

# How to set Quote Status to Lost

Lost status signifies the deal was lost to another option. When a quote is put in lost status, the **Lost Quote screen** will pop up and the user must state why the deal was lost.

1. Open the Quote record, then set the **Status to Lost**. The **Lost Quote screen** will be displayed.
2. Fill out the Lost Quote screen fields.
  - a. Click the **Competitor** combo box button and select from the list to whom the Quote was lost. If the competitor is not in the list, you can manually type in the field the competitor name. This new competitor will be available on the list next time you fill out a Lost Quote. Note that Competitor is a required detailed in saving the record.
  - b. Click the **Reason** combo box button and select from the list the reason for losing the quote. If the reason is not in the list, you can manually type in the field the reason. This new reason will be available on the list next time you fill out a Lost Quote. Note that Reason is a required detailed in saving the record.
  - c. Enter any additional information about the transaction in the **Comment** field.  
Here is a sample Lost Quote.

The screenshot shows a 'Lost Quote' dialog box with the following fields:

- Competitor: XYZ Inc
- Reason: Cheaper Price
- Comment: This is a sample Lost Quote.

- d. Click **OK button**.
3. **Save** the Quote record.

The screenshot shows the 'Quote - ABC Reseller' application window with the following details:

- Type: Standard
- Customer: ABC Reseller
- Date: 6/30/2016
- Due Date: 7/30/2016
- Location: 0001 - Fort Wayne
- Bill To: ABC Reseller
- Ship To: ABC Reseller
- Status: Lost
- Order No: QU-50
- Salesperson: Jared Smith
- Currency: USD
- Comments: sample Standard Quote DUP:1

Item No	Description	UOM	Ordered	Discount	Tax	Price	Total	Tax Group
87G	87 Unleaded Ga...	Gallon	1.00	10.00%	0.23	1.850000	1.66	IN SST
	sample misc item		1.00	0.00%	0.00	10.500000	10.50	
			0.00	0.00%	0.00	0.000000	0.00	

Summary Section:

- Subtotal: 12.16
- Shipping: 0.00
- Tax: 0.23
- Total: 12.39

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**Lost Quote**

OK Cancel

**Details**

Competitor: XYZ Inc

Reason: Cheaper Price

Comment: This is a sample Lost Quote.

Ready

- d. Click **OK** button.
3. **Save** the Quote record.  
Here is a sample lost quote.

**Quote - ABC Reseller**

New Save Search Delete Undo Print Process Duplicate Customer Close

Details Instructions Attachments (0) Audit Log (2) Comments (0)

Type: Standard Bill To: ABC Reseller Ordered By: irelyadmin Order No: QU-22  
 Customer: ABC Reseller Ship To: ABC Reseller PO Number: Salesperson: Jared Smith Status: Lost  
 Date: 04/18/2016 Due: 05/18/2016 Ship Via: UPS BOL No: Split: Currency: USD  
 Location: 0001 - Fort Wayne Terms: 5% 5, Net 30 Template Comments: Sample Quote. DUP: QU-21

Item No	Description	UOM	Ordered	Discount	Tax	Price	Total	Tax Group
87G	87 Unleaded Gasoline	Gallon	1.00	0.00%	0.00	1.850000	1.85	
	sample misc item		1.00	0.00%	0.00	10.500000	10.50	
			0.00	0.00%	0.00	0.000000	0.00	

Bill To: ABC Reseller Somewhere St. Indianapolis, IN, 46204 Item: D2D - #2 Dyed Diesel Quote: Subtotal: 12.35  
 On Hand: 4,995.00 On Order (PO): 5.00 Preliminary Shipping: 0.00  
 Ship To: ABC Reseller Somewhere St. Indianapolis, IN, 46204 Committed: 0.00 Back Order: 0.00 Quote: Tax: 0.00  
 Total: 12.35

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Here is a sample lost quote.

Item No	Description	UOM	Ordered	Discou...	Tax	Price	Total	Tax Gro...	Commen
87G	87 Unleaded Gasoline	Gallon	100.00	0.00%	14.80	1.850000	185.00	IN SST	
	sample misc item		1.00	0.00%	0.00	10.500000	10.50		
			0.00	0.00%	0.00	0.000000	0.00		

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Lost Quote

OK Cancel

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Reason: Cheaper price.

Comment: This is a sample Lost Quote.

Ready

5. Click **OK** button.