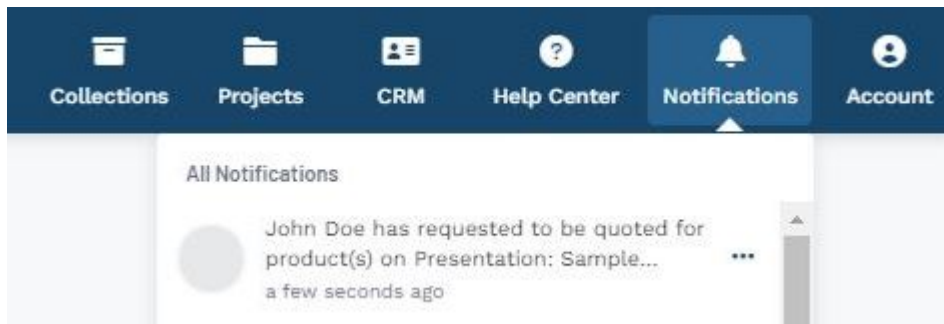


Process a Customer Requested Quote

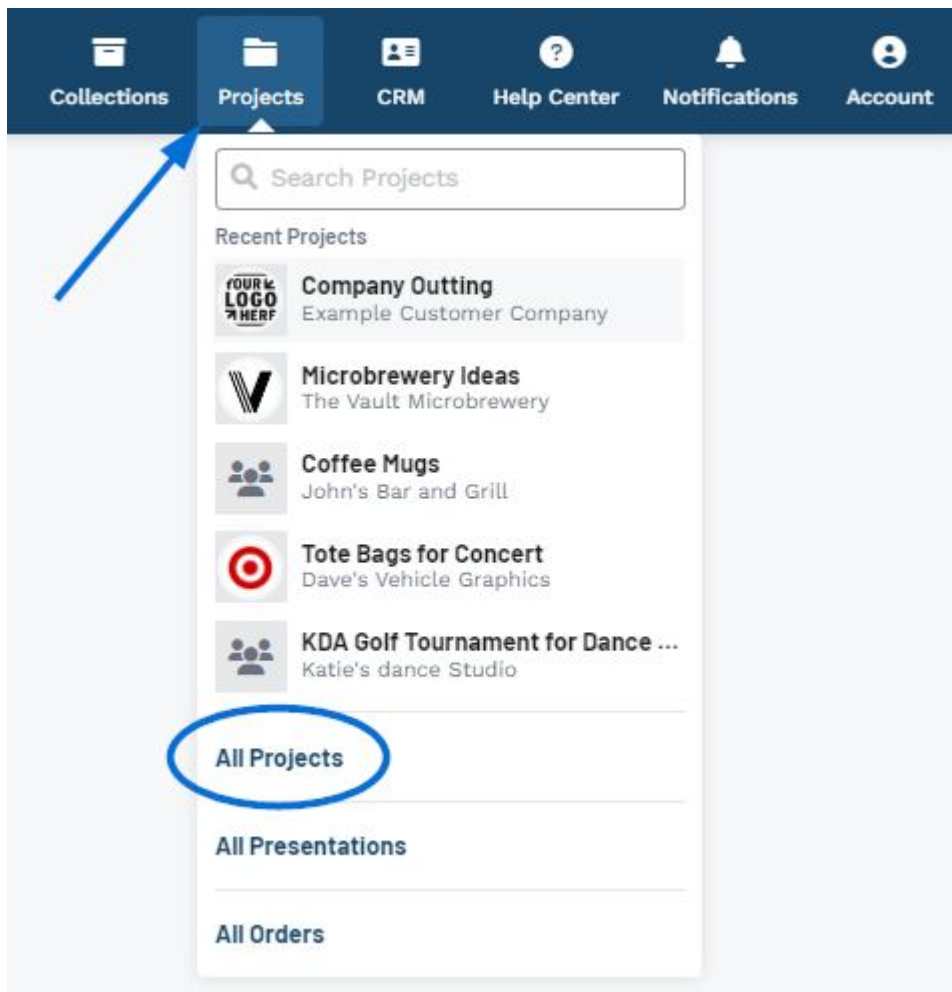
Jennifer M - 2023-02-15 - Quotes & Proofs

After a customer requests products via their portal, you will be notified via the bell icon on the main toolbar. Click on the notification to be brought directly in the Quotes/Orders/Invoices section of the Product.



