

ESP+

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Edit Product Information within a Quote

Jennifer M - 2024-09-21 - Quotes & Proofs

After an item has been added to a quote, you will need to configure the product options, quantities, and decoration information before the full product page opens for you to edit all fields. Click on the configure button.

The screenshot shows the 'Quote #1007' interface. On the left is a sidebar with 'Products & Pricing' selected, and other options like 'Decoration', 'Shipping', 'Related Orders', and 'Notes'. The main area displays a product card for '11 oz. Traditional Ceramic Coffee Mugs' (Product #: A7102 | CPN-13939109) from 'BEL Promo' (asi/39552). The card includes a product image, a star rating of 5 stars (130 reviews), and a message: 'There is currently no configuration for this product.' A green 'Configure Product' button is circled in blue at the bottom of the product card.

Note: If the product has been configured previously or submitted from the customer via their portal, click on the three dot icon and select Edit.

The screenshot shows the 'Quote #1006' interface. The sidebar is similar to the previous quote. The main area displays a product card for 'Pen' (CPN-564342476) from 'Advertising Spec Inst. (ASI)' (asi/33020). The card includes an image of four pens, a star rating of 5 stars (1 review), and a three-dot menu icon circled in blue. A blue arrow points from the menu icon to the 'Edit' option in the dropdown menu.

Manage Multiple Products from Different Suppliers

Quotes in ESP+ can contain products from different suppliers within a single quote. After the customer has approved the quote and it is converted into an order, one purchase order for each supplier will be automatically generated.

All products within the quote will be listed in the Products & Pricing section. To reorganize the order of the products on the quote, click on the three dot icon on the product listing and select the appropriate "Move" option.

[See this in action](#)

Once the items are listed in the desired order, use the same three dot icon to edit the product data. Editing product information and pricing must be done on an individual product

basis.

Configure the Product

When configuring a product, if there are multiple product options available, you will need to select the one you would like to order. Then, click on the Next button.

[← Back to Products & Pricing](#)

Choose a Product Option

The Supplier asks that you make these choices before sending your Purchase Order. This information will help ensure your Purchase Order is processed quickly. You can skip and make these choices later.

Shipping Shipping Times

Select Shipping Times ▼

Note: If no product options are available for the product, you will be brought directly into the Quantity section.

In the Quantity section, use the available pricing grid to enter the amount for the variants (colors, sizes, shapes, materials, etc) you would like to order.

[← Back to Product Options](#)

Quantity

Enter your quantities below. Once your order is created, you can edit the colors, add additional instructions and make other updates.

	4 GB	128 MB	256 MB	512 MB	1GB	2 GB	8 GB
White	\$9.733 <input type="text" value="20"/>	QUR <input type="text" value="20"/>	\$7.867 <input type="text" value="20"/>	\$8.40 <input type="text" value="20"/>	\$9.20 <input type="text" value="20"/>	\$9.467 <input type="text" value="Quantity"/>	\$10.133 <input type="text" value="Quantity"/>
Black	\$9.733 <input type="text" value="Quantity"/>	QUR <input type="text" value="Quantity"/>	\$7.867 <input type="text" value="Quantity"/>	\$8.40 <input type="text" value="Quantity"/>	\$9.20 <input type="text" value="Quantity"/>	\$9.467 <input type="text" value="Quantity"/>	\$10.133 <input type="text" value="Quantity"/>

The Product Summary section on the right will update with each quantity you have entered. When you are ready, click on the Next button.

[Next →](#)

