ESP+

Start a Quote

Jennifer M - 2023-07-10 - Quotes & Proofs

To begin a quote, do a search for the product(s) and add the item(s) to a presentation.

How do I add product(s) to a presentation?

There are numerous ways to add product(s) to a presentation. Please review the Start a Presentation/Project article.

Why do I need to create a presentation to do a quote?

Quotes are created from within a project and when you create a presentation (or an order), you are simultaneously creating a project. By creating a presentation first, you can create a quote directly from the presentation by marking the items and then later, convert the quote into an order.

Why should I add products to presentation instead of an order?

While creating an order will also create a project where you can create a quote; as the project is created, a presentation is automatically generated. From within that project, you can create a quote which can be converted to an order. If you begin by creating an order to complete a quote and then convert the quote to an order, two orders will exist within the same project.

In the Create a New Presentation or Select an Existing One window, click on Create a New Presentation option.

Next, in the Select an Existing Customer or Create a New One window, click on the tile for an existing customer or select the Create a New Customer button.

If you choose an existing customer, you will need to enter the Presentation Name and then choose the closest option in the Event Type dropdown. Next, fill in as much as information as possible in the remaining fields: event date, attendees, in-hands date, and budget. It is important to keep in mind that all information entered on this screen can be updated at a later date.

When you are finished, click on the Create Presentation button.

There will be success message in the bottom right corner with a link to Configure Products. Clicking on this link will open the project in the Presentation tab.

Note: If the success message closes before you can click, go to the main toolbar, click on Projects and the newly created project will be the first option in the dropdown.

All items within a presentation will be displayed in the Edit Products area of the Presentation tab. To add products directly from a presentation to a quote or order, use the checkbox on the item listing to select the product(s).

A toolbar will display at the bottom. Use the available buttons to begin a quote or order with the select item(s).

The Create a New Quote for Project window will open. While the Quote Date, Sales Person, and Order Contact are required, it is recommended that you provide as much information as possible in this window.

When you're finished, click on the Create Quote button.

After saving, you will be directed to the Quotes/Orders/Invoices tab where you can begin to configure the products for the quote.

Related Content

- Edit Product Information within a Quote
- Quote vs Invoice