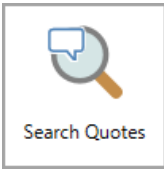


# Search Quotes

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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 screenshot shows the 'Work Orders' application window. It features a top navigation bar with 'Refresh', 'Export', and 'Advanced' buttons. Below this is a 'Restrict To' section with a 'Filter' input field. A 'Columns' list on the left includes fields like 'Accepted Quote Reference', 'Account Manager', 'Bill To Owner', 'Cancellation Date', 'Cancellation Reason', 'Completion Date', 'Contact Home Phone', 'Contact Mobile', 'Contact Name', 'Contact Preferred Method', and 'Contract Job Number'. A 'Displayed Columns' list on the right shows 'Building Number', 'Building Name', 'Creditor Code', 'Creditor Name', 'Subject', 'Job Details', 'Date Entered', 'Invoice Amount', 'Accepted Quote Amount', and 'Invoice Number'. The main area displays a table with 6 records. At the bottom, there are buttons for 'Load/Edit/Delete Search', 'Save Search', 'Save Search As', and 'Close'.

Building Number	Building Name	Creditor Code	Creditor Name	Subject	Job Details	Date Entered	Invoice Amount	Accepted Quote Amount	Invoice Number
5656	CRACK KEEP	0820005	LEAH MELSAP RUK	test	test	18/04/2023		5.00	
6543	JESS TAJ MAHAL KEEP	0820010	ELEONORE EVERLIND	test	test	28/11/2022	10.00	34.00	
6543	JESS TAJ MAHAL KEEP	0820001	EMELINE SOTELD	tytytyty	tytyty	07/09/2022		989.00	
6543	JESS TAJ MAHAL KEEP	0820012	ABC Painting Co	Quote Confirmation	Quote Confirmation	13/07/2022	10.00		
6543	JESS TAJ MAHAL KEEP	0820006	RAA ZHAL	Multiple Creditors	This is some information	26/11/2021	340.00	200.00	3302
6543	JESS TAJ MAHAL KEEP	0820005	LEAH MELSAP RUK	Quote Request	Quote Request	03/05/2021	100.00	10.00	123456

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 Commitments.

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.