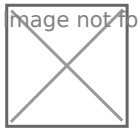
Customer Quote Acceptance

1. The customer will receive and Email and SMS with the quote details to complete



Tip! It is possible to embed the Quote Acceptance link directly within the Email. This is configurable based on your preferences.

2. The customer can open and click the link to accept the quote

3. Clicking the link will open a customised customer acceptance page

Tip! This page is branded with your logo and company colours. The acceptance quote text and confirmation text are configurable by your system administrator.

4. The customer will be requested to complete all the required fields.

5. Click "CONFIRM QUOTE"

Tip! If you accept online payments and this is configured you can set a minimum online payment to accept the quote e.g. 50%. The customer will always have the option to pay the full amount. If you have set configured the option to confirm quote and pay in the showroom the customer will have this option. These options are configurable at the quote sending stage.

Revision #3
Created 29 May 2024 20:46:43 by RakataTech
Updated 29 May 2024 21:14:45 by RakataTech