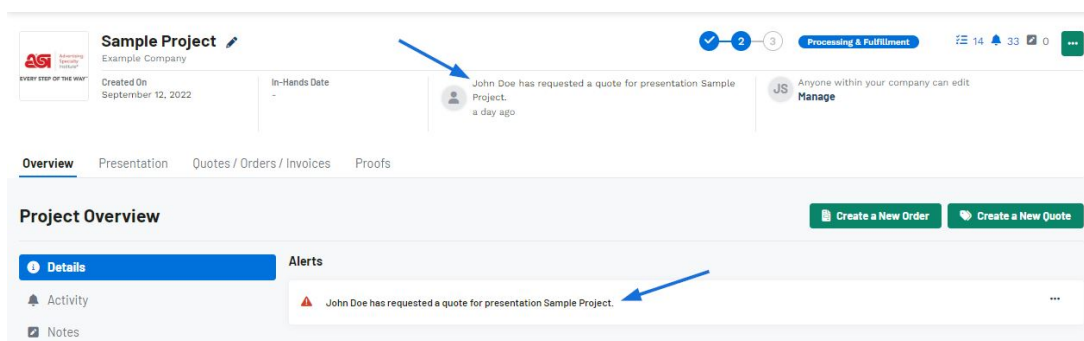
I don't have a notification

If notifications for newly created quotes are disabled in Account - Settings area, you can access the requested quote by going to the Projects dropdown and selecting the project. If the project you need does not appear in the listed options, click on All Projects.



In the Projects area, locate the project and click on name to open it.

On the Project Overview tab, the new quote alert will be displayed in the main section as well in the Alerts area. The requested quote from the customer will appear in the Quotes/Orders/Invoices tab of the main Project.



In the Quotes/Orders/Invoices section, the quote will be displayed in the dropdown.

Quote #2019601194k 

Quote Status and Summary

Directly below the dropdown is the Quote status and summary. The status for newly created quotes will default to "Open" but you can use the Update Status link to change it. Open and Closed are standard available statuses, but administrators can use the Account - Settings area to create custom ones.

The Quote Summary section contains an overview of the pricing information for various aspects of the quote. For customer submitted quotes, all pricing fields will initially be shown as zero.

Quote status	
Open	Update Status
Quote Summary	
Vendor Cost	Customer Price
\$0.00	\$0.00
Shipping Cost	Shipping Price
\$0.00	\$0.00
Margin	Discount
\$0.00	\$0.00
	Sales Tax
	\$0.00
	↻ Use Current Rates
	Total
	\$0.00

Products & Pricing

Customer and Quote Information

The Customer Information section will contain the primary point of contact provided by the customer. If the customer also provided Shipping and Billing Contact information, it will be displayed in this area as well. If you need to make any changes to this information, click on the pencil icon.

Customer Information

John Doe

555-555-5555

john@examplecompany.com

Shipping Contact

John Doe

Example Company

4800 E Street Rd

Feasterville-Treose, PA 19053

United States

Billing Contact

John Doe

Example Company

4800 E Street Rd

Feasterville-Treose, PA 19053

United States

To the right of the Customer Information is the Quote Information which the main, general information section for this quote. To make any changes to the fields in this section, use the pencil icon.

Quote Information

New

Quote Created

December 21, 2022

Quote Expires

January 3, 2023

Quote Contact

Jennifer Shinberg

Sales Person

Jenn Shinberg

PO Reference

-

Payment Method

-

Discount %

-

Credit Terms

-

In-Hands Date

January 18, 2023

Ship Date

January 12, 2023

✓ Firm

✓ Blind ship

Shipping Method

-

Shipping Account

-

Artwork & Files

Any information uploaded by the customer during the quote configuration will be displayed in this section. There are three icons:

- **Garbage Can:** Delete the artwork or file from the quote
- **Download:** Save a copy to your computer
- **Preview:** Opens a large preview

Artwork & Files




Your Logo Here.png


Size: 6KB

Edit Product Information


All products within the requested quote will be listed. Use the meatball icon to select Edit to update the information before sending the quote to the customer or converting it to an order.






Popular Aluminium Portable Power Banks 2600mAh
Product #: PBK12507 | CPN-551679066



ImprintID
asi/73651



Variant information submitted by
Be sure to check Customer selections for correct


 Edit
 Copy
 Delete

Item	Quantity	Net Cost	Margin	Price	Total Cost	Total Price	Tax
3 3/4 " x 7/8 " x 7/8 " - Silver - Aluminum	100	\$0.0000	0.00%	\$0.0000	\$0.0000	\$0.0000	<input checked="" type="checkbox"/>
3 3/4 " x 7/8 " x 7/8 " - Maroon - Aluminum	100	\$0.0000	0.00%	\$0.0000	\$0.0000	\$0.0000	<input checked="" type="checkbox"/>
3 3/4 " x 7/8 " x 7/8 " - Black - Aluminum	100	\$0.0000	0.00%	\$0.0000	\$0.0000	\$0.0000	<input checked="" type="checkbox"/>
Total Units	300						
Total (USD)					\$0.00	\$0.00	6.00%


Decoration

When editing the decoration information for **all products** within the quote, use the meatball icon and select Edit.



