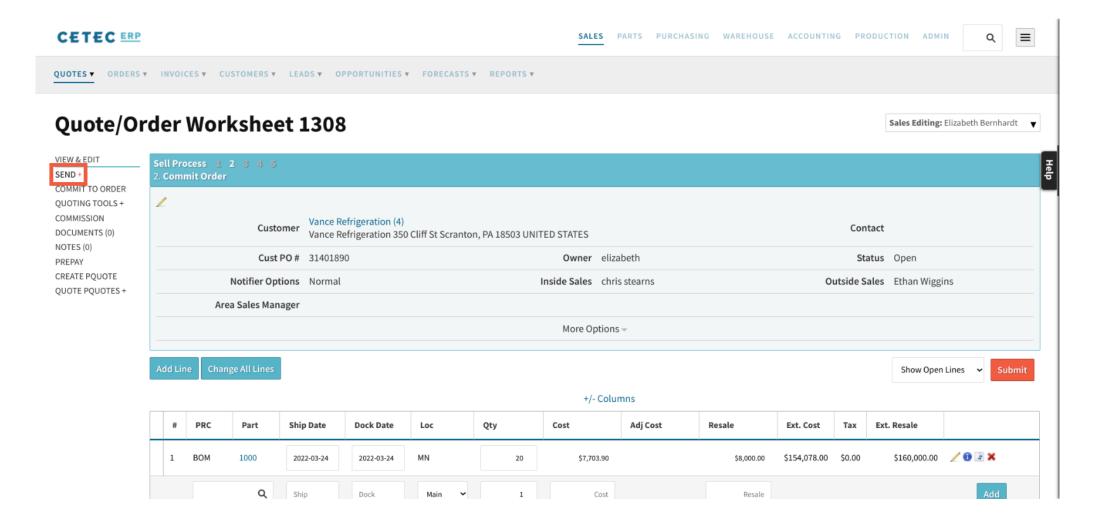
Cetec ERP

The first step is to open any Quote and click Send +



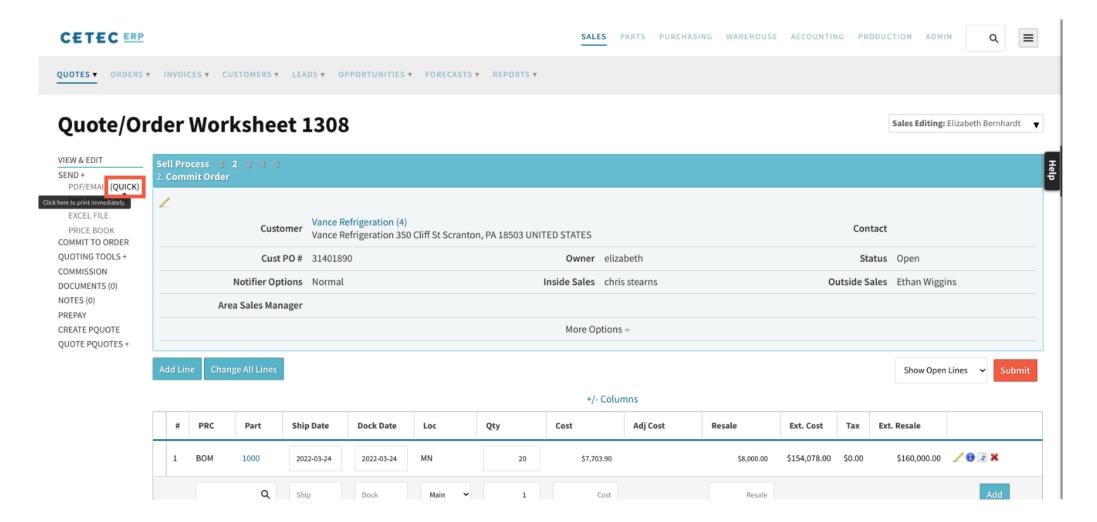
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How to Send a Quote

