

# Send for quote for Signature

There are a number of ways to send a quote for a customer to sign. These are:

- Print and send
- Download the PDF and send in an email
- Send for an digital signature

If you want to send for a digital signature & sign-off do the following:

Within the quote (whilst editing) set the status to "Send Quote to Customer to Sign" and click Save

Set to Send Quote to Customer to sign

Quote Stage: **Send Quote to Customer to sign**

Quote Number: 22559

Quote Expires: [Date]

Assigned to: Adam

Approval Status: Approved

VAT Type: VAT

Name of person you are sending the quote to: [Text]

Jobs: Demo quote job

Invoice Status: Not Invoiced

Payment Terms: Nett 15

Approval Issues: [List]

Once Saved you will notice that the status has changed to "Quote Send for Authorisation"

QUOTE-DEMO QUOTE JOB-14042024

Overview | Related Invoice | ACTIONS

Quote Stage: **Quote sent for authorisation**

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**Tip: You can check if the quote has been sent by looking at the section called Customer Sign-Off. You should see a checkbox to confirm if the quote has been sent.**

The screenshot shows a software interface with a sidebar on the left containing various navigation options like 'Create Quote', 'View Quotes', 'Import', etc. The main area displays a 'CUSTOMER SIGN-OFF' section. This section includes fields for 'Date Invoice Accepted', 'Customer Provided Name', 'Customer signature', 'Has Quote email been sent (uncheck to send again)', 'Date Quote Sent to Customer', 'Customer Acceptance Comments', and 'Digital Confirmation URL'. A red arrow points to the 'Has Quote email been sent' checkbox, which is checked. Below this section is a 'CUSTOMER UPLOADED DOCUMENTS' section with fields for 'Document1' and 'Document2'.

The customer can see the quote and click the link to accept

#### Demo Services Quote for your acceptance

The screenshot shows an email interface. At the top, it says 'Demo Services Quote for your acceptance' from 'Demo Services Company <info@demomande.rakata.tech>'. Below this is a warning icon and text: 'If there are problems with how this message is displayed, click here to view it in a web browser. We could not verify the identity of the sender. Click here to learn more.' There is a PDF attachment named 'DEMO Quote (Multi Quote)\_Quote-Demo\_quote\_job-14042024.pdf' with a size of 71 KB. The email body starts with 'Hello' followed by a grey square. The main text says: 'Please find attached, your quotation from Demo Services Limited. Please also find attached accompanying documents for your consideration when placing your order with us. To accept and proceed with this quote, please click the link below to accept the terms and conditions and to e-sign. You will also be asked to provide a purchase order number (if required), or the name of the person responsible for acceptance of this quotation. Please click the link here to accept the quote: [Click Here](#) If you have any questions please do not hesitate to contact us.' A red arrow points to the 'Click Here' link.

From here the customer can accept the quote

Clear

Comments:

Upload 1:

Browse...

No file selected.

Upload 2:

Browse...

No file selected.

Upload 3:

Browse...

No file selected.

Upload 4:

Browse...

No file selected.

This quote is valid for 30 days. Demo Services Company complies fully with the Data Protection Act and GDPR.

By confirming this quote, you agree to Demo Services Company terms and conditions.

CONFIRM QUOTE

Powered by Rakata Technology

**Tip: Once the customer has accepted the quote the Account manager will receive a quote accepted confirmed email to proceed to the next phase.**

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