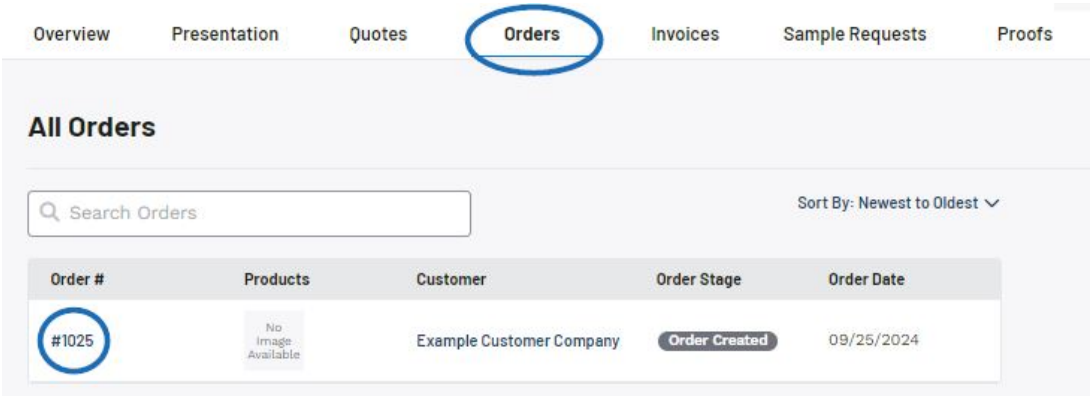
ESP+

Send Orders

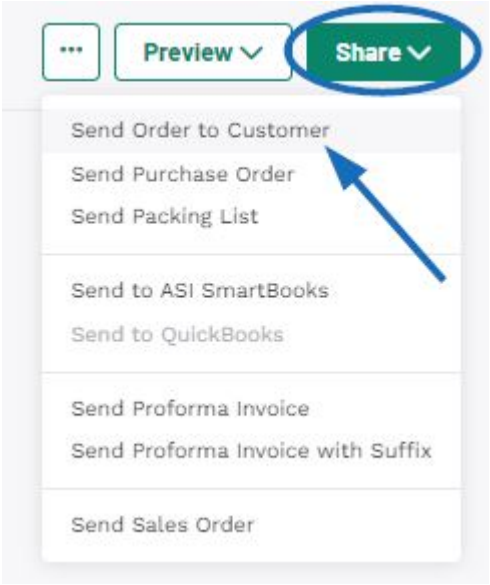
Jennifer M - 2024-09-26 - Orders

Once you have finished configuring a new order or converting the order from a quote, you can send the order to your customer or share the master sales order with coworkers. In the Orders section of the project, click on the order number to open it.



