Making and sending a Quote

A Quote is a firm price the customer can accept online. It is built from your price book.

Steps

1. Open the job and start a Quote, or open Quotes.
2. Add services, parts and labor from your price book. HQ adds it up.
3. Check it and press Send. The customer gets a link to read it and say yes.

Good to know

Every Quote has an expiry date. A firm price with no end is a promise nobody can keep.

Once sent, a Quote is not edited in place. A change makes a new version.

https://orshihq.com/help/make-and-send-quote