

# 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.

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.

Quote - ABC Reseller

New Save Search Delete Undo Print Blend Process Duplicate Recurring Close

DetailsInstructionsAttachments (0)Audit Log (1)Comments (0)Approval (0)

Type:StandardBill To:ABC ResellerPO Number:Order No:QU-50

Customer:ABC ResellerShip To:ABC ResellerBOL No:Split:

Date:6/30/2016Ordered By:irelyadminStatus:LostSalesperson:Jared Smith

Due Date:7/30/2016Ship Via:UPSTemplateCurrency:USD

Location:0001 - Fort WayneTerms:5% 5, Net 30Expiration:Comments:sample Standard Quote DUP:1

InsertOpenRemoveAdd RecipeGet Previous DetailsLayoutFilter Records (F3)

Item No	Description	UOM	Ordered	Discount	Tax	Price	Total	Tax Group
<input type="checkbox"/> 87G	87 Unleaded Ga...	Gallon	1.00	10.00%	0.23	1.850000	1.66	IN SST
<input type="checkbox"/>	sample misc item		1.00	0.00%	0.00	10.500000	10.50	
<input type="checkbox"/>			0.00	0.00%	0.00	0.000000	0.00	

Bill To:ABC Reseller  
Somewhere St.  
Indianapolis, IN, 46204 United States

Ship To:ABC Reseller  
Somewhere St.  
Indianapolis, IN, 46204 United States

Item:  
On Hand:  
Committed:

On Order (PO):  
Back Order:

Quote:  
Preliminary Quote:  
☐ Price Only  
☒ Price and Quantity

☒ Subtotal:12.16  
☐ Shipping:0.00  
Tax:0.23  
Total:12.39

Processed

Page 1 of 1

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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

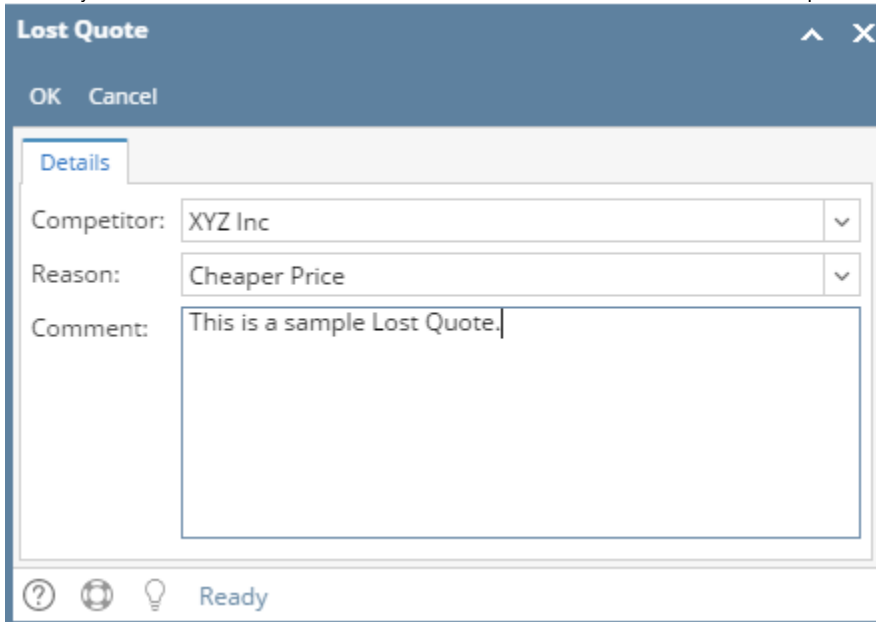
Ship To: ABC Reseller Somewhere St. Indianapolis, IN, 46204 On Hand: 4,995.00 On Order (PO): 5.00 Preliminary Quote: Shipping: 0.00

