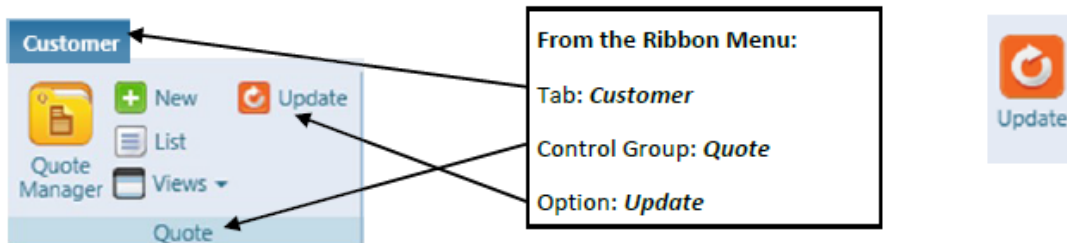# ASICOMP.COM

How Do You Track a Quote?

Tammy Mason - 2022-07-20 - in Quotes, Orders & Invoices

How Do You Track a Quote?

Activities can be created and assigned to Quote Resources. These are separate from Order Activities and will not carry over to the order. The activities will be available for viewing and updating from the Tracking View of the Quote in addition to the Quote Tracking Update list.

The same options are available for Quote Tracking as there are for Order Tracking. This includes activity types, the ability to setup different processes and to assign default processes for the customer, vendor, and quote that will be added when a new quote is created.


How Do You Setup an Activity?
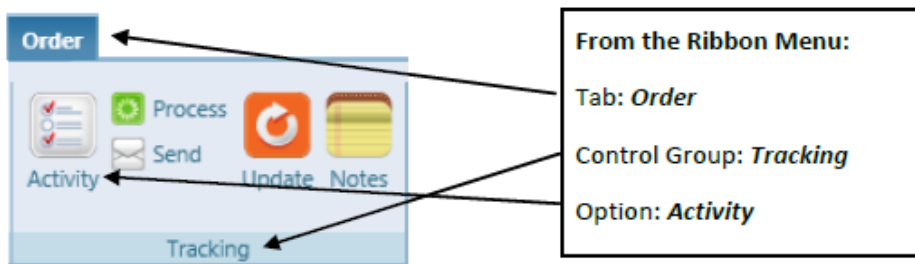
Activity Type: Customer, Vendor, and Quote types will be available on the Quote resource and Quote Tracking.

Order types will not be available on the quote resource.

Control Type: Date, Textbox, Checkbox, and Combobox are the available control types.

- A date control will take a date such as 01/15/15. This allows you to set a date for an activity to be due or set a date to show an activity as done.
- A textbox control is an open text field to enter values up to 50 characters
- A checkbox allows the user to click into the activity box and see a checkmark symbol or click into the activity again and see a small unchecked box.
- A combo box allows an activity to be setup with select options. By limiting the options, you can control the data entered into the cells so it can be grouped or filtered easily.

How Do You Setup a Process?

From the Ribbon Menu:

Tab: *Order*

Control Group: *Tracking*

Option: *Process*
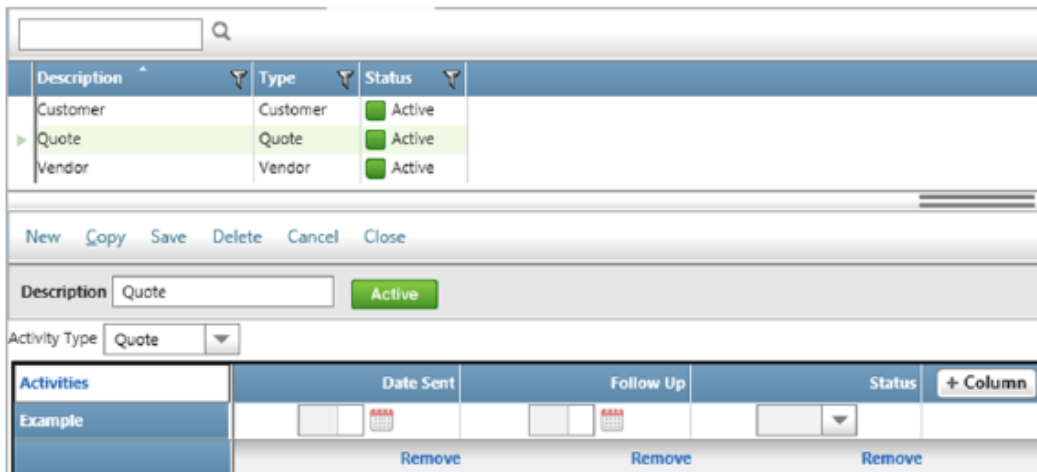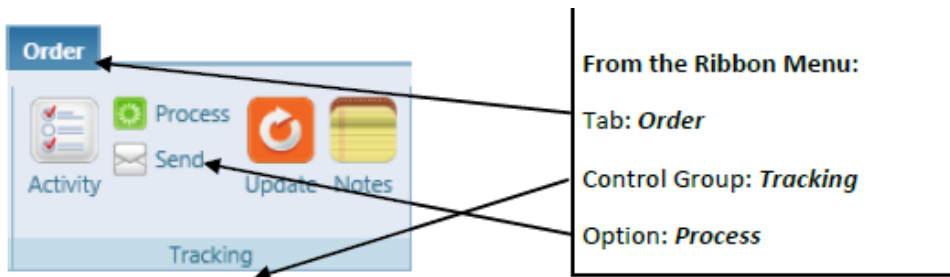
What are the System Preferences for Quote Tracking ?

System Preferences contains a new expander referred to as "Quote Preferences". This is where default processes can be selected that will default into the Quote Tracking View.

The default data range for the Quote Tracking Update list is "This Month". That means only quote product lines with a date that falls into the range of "This Month" are going to show. If you do not enter dates on your quote product lines or if you want to see a range other than this month – create a custom list and save it with the desired date selected.

Note: only the option of "ALL" will show you product lines without a date and "ALL" is only available as a custom list.

The default list does not contain any activities. However, all of the custom activities created are available in the list look and can be added and also edited within the list by clicking inside the cell. These edits will also appear back on the Quote Tracking View.

Quote	Bill To Name	Product Code	Quoted	Product In Hand Date	Customer Code	Follow Up	Date Sent	Status
101	Denver Community Schools	SMAR-14365	1	01/19/2015	DCS			
100	Denver Community Schools	SMAR-14365	1	01/19/2015	DCS			

Quote Tracking Update List:

Quote	Bill To Name	Product Code	Quoted	Product In Hand Date	Customer Code	Follow Up	Date Sent	Status
101	Denver Community Schools	SMAR-14365	1	01/19/2015	DCS	01/20/2015	01/19/2015	Sent
100	Denver Community Schools	SMAR-14365	1	01/19/2015	DCS	01/21/2015	01/20/2015	Waiting on Approval

Quote Tracking View:

⌃ Quote

(Select template and update process) 🔍 ✕

Activities	Date Sent	Follow Up	Status	+ Column
101	1/19/2015	1/20/2015	Sent	
	Remove	Remove	Remove	