

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: [Calendar Icon]

Assigned to: Adam

Approval Status: Approved

VAT Type: VAT

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

Jobs: Demo quote job

Invoice Status: Not Invoiced

Payment Terms: Nett 15

Approval Issues: [List of issues]

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

QUOTE-DEMO QUOTE JOB-14042024

Quote Stage: **Quote sent for authorisation**

Quote Number: 22559

Quote Expires: [Calendar Icon]

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Approval Issues: [List of issues]

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 menu items like 'Create Quote', 'View Quotes', 'Import', etc. The main area displays a 'CUSTOMER SIGN-OFF' form. At the top, there are four document slots, each with a red 'X' icon. Below this, the 'CUSTOMER SIGN-OFF' section includes fields for 'Date Invoice Accepted', 'Customer Provided Name', 'Customer signature', and 'Date Quote Sent to Customer'. A red arrow points to a checked checkbox labeled 'Has Quote email been sent (uncheck to send again):'. Below this is a 'Customer Acceptance Comments' field and a 'Digital Confirmation URL' field containing a long URL. At the bottom, there is a 'CUSTOMER UPLOADED DOCUMENTS' section with two document slots.

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

Demo Services Quote for your acceptance

 Demo Services Company <info@demomande.rakata.tech>

Reply Reply All Forward

 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.

 DEMO Quote (Multi Quote)_Quote-Demo_quote_job-14042024.pdf
71 KB

Hello

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.

From here the customer can accept the quote

Clear

Comments:

Upload 1: No file selected.

Upload 2: No file selected.

Upload 3: No file selected.

Upload 4: 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.

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.

Revision #1

Created 14 April 2024 06:08:26 by RakataTech

Updated 15 April 2024 08:32:47 by RakataTech