Committed: 0.00 Back Order: 0.00 Tax: 0.00 Total: 12.35

Processed Page 1 of 1

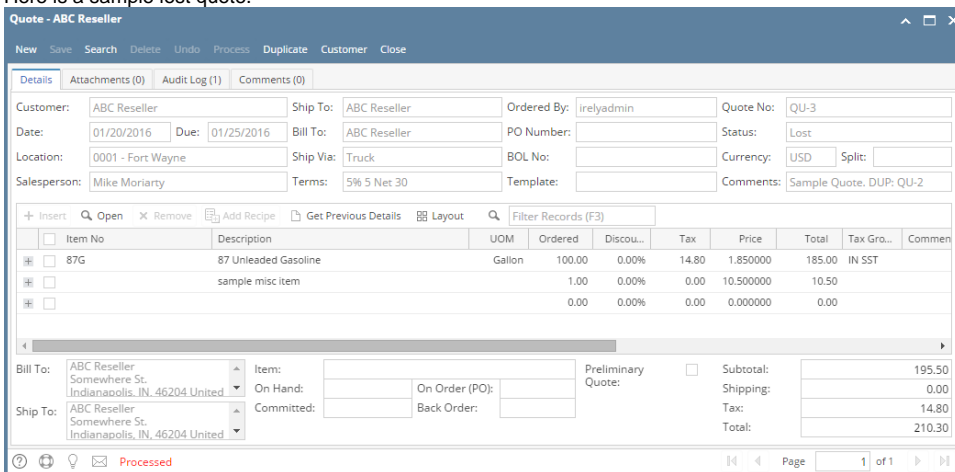
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- c. Enter any additional information about the transaction in the **Comment** field. Here is a sample Lost Quote.



The 'Lost Quote' dialog box has a title bar with a maximize button and a close button. Below the title bar are 'OK' and 'Cancel' buttons. The main area is titled 'Details' and contains three fields: 'Competitor:' with the value 'XYZ Inc', 'Reason:' with the value 'Cheaper Price', and 'Comment:' with the text 'This is a sample Lost Quote.' The bottom of the dialog has a status bar with icons for help, refresh, and a lightbulb, followed by the word 'Ready'.

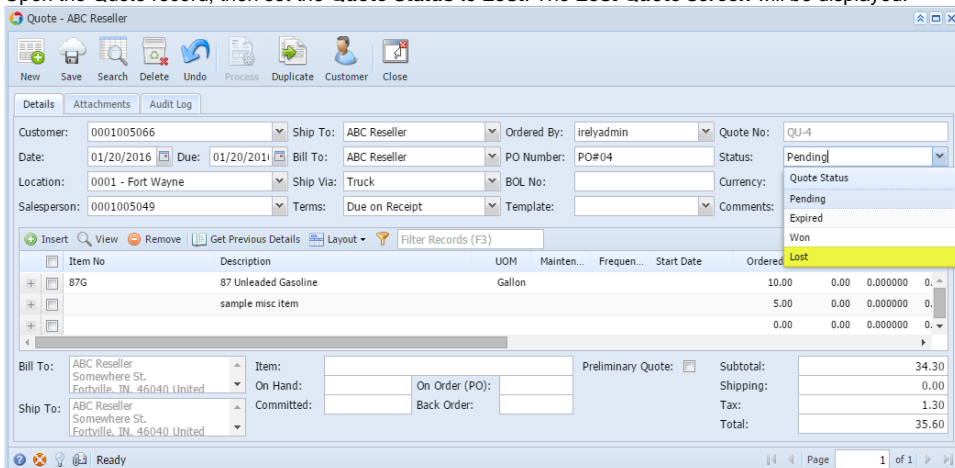
- d. Click **OK** button.  
3. **Save** the Quote record.  
Here is a sample lost quote.



