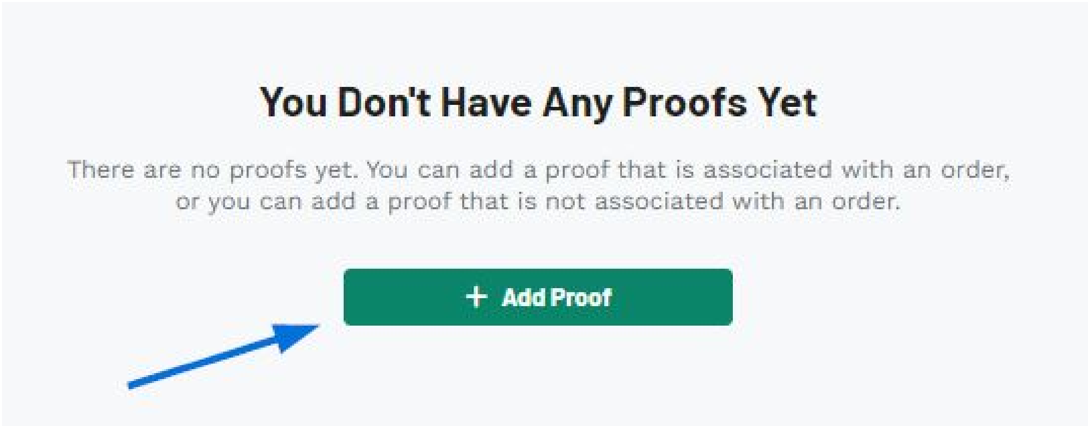
ESP+

Proofs

Jennifer M - 2023-05-04 - Quotes & Proofs

In the Proofs tab of the Project, you can create proofs to send to the customer for approval.

Click on the "+Add Proof" button to create a new proof.



In the Add Proof to Order window, click on the Choose Image to Upload button to browse your computer and upload an image or drag the image from a folder on your computer and drop it into the available box. You can then use the options below the image to enter additional information for this proof, such as a Proof Name, Order Number, Product, Imprint Location, and/or Select Variant.

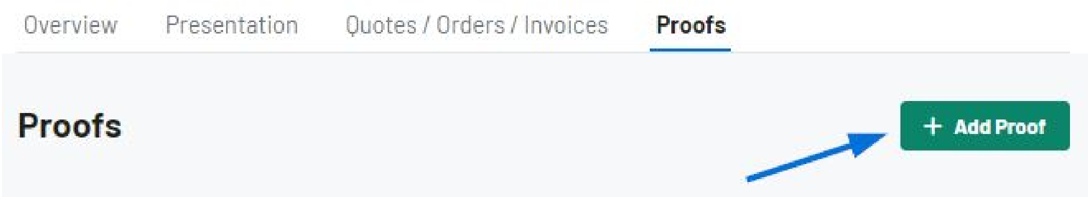
If the customer must approve this proof, select the "Yes" option and then use the "Approve By" Date dropdown select the date.

See this in action!

The newly created proof will be listed in the Proofs area. If you need to edit or delete this proof, click on the three dot icon and select the option you need. Additionally, if the customer conveyed their approval outside of their client portal, you can choose to mark this proof as approved.

Can I create more than one proof for an order? (click for answer)

Yes, you can create as many proofs as you like for an order by clicking on the "Add Proof" button.