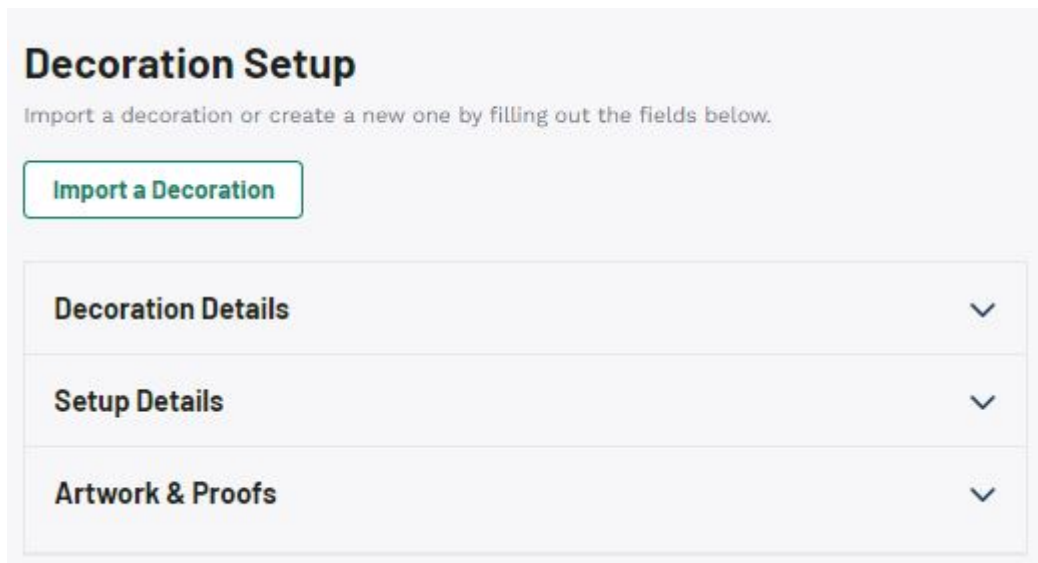
Product Summary

Total Quantity	100
Margin	\$281.60 (40.00%)
Total Product Cost	\$422.40
Total Product Price	\$704.00

What is the difference between Total Product Cost and Total Product Price? (click for answer)

The **Total Product Cost** is the base amount that you will need to pay to the supplier for the number of products you have entered. The **Total Product Price** is the suggested base amount (provided by the supplier) that your customer will need to pay you. The difference between these two numbers is the **Margin**, which is the amount you stand to earn on this transaction.

In the Decoration Setup section, you will be able to import, add, or modify the decoration information.



Decoration Setup

Import a decoration or create a new one by filling out the fields below.

[Import a Decoration](#)

- Decoration Details
- Setup Details
- Artwork & Proofs

If you have worked with this customer before and have a saved decoration template, you can click on the Import a Decoration button to apply previously configured imprint options.

If the supplier provides imprinting for this product, information will be automatically filled in for the Decoration Details, Setup Details, and Artwork & Proofs sections. This information can be modified. Additionally, if the supplier does not provide and you do not have a saved decoration template for the customer, the decoration setup fields will be blank and you can enter any information regarding the imprint you need.

Note: The Decorator company must be saved in the CRM to be available as an option in the Decorator field.

Decoration Details

The Decoration Details section is where you can edit or enter information regarding general imprinting such as the Decorator, notes, imprint method and location.

Decoration Details ^

Decorator *

Decoration Name

Save decoration to this customer's CRM record

Decorator Notes Visible

Help decorators understand how they will need to setup their space for this decoration.

Imprint Method

Imprint Location

Setup Details

The Setup Details enable you to enter specific information about the imprinting, such as the imprint color, size, and applicable product variants. This section is also where you can enter instructions for the decorator.

Setup Details ^

Imprint Color

Imprint Size

Apply Decoration Detail to All Product Variants?

Yes, Apply to All Product Variants.

No, Select Product Variants to Apply to.

Instructions Visible

Enter Decoration Instructions


[Add Another Setup Detail](#)

Artwork & Proofs

In Artwork & Proofs section, you can upload any applicable artwork files for this product. Artwork can be uploaded from your computer, imported from the customer's CRM record, and/or imported from a previous order. This section also enables you to select a proof type and indicate if client approval is required.

Artwork & Proofs

Upload Artwork ⓘ



Choose Image to Upload

 or drag and drop here.

Select from CRM

Select Artwork ▼

Select from Order

Select Artwork ▼

Proof

Select a Proof Type ▼

Require Client Approval

Proof will be sent to the owner's email address.

When you are finished, click on the Save Decoration button. Then, click on the Save to Order button.

← Back to Quantities
Save to Order

Decoration Setup

Import a decoration or create a new one by filling out the fields below.

Import a Decoration

Decoration Details ▼


Setup Details ▼

Artwork & Proofs ▼

Cancel
Save Decoration

Product Summary

Total Quantity	1000
Margin	\$500.00
Total Product Cost	\$1000.00
Total Product Price	\$1500.00



Pen #2
CPN-564342476

Advertising Spec Inst. (ASI)
asi/33020

Total product price is for merchandise only. This

Modify All Product Information

Product Details

The Product Details section contains:

- **Product Image**

To add a custom image by uploading it from your computer, click on the Upload button at the bottom of the Product Image section.

