operational record.

Edit an existing quote

Edit this quote to correct or complete the same source document or operational event; use the supported reversal or follow-up workflow when the business event itself changed.

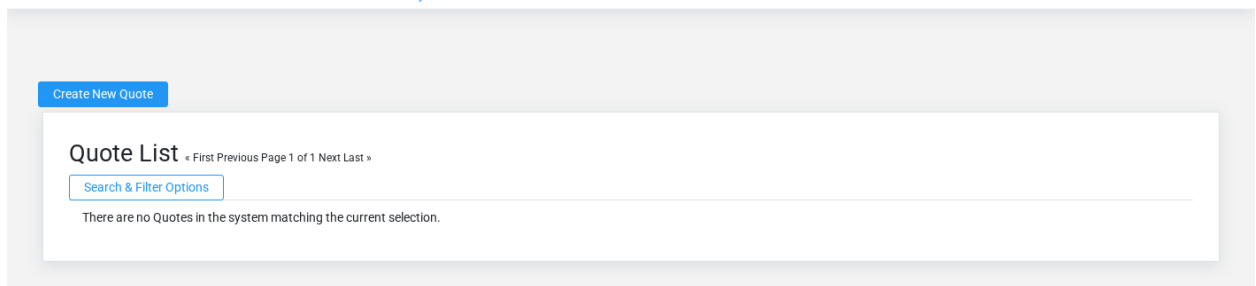
1. Open the detail page. Compare **Customer**, **Salesperson**, and **Warehouse** with the supporting document or approved request.
2. Recheck **Customer**, **Warehouse**, **Status**, **Customer Po #**, **Subtotal**, and **Tax Total**, plus the remaining screen fields. These values are most likely to change customer totals,

tax, payment, fulfillment, and receivables.

3. Save the change, return to the list, and confirm that the quote now appears under the expected **Status**.

After the change: Send the estimate for approval and convert it only once; after conversion, use the resulting sale as the operational record.

Find and review quotes



The Quotes list screen in the Brisk documentation demo.

Use the Quotes list to find the correct record before opening or changing it. Compare **Quote #**, and **Status**. Records with similar names or numbers can still belong to different **Customer**, **Salesperson**, and **Warehouse**.

Open the quote whose **Quote #**, and **Status** match the task. If it is missing, clear the list filters and recheck **Status** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 11 user-relevant fields for this quote, including 3 linked-record selections and 1 controlled-choice field. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Quote #	Yes	A quote's friendly name, used to identify the transaction in lists, reports, and searches.
Customer	Yes	The customer that will be receiving this quote.
Salesperson	No	The salesperson assigned to this quote.
Warehouse	No	The physical location from which inventory items for this quote would be sourced.

Field	Required	What it controls
Status	No	Current status of this quote. Available values: Draft, Out to Customer, Approved, Rejected.
Memo	No	An optional field to record notes and other information about this quote.
Customer Po #	No	An optional field to make note of the customer's purchase order number.
Subtotal	No	The total sales price of all line items before sales tax.
Tax Total	No	The total sales tax due for this sale.
Total	No	The total value recorded for this quote.
Converted	No	Marks this quote as converted to an invoice and completed.

What happens next

Send the estimate for approval and convert it only once; after conversion, use the resulting sale as the operational record.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Quote #**, and **Customer** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The record saved but is not available where expected:** Recheck **Status**, then clear the filters on the destination list. A saved record can still be inactive, unpublished, locked, unapproved, or in the wrong workflow state.
- **The values look right but the result is wrong:** Open **Customer**, **Salesperson**, and **Warehouse** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

Revision #3

Created 2026-08-10 16:09:39 UTC by Brisk

Updated 2026-08-10 20:30:02 UTC by Brisk