Nautaes Captain Guide — Accept a Quotation

Overview

When a supplier sends a quotation for a service request, you can review it and accept it from **Quotations**. Accepting a quotation confirms you approve the scope and pricing, and it unlocks the next step (typically **payment** and then scheduling/starting the job).

Important: Valeria is an AI assistant and can make mistakes. Always verify critical information (scope, quantities/hours, VAT, totals, dates, and safety-related decisions) before accepting.

Step-by-step: Accept a quotation

1. From the left menu, open **Quotations**.
2. Select the quotation you want to review (you'll see the quote reference and status).
3. Review the quotation carefully:
    - **Service** (what the quote is for)
    - **Supplier information** (company details)
    - **Quote items** (e.g., labour hours, unit price, VAT rate)
    - **Notes from supplier** (timing, conditions, validity)
    - **Financial summary** (subtotal, VAT amount, total)
4. Check the **Related to** section to confirm it matches the correct service request.
5. Review any **Attachments** (photos, documents) provided.
6. If a **Captain Signature** is required, click **Add Signature** and sign.
7. Click **Accept** (or the acceptance action shown on the quotation screen).
8. Confirm the status changes to **Accepted**.

After acceptance: what happens next

- You'll see a confirmation that the quotation was accepted.
- The platform will prompt you to **pay the invoice** to start the job (depending on the supplier's payment terms).
- You may also see options to:
    - **Download the quotation**
    - **Request revision** (if something needs changing)
    - **Decline quote** (if you do not agree)

If something looks wrong

Before accepting, use these options:

- **Request revision** if the scope, pricing, VAT, or timing needs adjustment.

- **Decline quote** if you don’t want to proceed.

Quick checklist (Captain)

- Correct service request linked
- Scope is clear and complete
- Labour/parts quantities and hours make sense
- VAT rate and totals are correct
- Any deadlines/validity dates are acceptable
- Signature added (if required)