- **Product Name (required)**

The product name provided by the supplier will be automatically filled in. You can use this field to update this information.

- **Product Number**

The product number provided by the supplier will be automatically filled in. You can use this field to update this information.

- **Product Category**

The product category cannot be altered.

- **Customer Product Number**

The Customer Product Number is a distinct call number for an item which is unique to your company that are different from the supplier's product number. A benefit to using customer product numbers is that they can only be utilized by your company. For example, if a customer tries to trace this product number via the internet or a competitor, it will not yield the correct product - even if said competitor is also using ESP. You can use this field to update this information.

- **Product Supplier**

The product supplier cannot be altered but it will not appear on the customer facing quote.

- **Product Description**

The product description provided by the supplier will be automatically filled in. You can use this field to update this information.

Product Variants

Product variants consists of the requested descriptive information about the product. Essentially, how many of each color, size, material, shape, etc. If the customer completed a quote request, the quantities and product variants may be automatically filled in but if pricing is not displayed, you can enter it in the available boxes.

Where do I get the pricing info? (click for answer)

If the pricing information does not display with the line item in a customer requested quote, you can use the Add Another Line Item to pull each product variant configuration (with pricing and SKU number) into the quote.

To do this, click on the Add Another Line Item link. If there are multiple applicable price grids for the line item, you will need to select a price configuration. Once you have set the configuration, use the dropdown to select the product variant you would like to include. Then, update the quantity to reflect the amount requested by the customer and delete the existing line item for that product variant.

[See this in action!](#)

How do I update what the customer sees for each product variant? (click for answer)

Use the arrow to expand the product variant section. The customer facing description will display for that line item within the quote. Additionally, you can use the checkboxes to hide product variant info or the trash can to remove the variant from the quote.

[See this in action!](#)

Options & Charges

The Options & Charges section includes any charges beyond the base pricing which are active on the quote, invoice, or order. The Vendor Charges section will contain any potential charges provided by the supplier so you do not need to refer to the product detail page or re-key any information; but these charges are not included in the order until you manually add them.

For example, the vendor may include a charge for a gift box. If your customer requested the product have a gift box, then this charge would apply, so you can click on the "+Add Charge" link to include on the order. If not, you do not need to take any action. The charge will remain in the Vendor Charges section and not be included on the order.

Options & Charges								
Charge Type	Description	Visible	Run	Quantity	Net Cost	Margin (%)	Price	Tax
+ Add a Charge + Add a Run Charge								
Vendor Charges								
Vendor Charges				Quantity	Net Cost	Margin(%)	Price	
Packaging Charge - Individually Gift Boxed - Individually Gift Boxed				1	\$2.0000	20.00%	\$2.5000	
+ Add Charge								
Re-order Charge - Gift Boxes - Gift Boxes				1	\$20.0000	20.00%	\$25.0000	
+ Add Charge								
+ Add a Custom Charge								

Once a charge has been moved into the Options & Charges section, you will be able to edit the information.

Decoration Details

The Decoration Details section enables you to configure the applied decoration by choosing a decorator and selecting variants.

If the customer entered details about the decoration during the quote configuration process, it will be shown at the top of this section. If the supplier provides imprinting, they will be shown as the decorator.

Decoration Types (click for answer)

- **Applique**

An embroidered motif or cut, which can be used as a separate embroidered figure. Also, fabric, which may or may not be previously embroidered, sewn to another piece of fabric or to a garment.

- **Blank**

Alternate terms: *Unimprinted, None*

The option to order the item without any imprinting or decoration.

- **Chenille**

Alternate terms: *Loop Piling*

A form of embroidery, widely used in the college apparel markets, in which a large loop stitch is left on the top of the fabric. This embroidery utilizes the chain stitch described above. Uses heavy yarns of wool, cotton, or acrylic.