Send Order to Customer

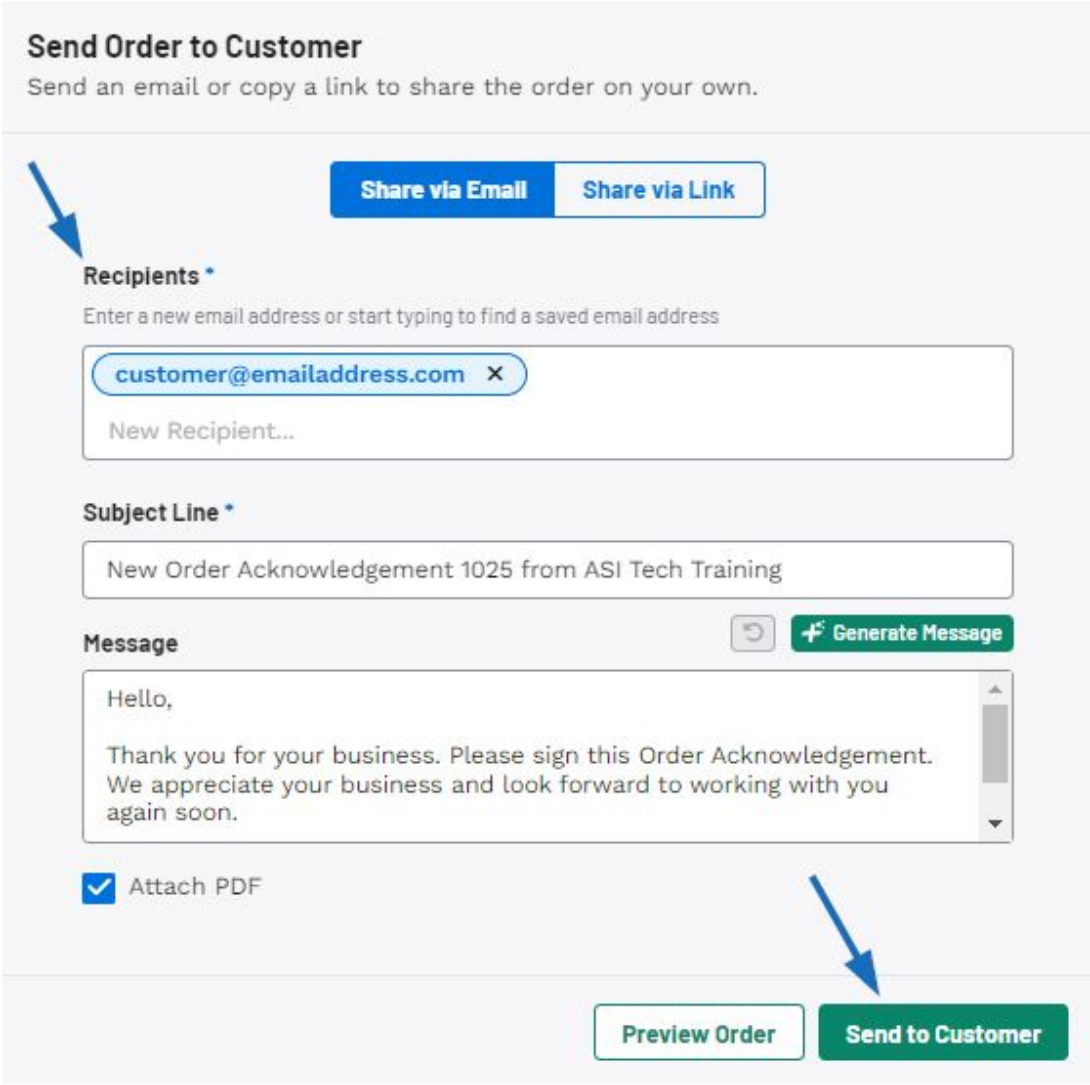
Click on the Share button and select Send Order to Customer.



Within the share button there are two options:

Share via Email

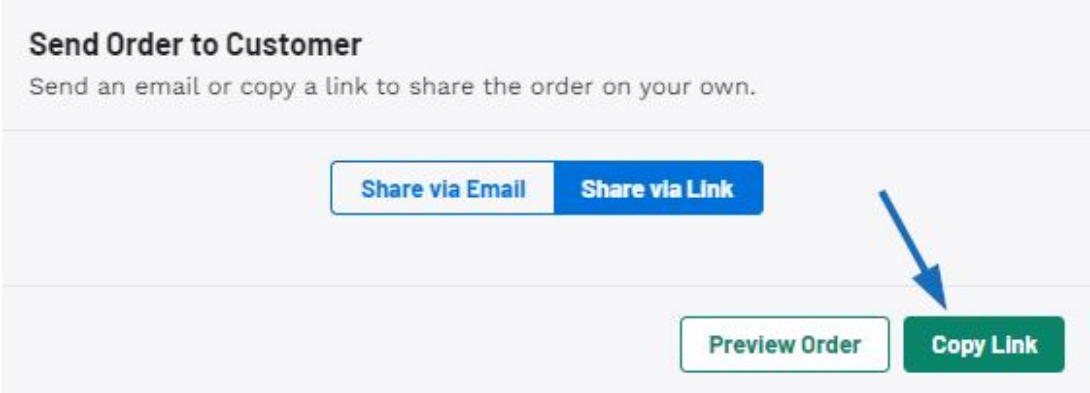
When sharing an order acknowledgement with a customer via email, the address in the customer's CRM record will be displayed. If no email address exists for this customer or you'd like to send to a different email, you can enter one in the Recipients box. The Subject Line and Message can be customized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



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.

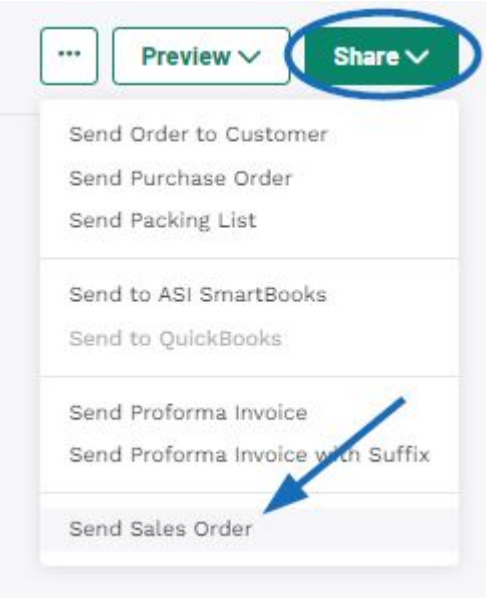


The order acknowledgement will now be available on the client portal for the customer to review.