Cetec ERP

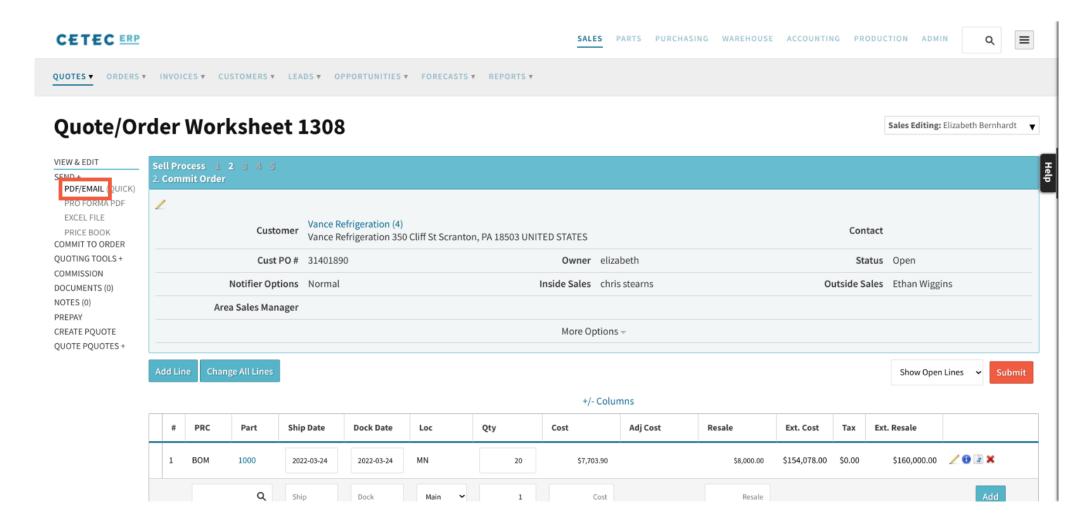
The first option is to click (Quick) Then a PDF will open that you can download.



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Cetec ERP

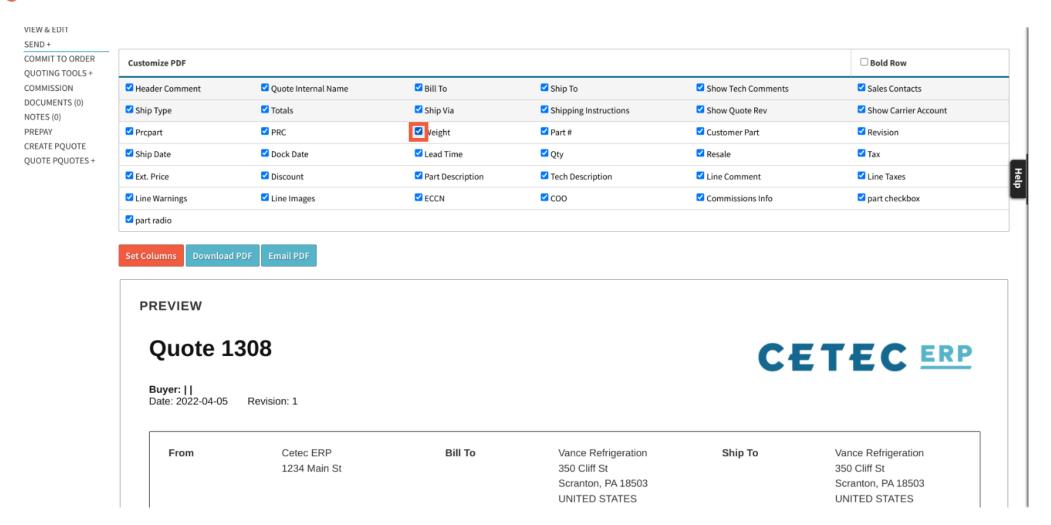
1 The other option is to click PDF/Email This will open up another screen.



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Cetec ERP

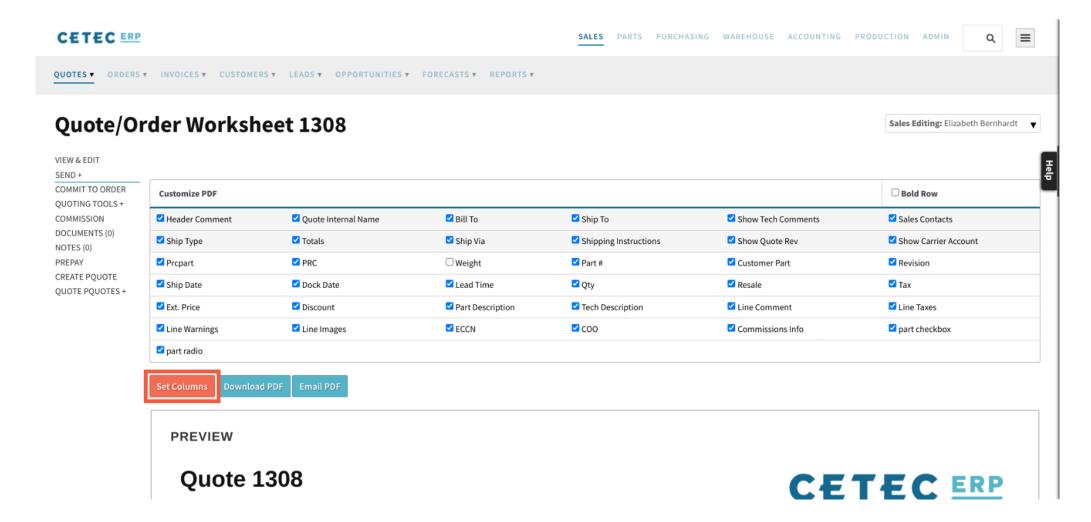
Here you can customize the PDF. Un-check any boxes you don't want to show on the PDF.