Silkscreen




Imprint Location	Imprint Method	Imprint color	Imprint Size
-	Silkscreen	-	-



ImprintID
asi/73651

 Edit
 Remove

Artwork & Files



Your Logo Here.png
Size: 6KB

Proof Required

Blank

Instructions

-

[+ Show More Details](#)

The first section available for updating the decoration information encompasses the the imprint location, imprint method, imprint color and imprint size. This information will update the imprinting details for every item within the quote.

- **Imprint Location:** Where on the item the imprint will be located. For example, "Left Chest" on a shirt would be an imprint location.
- **Imprint Method:** The process by which the artwork is applied to the item. Examples of imprint methods are screenprint, embroidery, hot stamp, laser engrave, etc.
- **Imprint Color:** The color(s) included within the imprint. This can be a single or multiple colors.
- **Imprint Size:** How big the artwork will be imprinted.

Center - Silkscreen - White



Imprint Location <input type="text" value="Center"/>	Imprint Method <input type="text" value="Silkscreen"/>
Imprint Color <input type="text" value="White"/>	Imprint Size <input 1"="" type="text" value="1" x=""/>

Below these fields is the Artwork & Files section. Within this section, any files provided by the customer will be displayed. If you have additional artwork and/or files saved to the customer record, you can use the Select from CRM dropdown. You can also use the Select from Order dropdown to include any artwork or files that have been added to this order. You can use the Choose Image to Upload button in the Upload Artwork section to browse your computer for additional files.

All artwork and files uploaded to the quote either by the customer when they submitted the quote request or uploaded by you while processing the quote will be displayed in the Attached Artwork section.

Artwork & Files

Select from CRM <small>Select artwork and files saved to the CRM for this customer</small> <input type="text" value="Select Artwork"/>	Select from Order <small>Select artwork & files saved to this Order.</small> <input type="text" value="Select Artwork"/>
---	---

Upload Artwork <small>Upload up to 10 files per order.</small> <div style="border: 1px dashed gray; padding: 10px; text-align: center;">  Choose Image to Upload <small>or drag and drop here.</small> </div> <small>File size must be less than 10MB. Allowed file types are .ai, .csv, .doc, .docx, .dst, .eps, .jpeg, .jpg, .png, .pdf, .svg, .tif, .tiff, .xls, .xlsx</small>	Attached Artwork <div style="border: 1px solid gray; padding: 5px; text-align: center;">  <small>Your Logo Here.png Size: 6KB</small> </div>
---	---

Use the Instructions field to communicate any specific messages regarding decoration to the supplier or decorator. Checking the Visible box will also display the instructions on customer facing documents, such as quotes and invoices. If the customer requested a Proof, use the dropdown to select the type and use the checkbox if client approval is needed.

Instructions

Enter Decoration Instructions

☐ Visible

Proof Type

Select proof

☐ Require client approval
Proof will be sent to the order owner's email address

To save the decoration configurations for this customer, in the Save Decoration Name box, name the decoration and then click on the Save Decoration button.

Save Decoration

Name this Decoration to save it to the CRM record for this Customer.

Decoration Name

Company Logo

Save Decoration

Shipping

This section will contain the shipping path for **all products** within the quote. By default, the shipping route will originate from the supplier for each item. If the quote contains multiple products from a single supplier, they will be in the same shipping route.

The three dot icon at the top of the shipping route enables you to edit the main shipping path fields, such as the in-hands and ship dates as well as the Ship To address, shipping method and shipping account.

Shipping Route

Ship From *

imprintID

☒ Blind Ship

In-Hands Date

1/18/2023

☐ Flexible
☒ Firm

Ship Date

1/12/2023

Ship To *

Customer

John Doe

4800 E Street Rd

Feasterville-Trevoze, PA 19053

United States

Shipping Method

Select a Shipping Method


Shipping Account

Enter an Account Number

☐ Visible

Products in this Shipment

All variants of a product will be added by default. To change this you will need to update shipping within each product.



Popular Aluminium Portable Power Banks 2600mAh

Product #: FBK12507 | CPN-551679066

Product Variants Applied (3)

The pencil icon on the product listing in this section will enable you to edit the shipping route for the individual product.

Related Orders

This section will contain any additional order documentation related to this quote, such as an order and/or invoice.

Related Content

- [Edit Product Information within a Quote](#)
- [Send the Quote to the Customer](#)