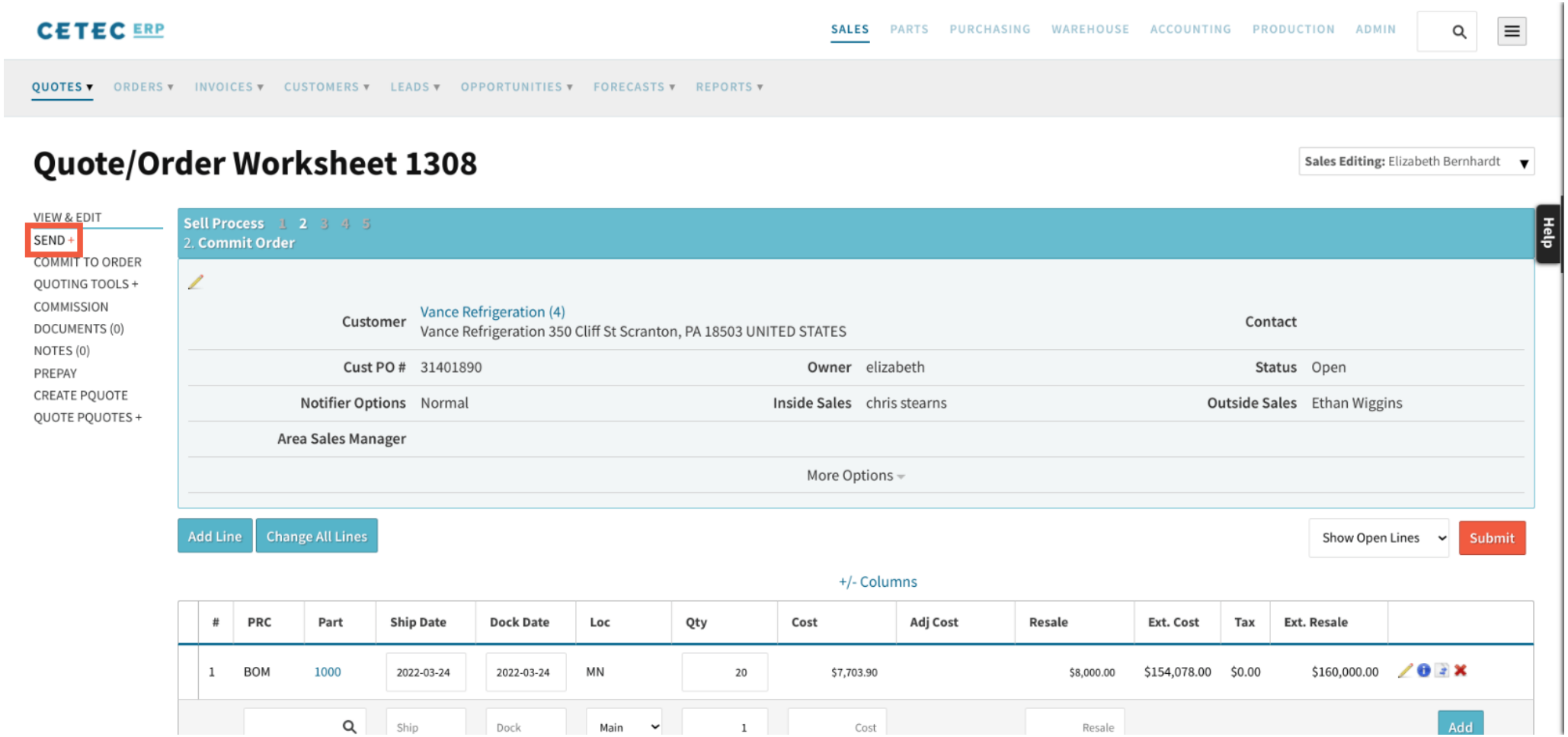
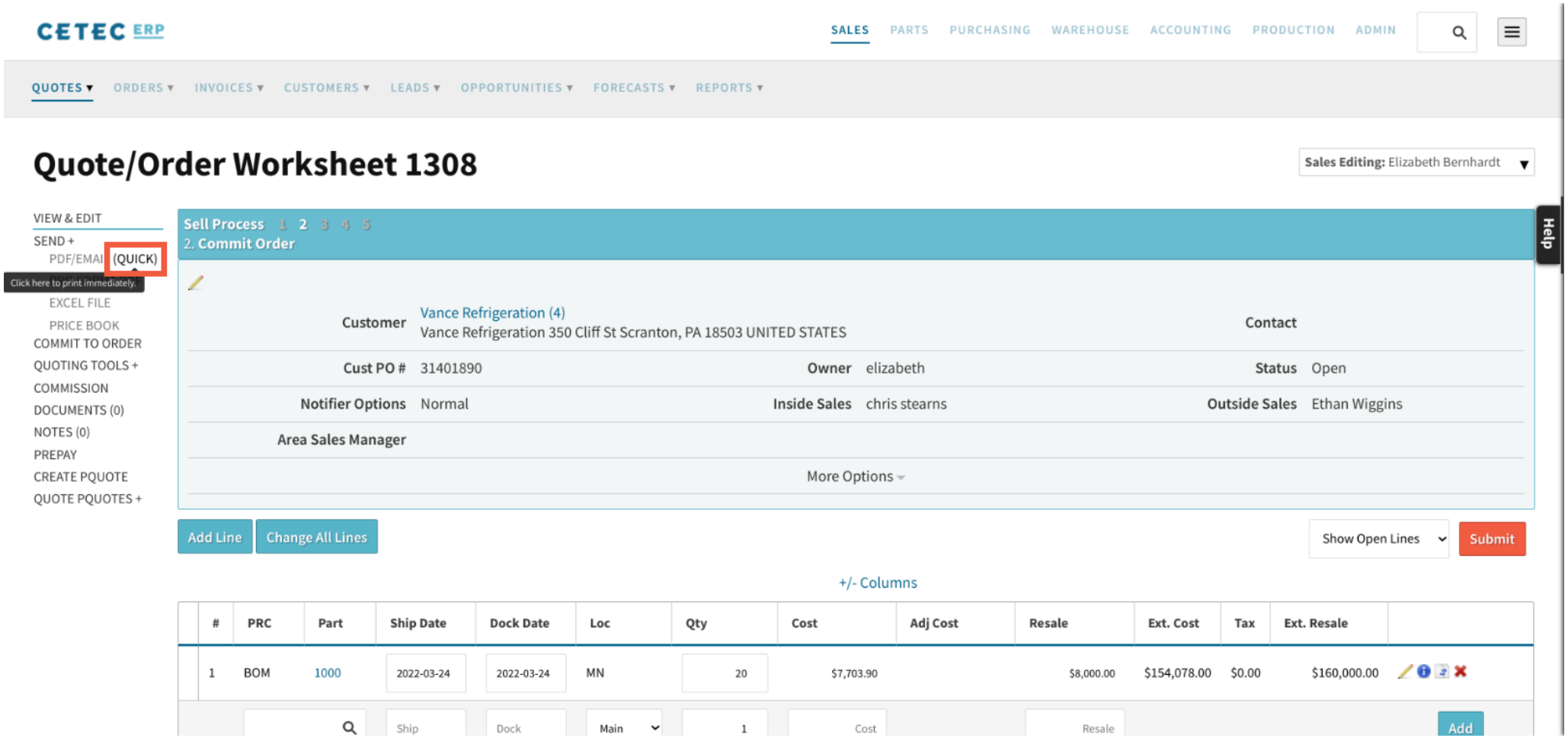
How to Send a Quote

