

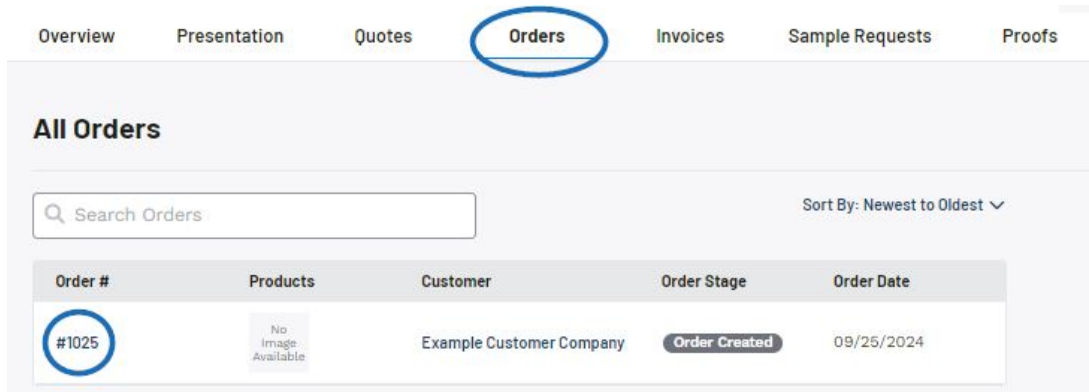
ESP+

Product Support > Quotes, Orders & Invoices > Orders > Send Orders

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.



Overview Presentation Quotes **Orders** Invoices Sample Requests Proofs

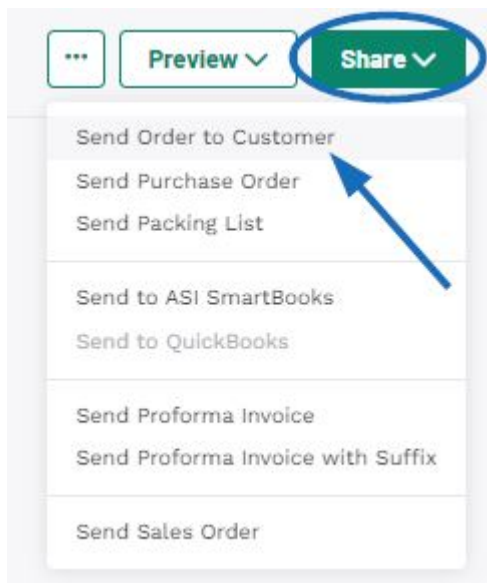
All Orders

Search Orders Sort By: Newest to Oldest ▾

Order #	Products	Customer	Order Stage	Order Date
#1025	No Image Available	Example Customer Company	Order Created	09/25/2024

Send Order to Customer

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



... Preview ▾ **Share ▾**

- Send Order to Customer
- Send Purchase Order
- Send Packing List
- Send to ASI SmartBooks
- Send to QuickBooks
- Send Proforma Invoice
- Send Proforma Invoice with Suffix
- Send Sales Order

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

New Recipient...

Subject Line *

Message ↺ [+ Generate Message](#)

▲
▼

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](#)

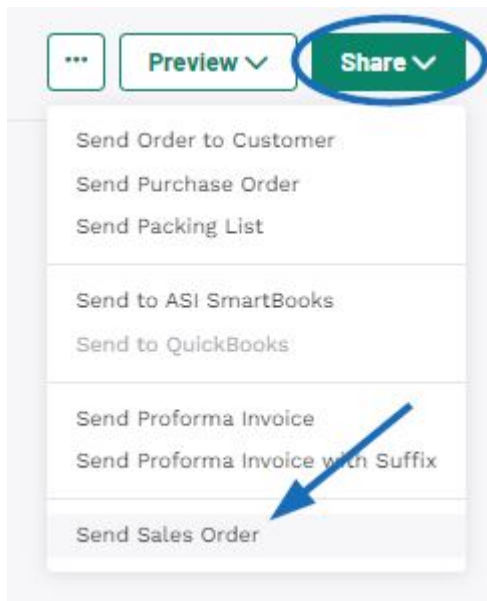
[Preview Order](#) [Copy Link](#)

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 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 x

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