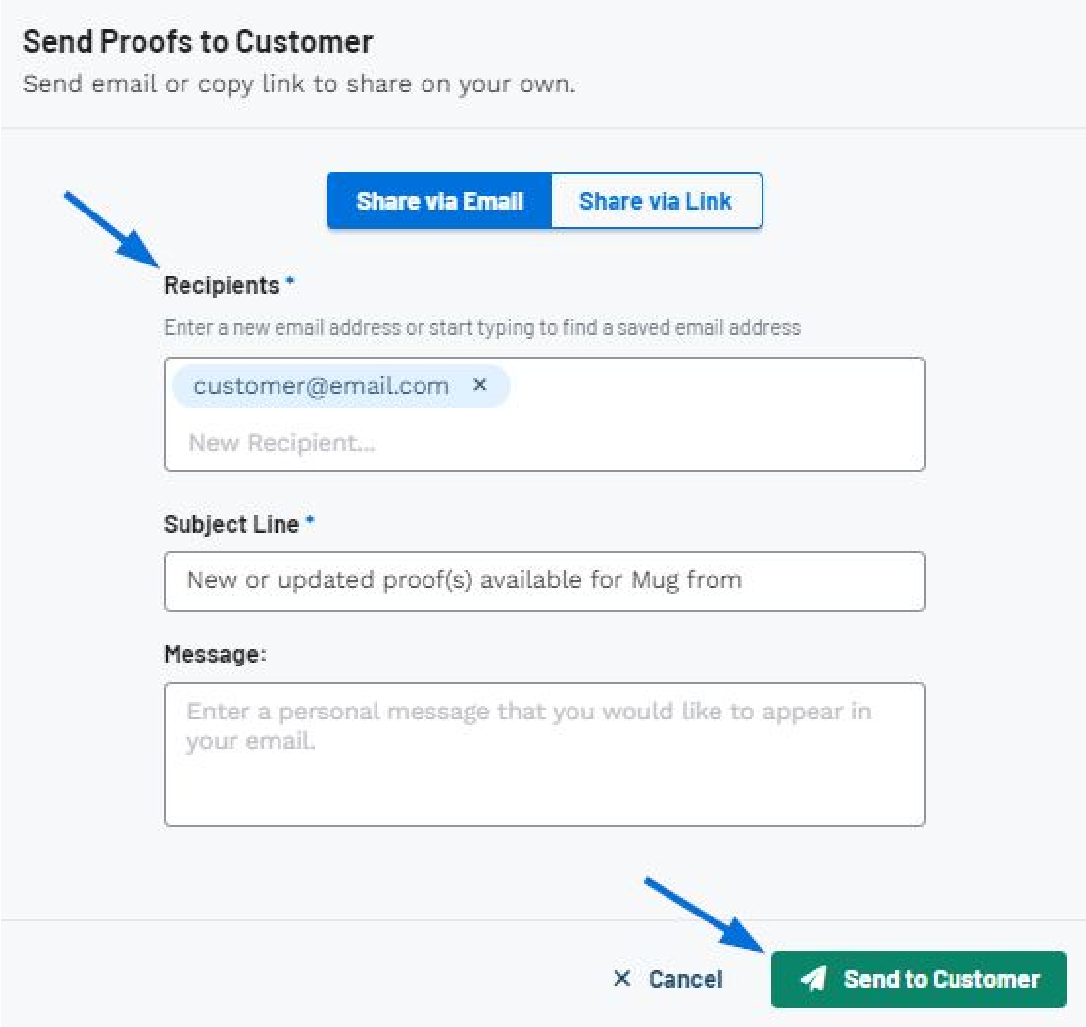


To send the proof to the customer for approval, click on the Send Proof button.

There are two options available in the Send Proofs to Customer window.