The 'Quote - ABC Reseller' window shows a detailed quote record. The top menu bar includes 'New', 'Save', 'Search', 'Delete', 'Undo', 'Process', 'Duplicate', 'Customer', and 'Close'. Below the menu is a tabbed interface with 'Details', 'Attachments (0)', 'Audit Log (1)', and 'Comments (0)'. The 'Details' tab contains fields for Customer, Date, Location, Salesperson, Ship To, Bill To, Ordered By, Quote No, PO Number, Status, BOL No, Currency, Split, Terms, and Template. Below these fields is a table with columns: Item No, Description, UOM, Ordered, Discou..., Tax, Price, Total, Tax Gro..., and Commen. The table contains three rows of data. At the bottom, there are fields for Bill To, Ship To, Item, On Hand, On Order (PO), Committed, Back Order, Preliminary Quote, Subtotal, Shipping, Tax, and Total. The status bar at the bottom shows 'Processed' and 'Page 1 of 1'.

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 **Quote Status** to **Lost**. The **Lost Quote** screen will be displayed.



The 'Quote - ABC Reseller' window shows a quote record with the status set to 'Lost'. The top menu bar includes 'New', 'Save', 'Search', 'Delete', 'Undo', 'Process', 'Duplicate', 'Customer', and 'Close'. Below the menu is a tabbed interface with 'Details', 'Attachments', and 'Audit Log'. The 'Details' tab contains fields for Customer, Date, Location, Salesperson, Ship To, Bill To, Ordered By, Quote No, PO Number, Status, BOL No, Currency, Split, Terms, and Template. Below these fields is a table with columns: Item No, Description, UOM, Mainten..., Frequen..., Start Date, Ordered, and Lost. The table contains three rows of data. At the bottom, there are fields for Bill To, Ship To, Item, On Hand, On Order (PO), Committed, Back Order, Preliminary Quote, Subtotal, Shipping, Tax, and Total. The status bar at the bottom shows 'Ready' and 'Page 1 of 1'.

2. Fill out the Lost Quote screen fields.

- 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.
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- Enter any additional information about the transaction in the **Comment** field. Here is a sample Lost Quote.

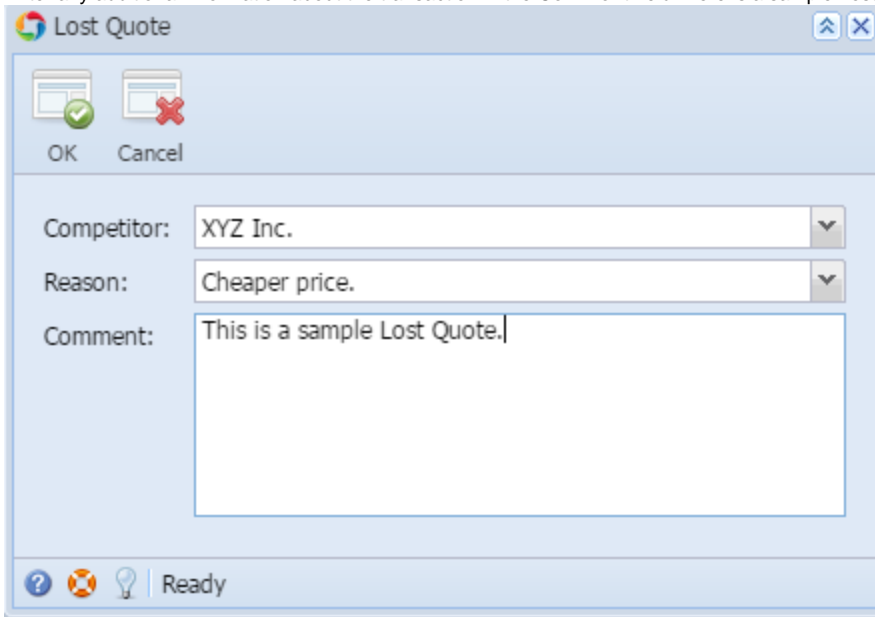
- Click **OK** button.
- Save** the Quote record.  
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Lost Quote

OK Cancel

Competitor: XYZ Inc.

Reason: Cheaper price.

Comment: This is a sample Lost Quote.

Ready

5. Click **OK** button.