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Click Set Columns to save your changes.

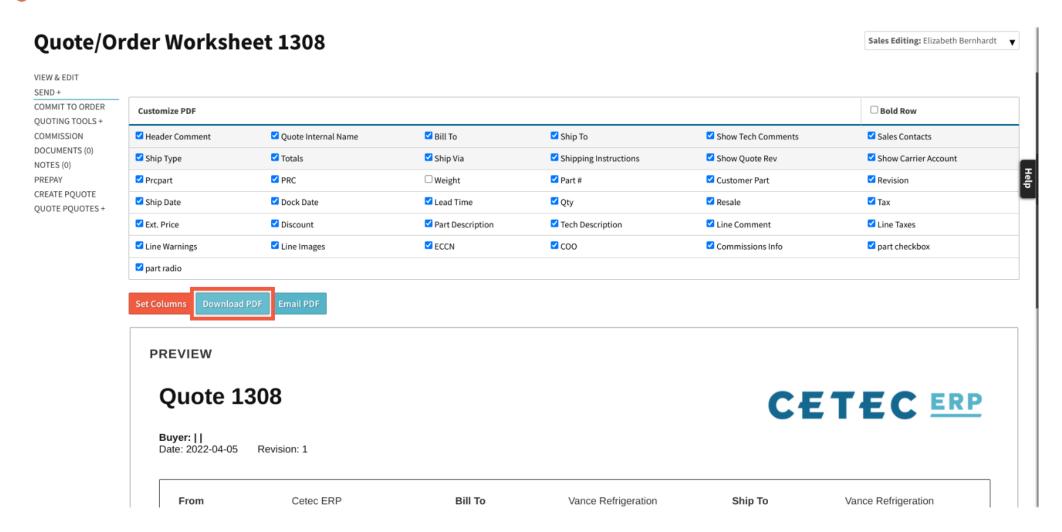


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There are two options. You can save the PDF by clicking Download PDF



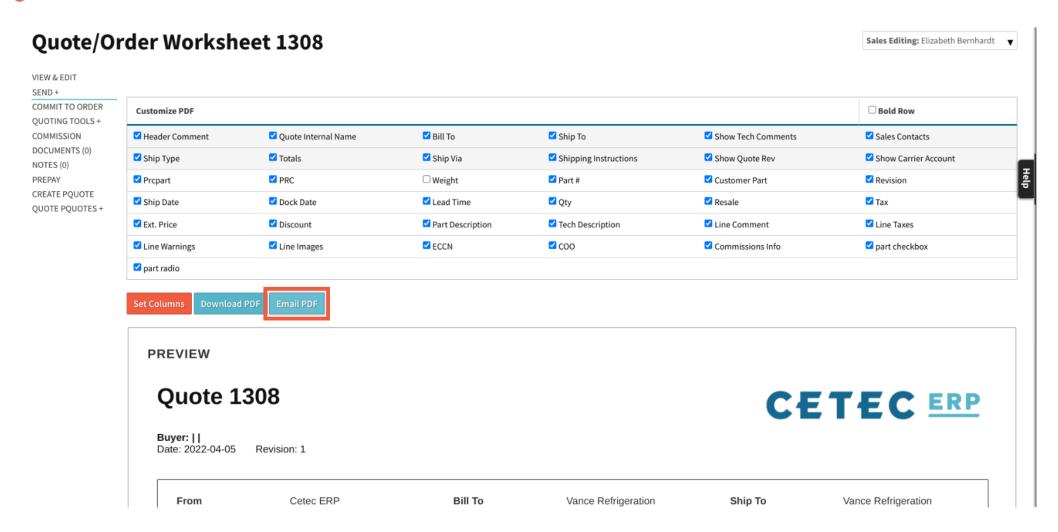
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How to Send a Quote

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The other option is to email the PDF directly to the customer by clicking Email PDF