- **Debossed**
Depression of an image into a material such as paper, leather or suede, so the image sits below the product surface.
- **Die Cast**
Process where molten metal is injected into the cavity of a carved die.
- **Die Stamp**
Steel plate engraved with the desired image, generally used to apply a gold or silver imprint.
- **Direct to Garment Printing**
Direct to Garment Printing or DTG, utilizes specialized ink and printers to apply ink directly onto the garment itself.
- **Emblems/Patches**
Emblems and patches are representations distinctive badge which can made from a wide variety of materials and are symbolic objects.
- **Embossed**
Raising of an image on a product, accomplished by pressing the material between concave and convex dies.
- **Embroidery**
Alternate terms: *Embroidered*
Design stitched onto fabric through the use of highspeed, computer-controlled sewing machines. Embroidery is also the art of creating and producing ornamental needlework consisting of designs worked on fabric with high luster threads either by hand or machine.
- **Embroidery Digitizing Services**
The process of converting artwork into a digital file that can be read by an embroidery machine.
- **Engraved**
Cutting an image into metal, wood or glass by one of three methods; computerized engraving, hand tracing or hand engraving.
- **Etched**
Imprinting method in which the product to be imaged is coated with a protective coating that resists acid. The image is then exposed, leaving bare metal and protected metal. The acid attacks only the exposed metal, leaving the image etched onto the surface.
- **Foil Stamp**
Alternate terms: *Foil Stamped, Foil Stamping, Hot Stamp, Hot Stamped, Hot Stamping*
Process in which a metal plate or die is heated and then pressed against foil into a surface, causing the pigments of the foil to transfer to the surface.
- **Full Color Process**
Alternate terms: *Four Color Process*

A Full Color Process is a printing process that creates color productions by overprinting screens. This is sometimes referred to as a "Four Color Process" because decorators will individually print reds, yellows, blues and blacks of variable specified intensities to create a wide spectrum of colors.

- **Heat Transfer**

Heat Transfer can involve two options:

1. *Direct-transfer process*

Imprinting method in which an image is screened onto a transfer substrate, which is then laid directly on the material to be imprinted. The image is transferred from the substrate to the material through heat and pressure.

2. *Sublimation*

Process in which a design is transferred to a synthetic fabric by heat and pressure. The heat causes the inks to turn into a gas so that they penetrate the fabric and combine with it to form a permanent imprint.

- **Hot Stamped/Hot Stamping**

Dry imprinting process in which a design or type is set on a relief die that is subsequently impressed by heat and pressure onto the printing surface.

- **Laser Etching**

Alternate terms: *Laser Engraving*

Imprinting method by which art or lettering is cut into a material by a laser beam that vaporizes the portion exposed through openings in a template.

- **Lithography**

Printing process where an image is created as a positive (meaning portion to be imprinted will be raised to create image) on a plate. The plate is then covered in ink and applied to the item.

- **Monogramming**

Design composed of one or more letters, usually the initials in a name. Generally used in conjunction with embroidery.

- **Offset Printing**

Printing process in which a positive image is transferred to a rubber blanket in reverse, which in turn applies it to the surface to be printed, right reading.

- **Pad Print**

Alternate terms: *Pad Printing, Tampography, Tampo Printing*

Method of imprinting in which a recessed surface is covered with ink. When the plate is wiped clean, ink remains in the recessed area. A silicone pad then presses against the plate, pulls the ink out of the recesses and is pressed directly against the product.

- **Personalization Offered**

The option to imprint the recipient's name on a particular product.

- **Rhinestones/Crystals**

The process of creating a design using rhinestones or crystals. This can be done

using templated sheets and heat transferred or in conjunction with embroidery.

- **Screen Print**

Alternate terms: *Screen printing, Silk Screen, Silkscreen, Silkscreening*

Imprinting method in which the image is transferred to the printed surface by ink squeegeed through a stenciled screen stretched over a frame. Screens are treated with a light-sensitive emulsion, then film positives are put in contact with the screens and exposed to light. The light hardens the emulsion not covered by the film, leaving a soft area on the screen for the squeegee to force ink through.

- **Silkscreen**

Please refer to Screen Print

- **Sold Unimprinted/Sold as Blank**

The supplier for the item will sell it without any imprinting or blank. If the supplier will only sell as blank and imprinting is needed, distributors can employ the services of a decorator company.

- **Sublimation Printing**

Alternate terms: *Plastocal Transfer*

Dye transfer process where the image consists of a colored dye permanently embedded into the material surface of pores. Used to imprint messages, graphics and photographs on a variety of items, primarily mousepads, mugs, T-shirts, caps and trophy medals.

Related Content

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- [Start a Quote](#)
- [Options & Charges vs Vendor Charges](#)
- [Add Charges to Quote and/or Order](#)
- [Enable and Configure a Split Shipment](#)
- [Select Product Variants for Decoration](#)