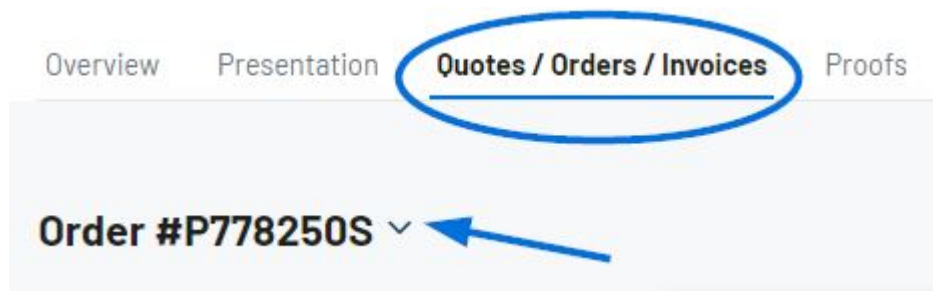


Send Order Acknowledgements and Sales Orders

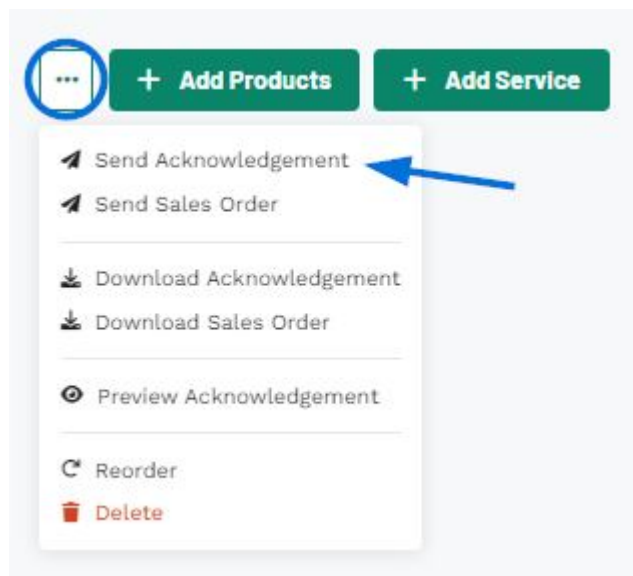
Jennifer M - 2023-05-03 - Orders

Once you have finished [configuring a new order](#) or [converting the order from a quote](#), you can send an order acknowledgement to your customer or share the master sales order with coworkers. In the Quotes/Orders/Invoices tab of the project, make sure the order is the selected sales document.



Send Order Acknowledgement to Customer

Click on the three dot icon and select Send Acknowledgement.



Within the share button there are two options:

Share via Email

When sharing an order acknowledgement 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.

Send Order to Customer
Send an email or copy a link to share the order on your own.

[Share via Email](#) [Share via Link](#)

Recipients *
Enter a new email address or start typing to find a saved email address

customer@emailaddress.com x

New Recipient...

Subject Line *

New Order Acknowledgement P778250S from ASI Test Distributor

Email Message

Hello,

Thank you for your business. Please sign this Order Acknowledgement. We appreciate your business and look forward to working with you again soon.

☒ Attach PDF

[Preview Order](#) [Send to Customer](#)

You can click on the Preview Order button to view the customer's portal and once you're ready, click on the Send to Customer button.

Share via Link

You can click on the Preview Order button to view the customer's portal and once you're ready, click on the Copy Link button.

Send Order to Customer
Send an email or copy a link to share the order on your own.

[Share via Email](#) [Share via Link](#)

[Preview Order](#) [Copy Link](#)

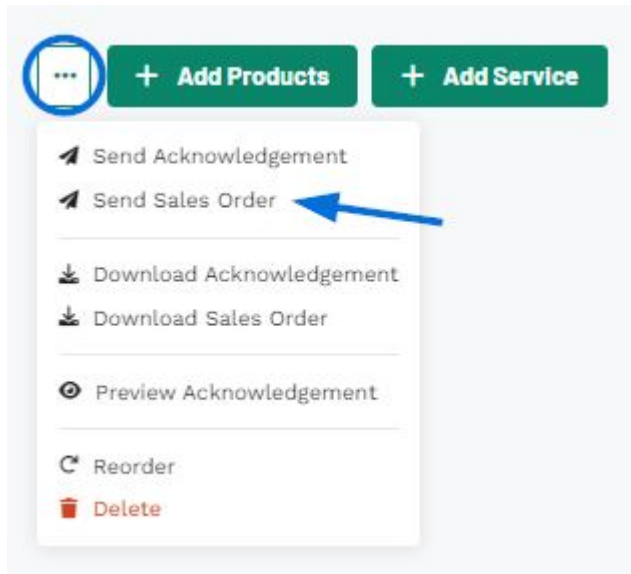
The order acknowledgement will now be available on the client portal for the customer to

review.

Send Order

Sending the master sales order via email enables you to share the order information, including net cost and supplier information, as a PDF.

Click on the three dot icon and select Send Sales Order.



When sharing the sales order, enter the person's email address in the recipients box. The Subject Line and Message can be customized in the Email and Message Templates section of the Account - Settings section.

Send Sales Order

WARNING: This document contains costing and vendor details and should only be shared internally.

Recipients *

Enter a new email address or start typing to find a saved email address

coworker@mycompany.com x

New Recipient...

Subject Line *

New Sales Order P778250S from ASI Test Distributor for Customer :Exa

Email Message

Hello,

Please review this Sales OrderP778250S. Please review Order Total
176.91.
NOT SET

☒ Attach PDF

X Cancel

 Send Sales Order