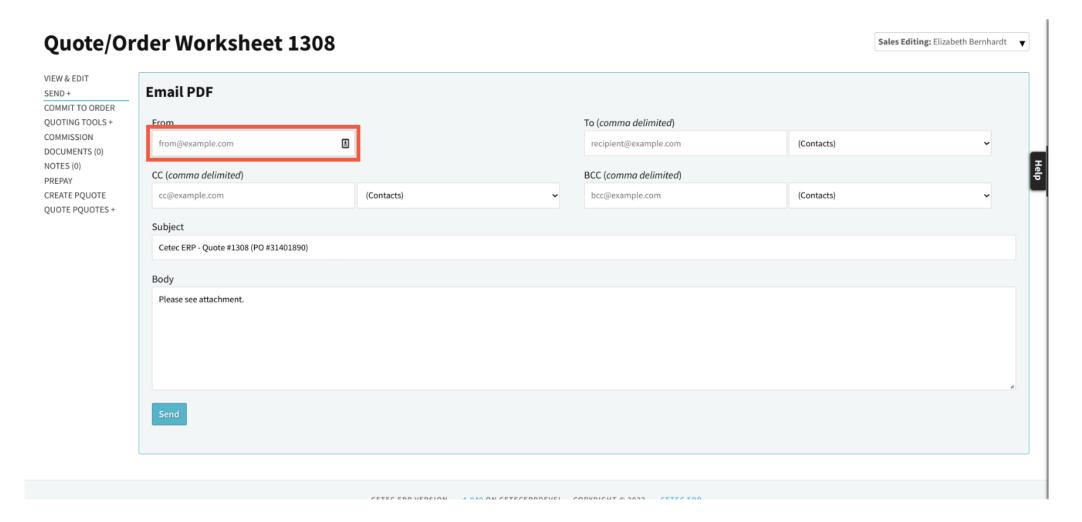
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How to Send a Quote

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• Here you can add the sender's email address.



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Add the recipient's email address and customize your body text. If you have uploaded any documents to this quote, they will be listed here in checklist form so you have the option to attach them. When your email is ready, click Send.

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Quote/Order Worksheet 1308 Sales Editing: Elizabeth Bernhardt ▼ VIEW & EDIT **Email PDF** SEND+ COMMIT TO ORDER QUOTING TOOLS + From To (comma delimited) COMMISSION from@example.com recipient@example.com (Contacts) DOCUMENTS (0) NOTES (0) CC (comma delimited) BCC (comma delimited) PREPAY CREATE PQUOTE cc@example.com (Contacts) bcc@example.com (Contacts) QUOTE PQUOTES + Subject Cetec ERP - Quote #1308 (PO #31401890) Body Please see attachment.

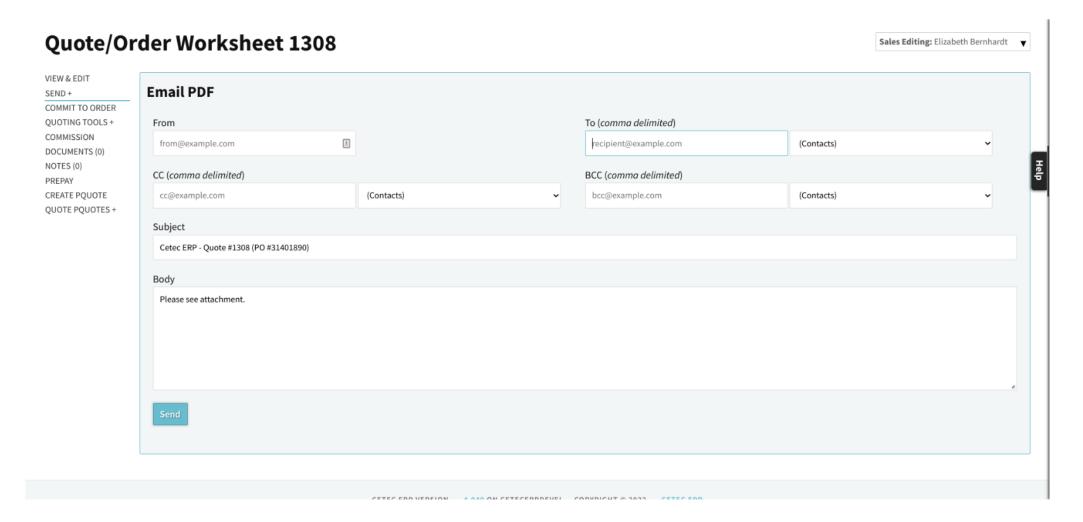
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That's it. You're done.



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