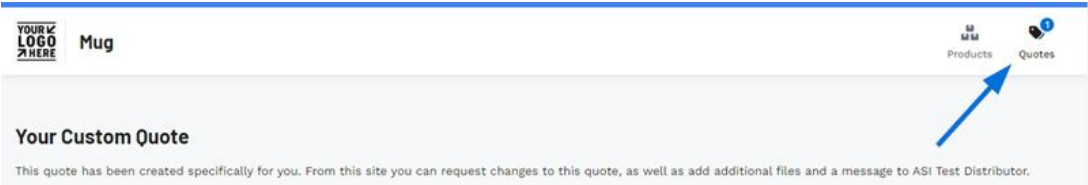


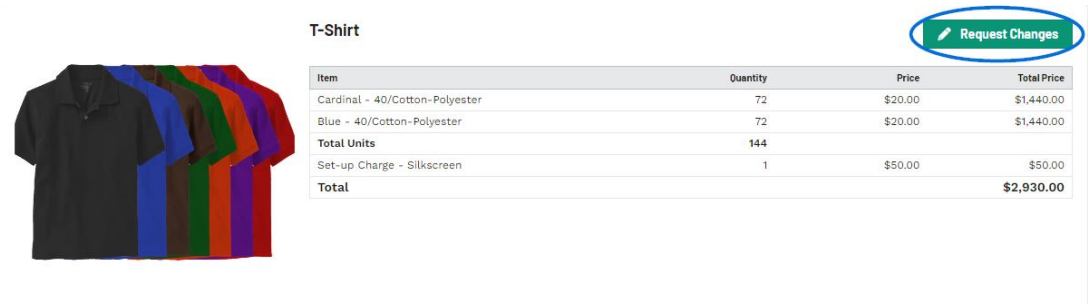
Customer Change Requests on Quotes

Jennifer M - 2023-05-05 - Client Portal

When a customer receives a quote via the Client Portal, they are able to request changes. If the customer wishes to make a change for a product within the quote, they will need to open Quote option in the Client Portal.



From within the Quote, the customer can then click on the Request Changes button within the product listing.



In the Request Changes window, the customer will need to enter their request and their name in the appropriate boxes. Both of these fields are required. When they are finished entering the information, they will click on the Save button.

Request Changes

Please detail the requested changes.



*Example image may not represent the exact configuration selected.

T-Shirt

Item	Quantity	Price	Total Price
Cardinal - 40/Cotton-Polyester	72	\$20.00	\$1,440.00
Blue - 40/Cotton-Polyester	72	\$20.00	\$1,440.00
Total Units	144		

Request Changes *

Need 72 in green as well, please add to order. Thanks!

Name *


Jenn Mannino

× Cancel

Save

Can the customer edit their request after clicking on Save? (click for answer)

Yes, after the customer clicks on the Save button, the Request Changes window will close. The customer's request will be displayed below the product pricing and the button which formerly read "Request Changes" will now display as "Edit Changes".



T-Shirt

Item	Quantity	Price	Total Price
40 - Cardinal/Cotton-Polyester	72	\$20.00	\$1,440.00
40 - Blue/Cotton-Polyester	72	\$20.00	\$1,440.00
Total Units	144		
Set-up Charge - Silkscreen	1	\$50.00	\$50.00
Total			\$2,930.00

Requested Changes:
Need 72 in green as well, please add to order. Thanks!

Edit Changes

Can the customer request changes for multiple products at the same time? (click for answer)

Yes, each product listed in the quote will have its own Request Changes button the customer can use to convey any revisions.

Once the customer has finished entering their requests, they can scroll to the bottom of the Quotes page and click on Send Requested Changes button.

Billing Address

John Doe

4800 E Street Rd
Feasterville-Trevose, PA 19053
United States

Quote Details

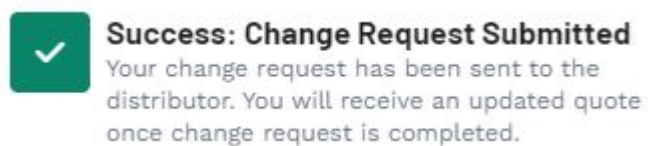
In-Hands Date: May 12, 2023

Prices are subject to change.

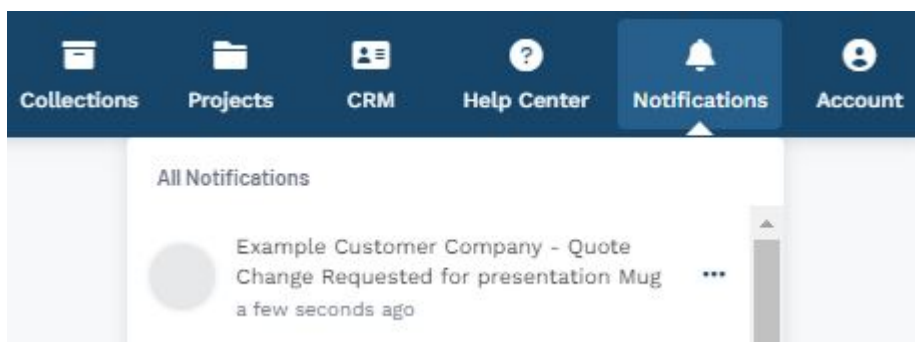
Send Requested Changes

Approve Quote

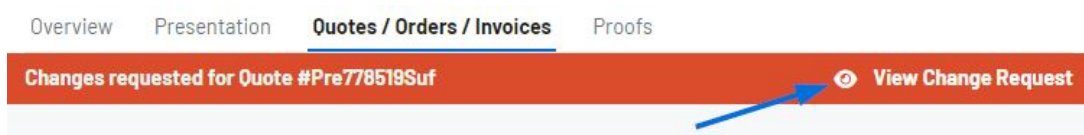
The customer will receive a temporary success message in the lower right corner that their change request has been submitted.



At this point, the distributor will need to open the Project in ESP+ to update the quote. An alert regarding the change request will appear via the notifications bell on the main toolbar.



When the project is opened, an orange bar will be displayed directly below the Quotes/Orders/Invoices tab. On this bar, click on the View Change Request link.




The Customer Change Request page will open with each product for which the customer has submitted a request. Click on the Edit Product link to [update the product information on the quote](#). The change request will be available in the product information during the edit process.

← [Back to Products & Pricing](#)

Customer Change Request

☐ Changes Completed




T-Shirt
Product #: CM1216 | CPN-CPN-552601047

No image available

ASI Tech Training
asi/88465

Changes Requested on 4 May by Jenn Mannino

Need 72 in green as well, please add to order. Thanks!



Once the requested changes have been made, click on Save Changes and then click on the Back to Products and Pricing link. Then, click on the three dot icon and select the [Send Quote to Customer](#) option.

After the quote has been sent, the orange bar will update to gray and indicate that the quote has been resent.

Overview Presentation **Quotes / Orders / Invoices** Proofs

Quote resent on May 4, 2023


How do I mark the changes as complete? (click for answer)

After saving changes and returning to the products and pricing section, the orange bar will still be available until the quote is resent to the customer. Click on the View Change Request link to access the Customer Change Request page. Use the checkbox to mark the product changes as complete and then click on the Back to Products and Pricing link.

← [Back to Products & Pricing](#)

Customer Change Request

☒ **Changes Completed**



T-Shirt
Product #: CM1216 | CPN-CPN-552601047

No image available

ASI Tech Training
asi/88465

How many times can the customer request changes via the Client

Portal? (click for answer)

There is no limit. The customer and distributor can repeat the process of submitting changes, updating the product information, and resending the quote as many times as necessary.
