LEXITAS

Managing Quotes

What is it?

Quotes will arise in the process of record retrieval where Lexitas will request client approval when retrieval costs exceed document cap. Responding to quotes daily will aid in efficient record retrieval.

For any questions or feedback regarding ROS, managing quotes, or the Client Dashboard please contact your account manager.

Quotes are managed within the Client Dashboard. To access and manage quotes-

1. Login to ROS and click on the **Quotes** tab from the client Dashboard.
2. **Sort** by date in the table **or filter** to locate Quote/s
3. Click the **Quote #** on the left side of the table to open the Quote window.
4. Review the quote and **enter a response** to the quote into the **Note** text box. The Note will be sent to the Lexitas Account Manager when you reject or approve the quote.
5. Click the **Download** button to download a pdf of the quote displayed, if needed
6. Click the **Reject** button to reject the quote or **Approve** button to approve the quote for payment.