

7. Building & sending a quote

The quote is the price for the repair, built on **Quote & Parts**.

Line types

- **+ Part** — type it, or use **catalogue search** to find a real product by name/SKU (pulls price and, with Inventory on, stock on hand).
- **+ Labour** — at the shop's standard rate.
- **+ Tech Labour** — at a specific technician's hourly rate.
- **+ Flat-Rate** — a pre-priced job from your flat-rate list.
- **+ Fee** — diagnostic fee, shop supplies, etc.
- **+ Discount** — goodwill or promotion.

Edit quantity, price, and description inline; totals (subtotal, tax, deposit) update live. Tax is a flat percentage by default, or — if VertexTax is connected — an accurate address-based rate (Section 21). *Rush* and *Emergency* priorities can add a surcharge.

Sending & approval

- 1 **Print / email / send for approval.** The customer reviews online and approves or declines.
- 2 **On approval** the quote **locks** so the price can't drift, and the repair is ready to proceed (a deposit is requested if required).

Modify an approved quote: Modify Quote re-opens it and moves the repair back to *Awaiting Approval*. Higher total → customer must re-approve; same/lower → just send the update.

Multiple quotes

A work order can carry more than one quote (e.g. a diagnosis quote and a repair quote, or good/better/best options). Use **+ New quote** on the Create Quote header to branch; the customer sees the quotes they're meant to.