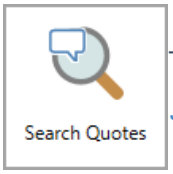
Search Quotes

Last Modified on 13/11/2026 3:42 pm AEST



The instructions in this article relate to ***Search Quotes***. The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

Search Quotes is used to find quote records by status and other quote-related details. It can report on items such as outstanding quotes, *Contractor Industry* where this has been populated from ***Creditor Maintenance***, *Quote Deadline*, and whether a quote has been finalised.

This search assists with reviewing quote activity, analysing quote data, and keeping the Dashboard current for outstanding quotes. Searches can be saved for continuous use, which can then be optionally exported to Excel or produced into a PDF-style document.

Searches

Many search screens use the same layout and tabs, even though each one reports on a different area of data. Once you understand how the search screen works, the same process can be applied across a range of searches.

Search Quotes | Security

To access ***Search Quotes***, the user must have permission set to *Allow* for *Search Quotes* under the *Menus* category in ***Security Setup***.

Search Quotes | What it can report on

Search Quotes reports on quote records using the search values and display columns most relevant to the task being completed. This includes quote status information such as outstanding quotes, quote deadlines within a selected period, whether quotes have been finalised, and *Contractor Industry* where it has been populated from ***Creditor Maintenance***.

This is useful when you need to review quote activity, identify overdue or unresolved quote items, analyse quote data by contractor type, or save a filtered view for ongoing use. The selected columns and sort order can also be tailored to suit the results you need to review.

Search Quotes | Recommended search examples

Find outstanding quotes

This search can be used to find quote records with a status that identifies outstanding quotes.

1. Search for or select ***Search Quotes***.
2. Leave *Current Building* in place, or remove it if you need to search more broadly.
3. Add or select the field that identifies the quote status.
4. Set the required Condition and *Value* to return outstanding quotes.
5. Click *Refresh* to display the matching results.

Track quotes due within the last seven days

This search can assist with tracking quote requests where the *Quote Deadline* falls within the last seven days.

1. Search for or select ***Search Quotes***.
2. Leave *Current Building* in place, or remove it if required.
3. Add the *Quote Deadline* field as a restriction.
4. Set the date restriction to return records within the last seven days.
5. Click *Refresh* to review which quotes have not been received.

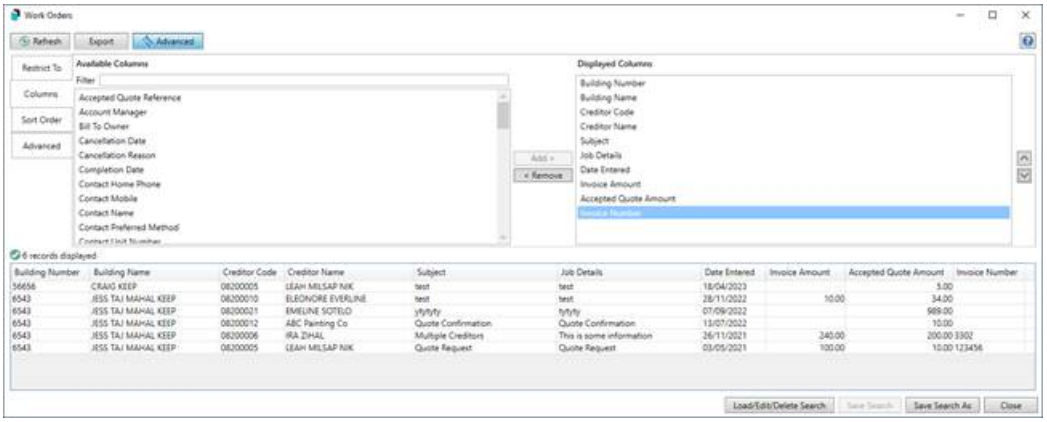
Analyse quotes by contractor industry

This search can be used to analyse quote records by *Contractor Industry* where that information has been populated from ***Creditor Maintenance***.

1. Search for or select ***Search Quotes***.
2. Click + to add a restriction field.
3. Select *Contractor Industry*.
4. Enter or select the required value.
5. Click *Refresh* to display the matching quote records.
6. If required, click *Export* to make the results available in Excel.

Search Quotes | Quote Amount vs Invoice Amount

Use ***Search Work Orders*** to compare quoted amount v invoice amount. Restrict *Status* to *Finalised* so only work orders that have been finalised appear, and restrict Quote amount so work orders without quotes are excluded.



The recording of Quote Requests and issuing of Work Orders can help maintain a clear audit trail of maintenance work orders and enable comparison of quoted amounts v actual invoice amounts. Work Orders should be finalised when invoices are entered via ***Creditor Invoices***.

Quote Requests can be submitted to a number of Creditors and quote details recorded in TaskMax. Once a quote is accepted, TaskMax will record the quoted amount within the Work Order and this amount cannot be edited.

If details of a Work Order, including a quoted amount, vary from the original agreed terms, the Work Order must be cancelled and a new Work Order created. This ensures the audit trail remains.