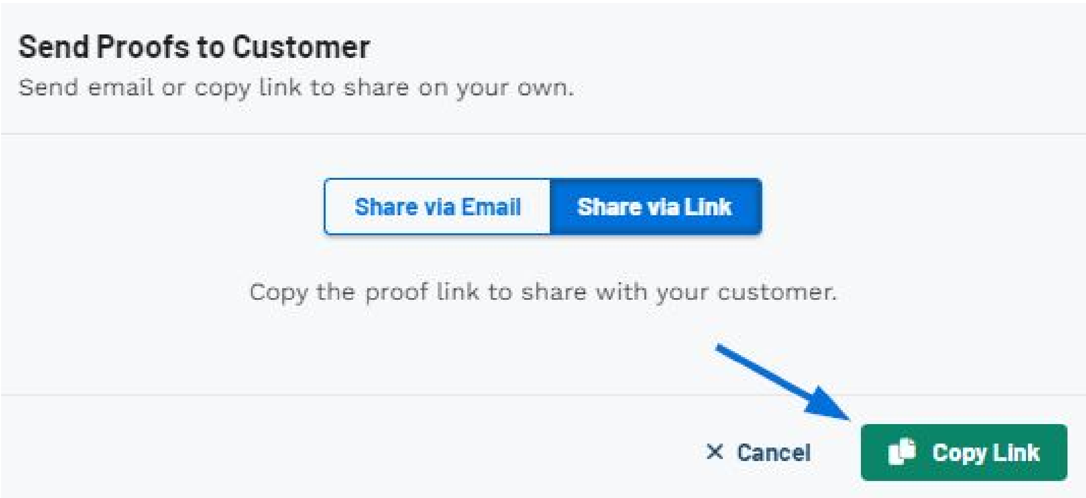
Share via Email

When sharing a proofs with a customer via email, the address in the customer's CRM record will be displayed. If no email address exists for this customer or you'd like to send to a different email, you can enter one in the Recipients box. The Subject Line and Message can be customized in the Email and Message Templates section of the Account - Settings section.



Share via Link

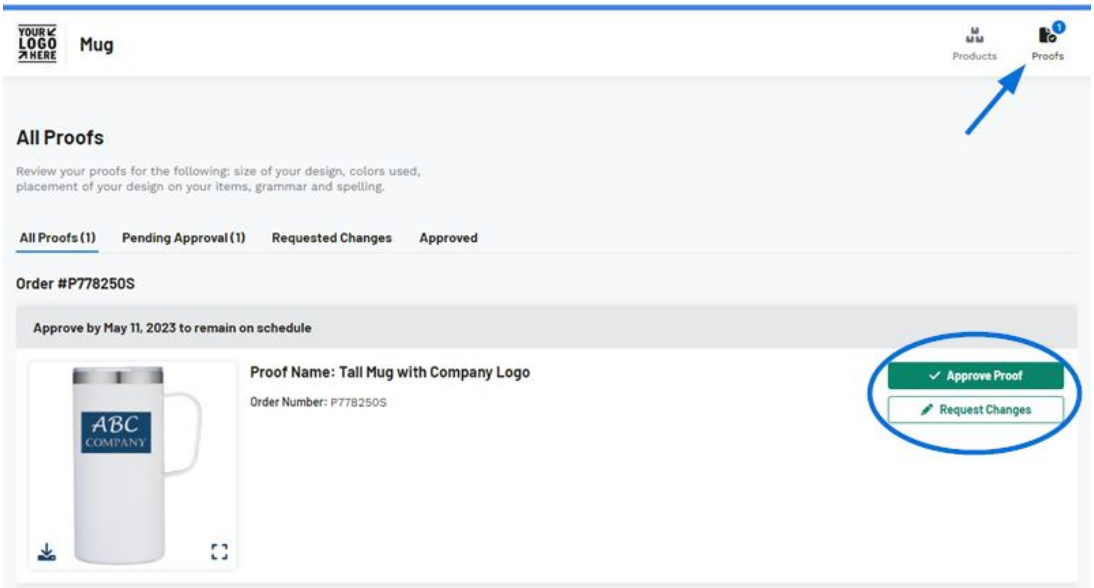
Click on the Copy Link button.



The proof will now be available on the client portal. The customer can view the proof, request changes, or approve it.

What will my customer see?   (click for answer)

When the customer goes to the Client Portal, they will have an icon for proofs at the top. When they click on it, they will be brought into the All Proofs tab. In this tab, they can view every proof related to this order. They can then click on the Approve Quote button or use the Request Changes option to communicate any revisions or concerns about this proof.



Proofs will also be organized for the customer into three tabs:

- Pending Approval:
  Contains all proofs which have not yet been acted upon by the customer.
- Requested Changes:
  Contains proofs where the customer has submitted revisions.
- Approved:
  Contains all approved proofs.

Can my customer download a proof?   (click for answer)

Yes, customers can download proofs by clicking on this icon located in the lower left corner of the proof image. They can also use the icon in the lower right corner of the image to open a full size preview of the image.

When the customer approved a proof through their Client Portal, you will recieve a notification regarding the approval.

Additionally, the proof listing itself will be displayed with a green bar across the top.