# ESP+

Sample Requests

Jennifer M - 2024-01-08 - Orders

A sample request is a sales document sent from the distributor to the supplier asking for a small quantity of a product prior to placing an order. The sample request is sent to the supplier, so it will contain net cost information and vendor details and should only be shared internally.

To create a sample request, click on Projects from the main toolbar and locate the project.

From the Projects Overview tab, click on the "Create a Sample Request" button.
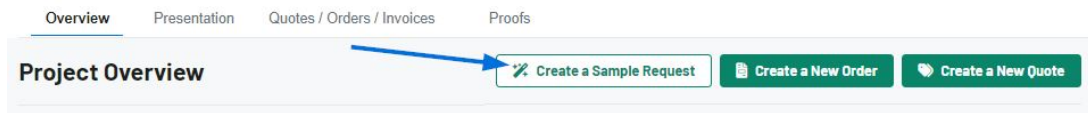
When the Sample Request Information window opens, the sample request date is a required field but will be automatically filled in with the current date. There are two other required fields: sales person and order contact.

Create a New Sample Request for Project

This Sample Request will be added to the project and can be added to or updated when viewing the project overview's quotes and orders tab.

Sample Request Information

Sample Request Date *

📅 01/08/2024

Sales Person *

🔍 Jenn Mannino   ✕

Order Contact *

🔍 Jenn Mannino   ✕

PO Reference

Add a PO Reference

In-Hands Date

📅 01/30/2024

Ship Date

📅 01/23/2024

☐ Flexible   ☑ Firm

☐ Blind Ship

Shipping Method

Select a Shipping Method ▾

Shipping Account

Add a Shipping Account #

Payment Method

Select a Payment Method ▾

Credit Terms

Select Credit Terms ▾

🖊 **Create Sample Request**

After completing the required fields, enter as much additional information as possible in the remaining boxes. Once you have finished entering information, click on the "Create Sample Request" button.

The sample request will be listed as an order document in the Quotes/Order/Invoices tab of the project.

YOUR LOGO HERE

Example Presentation 🖊
Example Customer Company

Created On
January 8, 2024

In-Hands Date
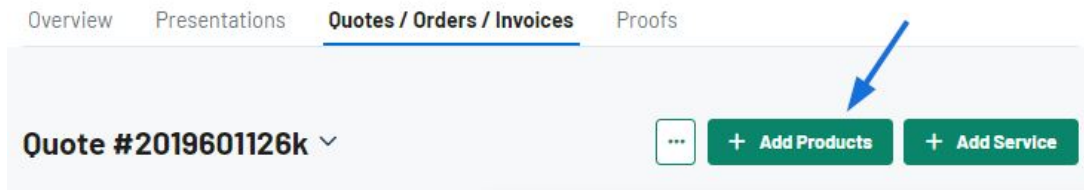-

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

Sample Request #Pre1001118Suf ⌄

You can now add the product(s) to the sample request using the "+Add Products" button.

The Add Products & Import Services window will open and there are five options for adding products:

Add Product(s) using Quick Add

The Quick Add option enables you to select from any item in ESP by entering search terms in the "What are you looking for?" box. Type keywords, product numbers, or customer product numbers in the box.

Use the checkbox to select the product(s) you would like to include in the sample request.

When you are finished, click on the "+Add Products & Configure" button.

See the Quick Add section in action!

Add Product(s) from a Collection

The Collection option enables you to select any item that has been saved in a Collection. Use the "Select a Collection" dropdown to view the five most recent collections. You can also use the Search Collections box to type a collection name. Click on the collection listing to display items within.

Use the checkbox to select the product(s) you would like to include in the sample request.

When you are finished, click on the "+Add Products & Configure" button.

See the Collection section in action!

Add Product(s) from a Presentation

The Presentation option enables you to select any item that has been included in a presentation. Use the "Select a Presentation" dropdown to type a presentation name. Click on the presentation listing to display items within.

Use the checkbox to select the product(s) you would like to include in the sample request.

When you are finished, click on the "+Add Products & Configure" button.

See the Presentation section in action!

Add Product(s) from an Order

The Order option enables you to select any item that has been included in a order. Use the "Select an Order" dropdown to view recent orders or use the Search Orders box to type an

order number, company name, or project name. Click on the order listing to display items within.

Use the checkbox to select the product(s) you would like to include in the sample request.

When you are finished, click on the "+Add Products & Configure" button.

[See the Order section in action!](#)

Add Product(s) using a Custom Product

The Custom Product section enables you to create a quote with a custom item. While the Product Name and Supplier are required, it is recommended that you include as much information as possible. Once you have finished entering information, click on the "Add Custom Product" button. The product will be moved into the Selected Products & Services section.

Use the checkbox to select the product(s) you would like to include in the sample request.

When you are finished, click on the "+Add Products & Configure" button.

[See the Custom Product section in action!](#)