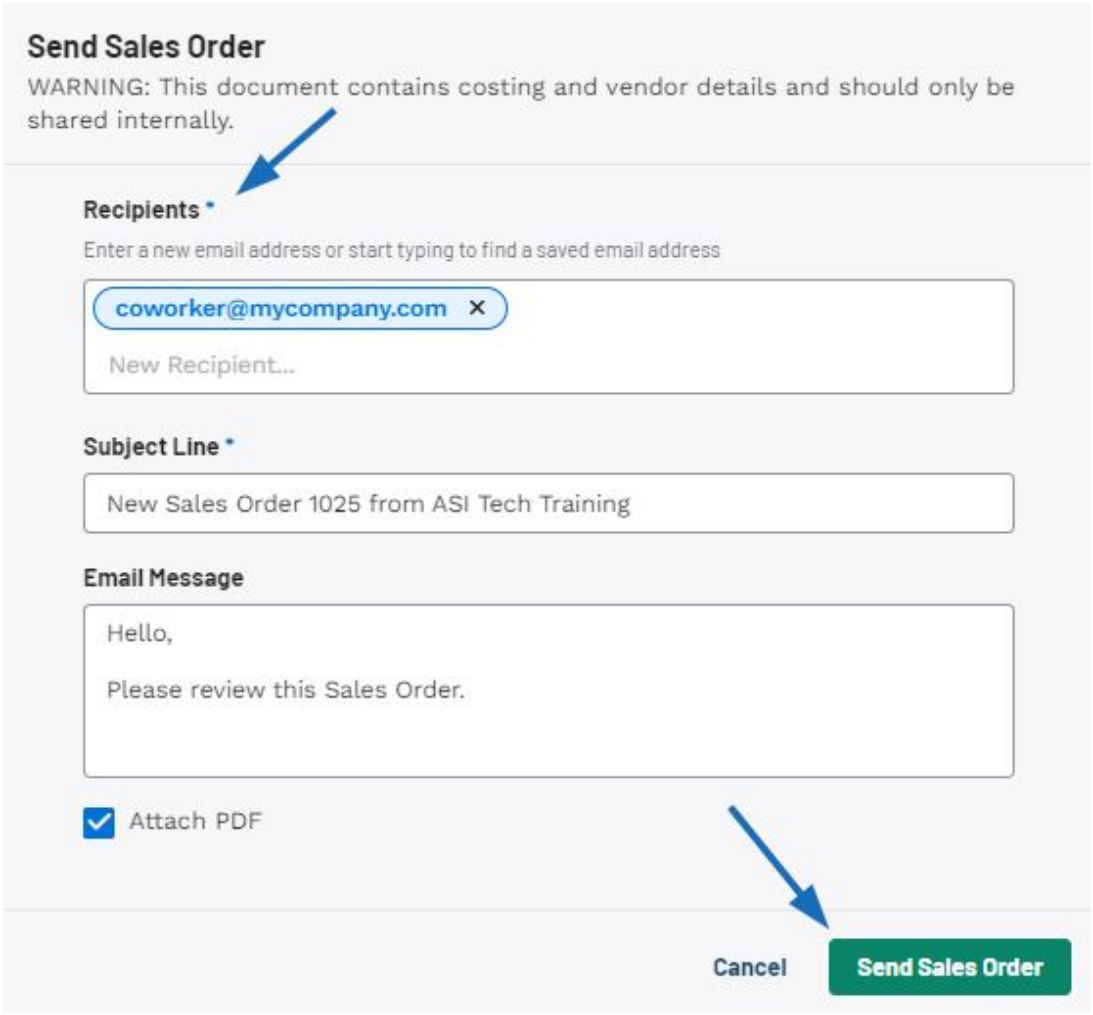
Send Order

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 Share button 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
New Recipient...
Subject Line *
New Sales Order 1025 from ASI Tech Training
Email Message
Hello,
Please review this Sales Order.
Attach PDF
Cancel
Send Sales Order