

Service Quotes

Service Quotes

Purpose and when to use this record

Estimate service scope, parts, labor, tax, and total before customer approval and conversion to a service order.

At a glance

- **Identify it by:** **Service Quote #**, and **Status**.
- **Check its business context:** **Customer**, **Equipment**, **Lead**, **Type**, and **Warehouse**.
- **Why care:** Customer, equipment, scope, priority, technician availability, parts, labor, and status must stay aligned from intake through billing.
- **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 service 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.

Create a Service Quote

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

1. Select the business context first: **Customer**, **Equipment**, **Lead**, **Type**, and **Warehouse**.
2. Enter the required identifying and operational values: **Service Quote #**.
3. Review **Status**, **Priority**, and **Converted** deliberately; these choices control availability or workflow rather than merely describing the record.

4. Save the Service Quote, then confirm **Service Quote #**, and **Status** on its detail page before continuing.

After saving: Obtain customer approval before conversion, then manage parts, labor, dispatch, and completion on the resulting service order.

Delete a Service Quote

Delete this Service 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 **Service Orders**, and **Service Quote Rows**. 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 **Service Quote #**, and **Status**. After confirmation, return to the Service Quotes list and make sure only the intended Service Quote was removed.

Review Service Quote details

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

Follow **Customer**, **Equipment**, **Lead**, **Type**, and **Warehouse** to determine whether the issue is on this Service Quote or on one of those linked records.

Next check: Obtain customer approval before conversion, then manage parts, labor, dispatch, and completion on the resulting service order.

Edit an existing Service Quote

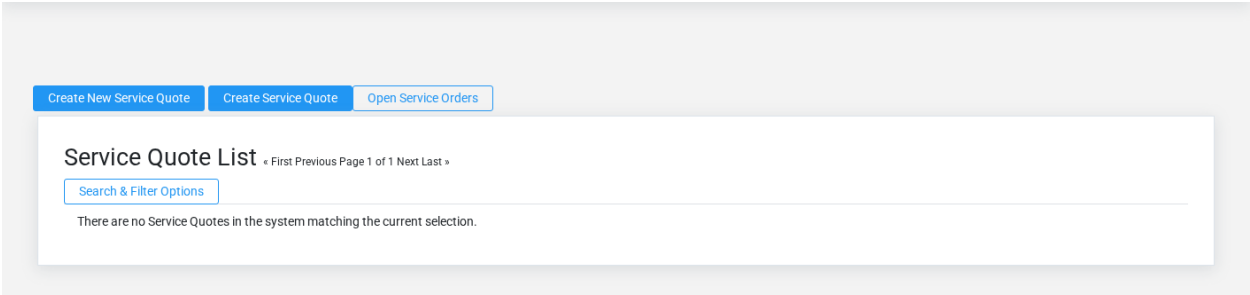
Edit this Service Quote to correct or complete the same source document or operational event; use the supported reversal or follow-up workflow when the business event itself changed.

1. Open the detail page. Compare **Customer**, **Equipment**, **Lead**, **Type**, and **Warehouse** with the supporting document or approved request.
2. Recheck **Customer**, **Status**, **Priority**, **Warehouse**, **Subtotal**, and **Tax Total**, plus the remaining screen fields. These values are most likely to change intake, estimating, dispatch, parts, labor, completion, and billing.

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

After the change: Obtain customer approval before conversion, then manage parts, labor, dispatch, and completion on the resulting service order.

Find and review service quotes



The Service Quotes list screen in the Brisk documentation demo.

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

- Keyword search checks **Service Quote #**, **Summary**, **Memo**, **Display Name**, **Lead #**, and **Service Order #**.
- Narrow the list with **Customer**, **Equipment**, **Lead**, and **Type** filters.
- The initial order emphasizes **Created At**. Select a column heading when you need a different comparison.

Open the Service Quote whose **Service Quote #**, and **Status** match the task. If it is missing, clear the list filters and recheck **Customer**, **Equipment**, **Lead**, **Type**, **Status**, and **Priority** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 14 user-relevant fields for this Service Quote, including 5 linked-record selections and 2 controlled-choice fields. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Service Quote #	Yes	Friendly number shown on service estimates and approvals.

Field	Required	What it controls
Customer	No	Links this Service Quote to the selected Customer; verify the relationship before saving.
Equipment	No	Links this Service Quote to the selected Equipment; verify the relationship before saving.
Lead	No	Optional source lead for this service quote.
Status	No	Current status of this service quote. Available values: Draft, Out to Customer, Approved, Rejected.
Priority	No	The priority recorded for this service quote. Available values: Low, Normal, High, Urgent.
Type	No	Optional service category for this quote.
Warehouse	No	Warehouse used when the quote is converted into service work.
Summary	No	Short customer-facing scope summary.
Memo	No	Notes and scope details for this service quote.
Subtotal	No	The sub total value recorded for this service quote.
Tax Total	No	The tax total value recorded for this service quote.
Total	No	The total value recorded for this service quote.
Converted	No	Marks this service quote as converted to a service order.

What happens next

Obtain customer approval before conversion, then manage parts, labor, dispatch, and completion on the resulting service order.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Service Quote #** 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**, and **Priority**, 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**, **Equipment**, **Lead**, **Type**, and **Warehouse** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.
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