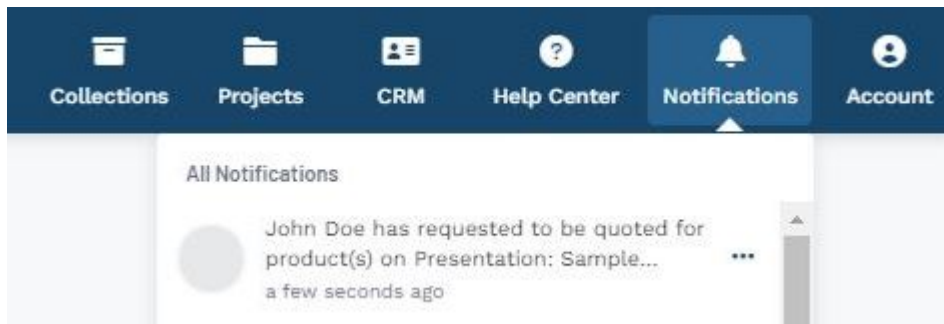# ESP+

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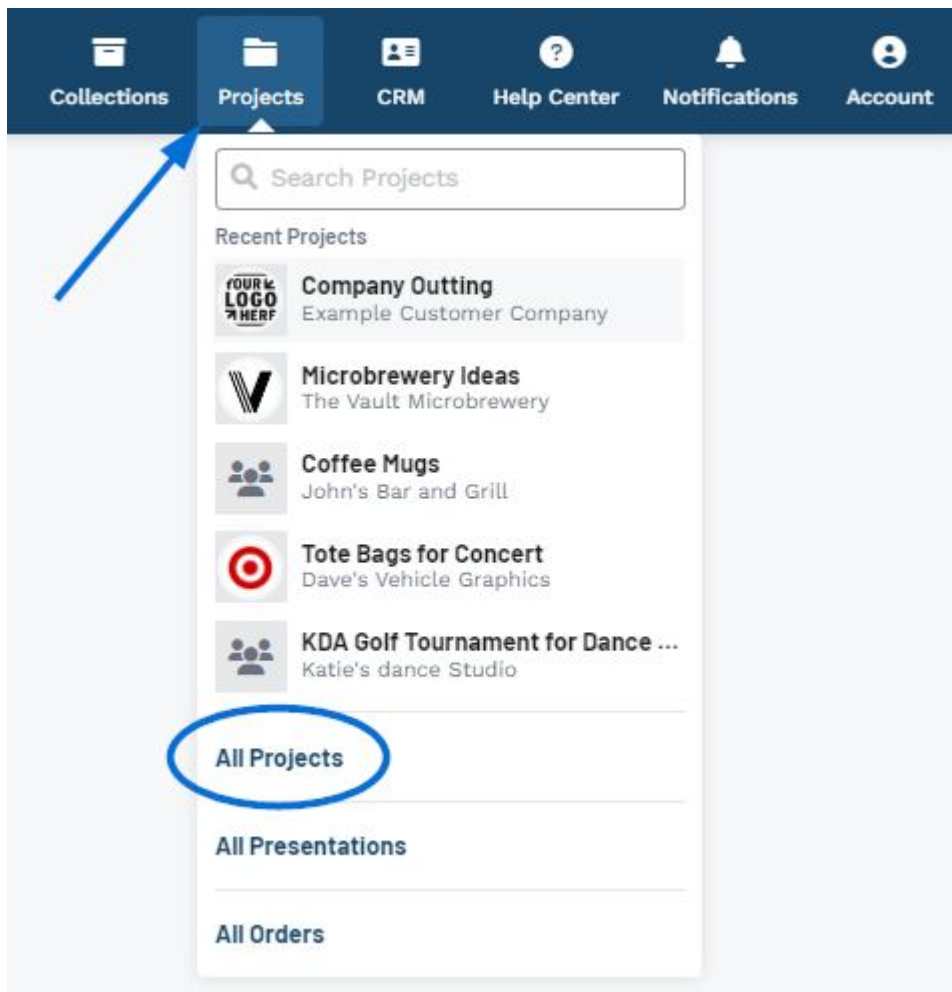
In the Projects area, locate the project and click on name to open it.

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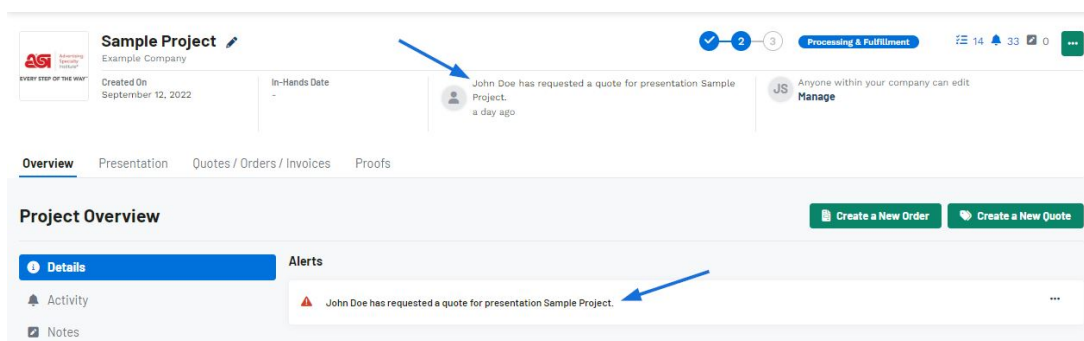
In the Quotes/Orders/Invoices section, the quote will be displayed in the dropdown.

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	Billing Contact
John Doe	**John Doe**
Example Company	Example Company
📍 4800 E Street Rd	📍 4800 E Street Rd
Feasterville-Trevose, PA 19053	Feasterville-Trevose, PA 19053
United States	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	Quote Expires
December 21, 2022	January 3, 2023

Quote Contact	Sales Person
Jennifer Shinberg	Jenn Shinberg

PO Reference	Payment Method
-	-

Discount %	Credit Terms
-	-

In-Hands Date	Ship Date
January 18, 2023	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.

Decoration

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

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.

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.

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.

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.

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.

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](#)