Cetec ERP

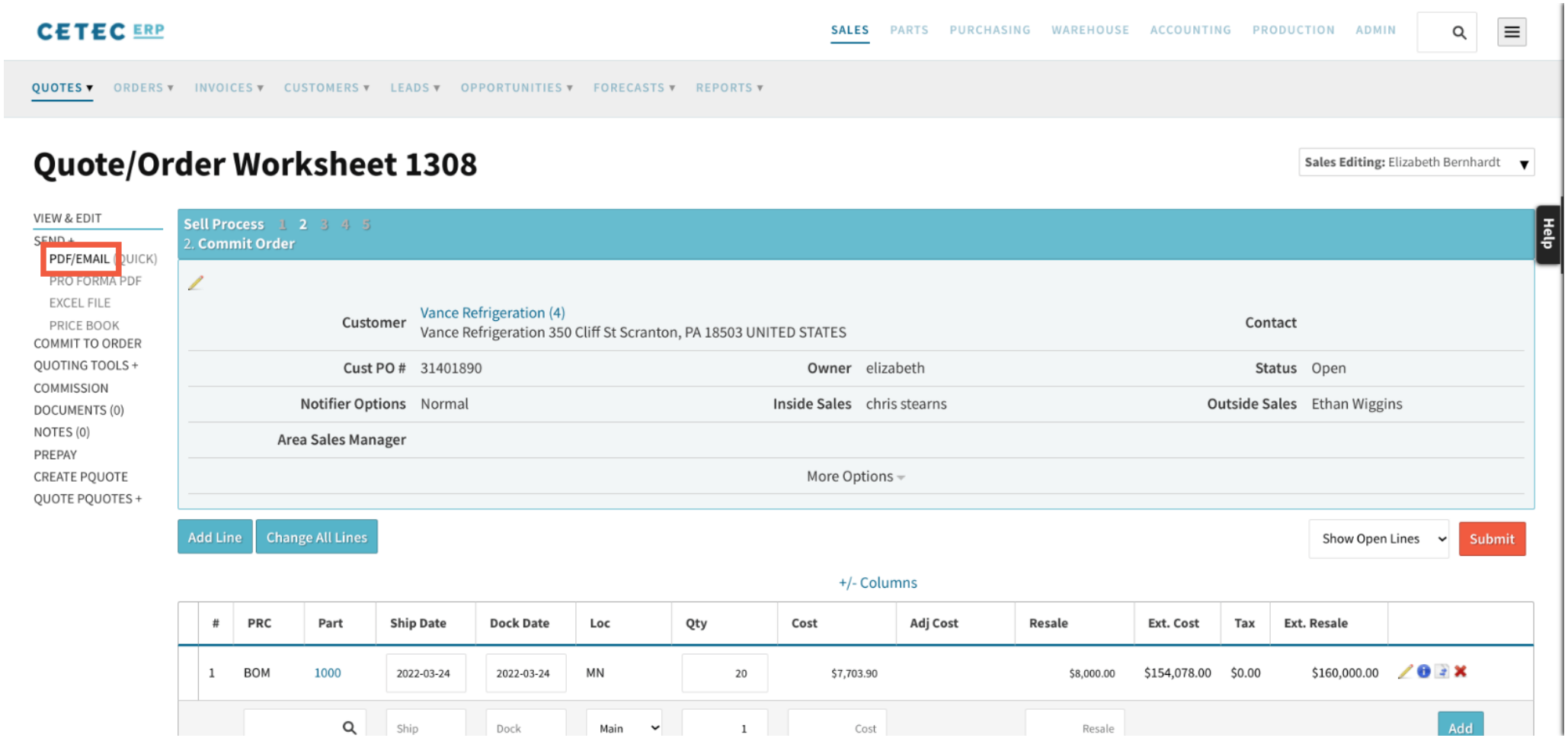
The first step is to open any Quote and click Send +



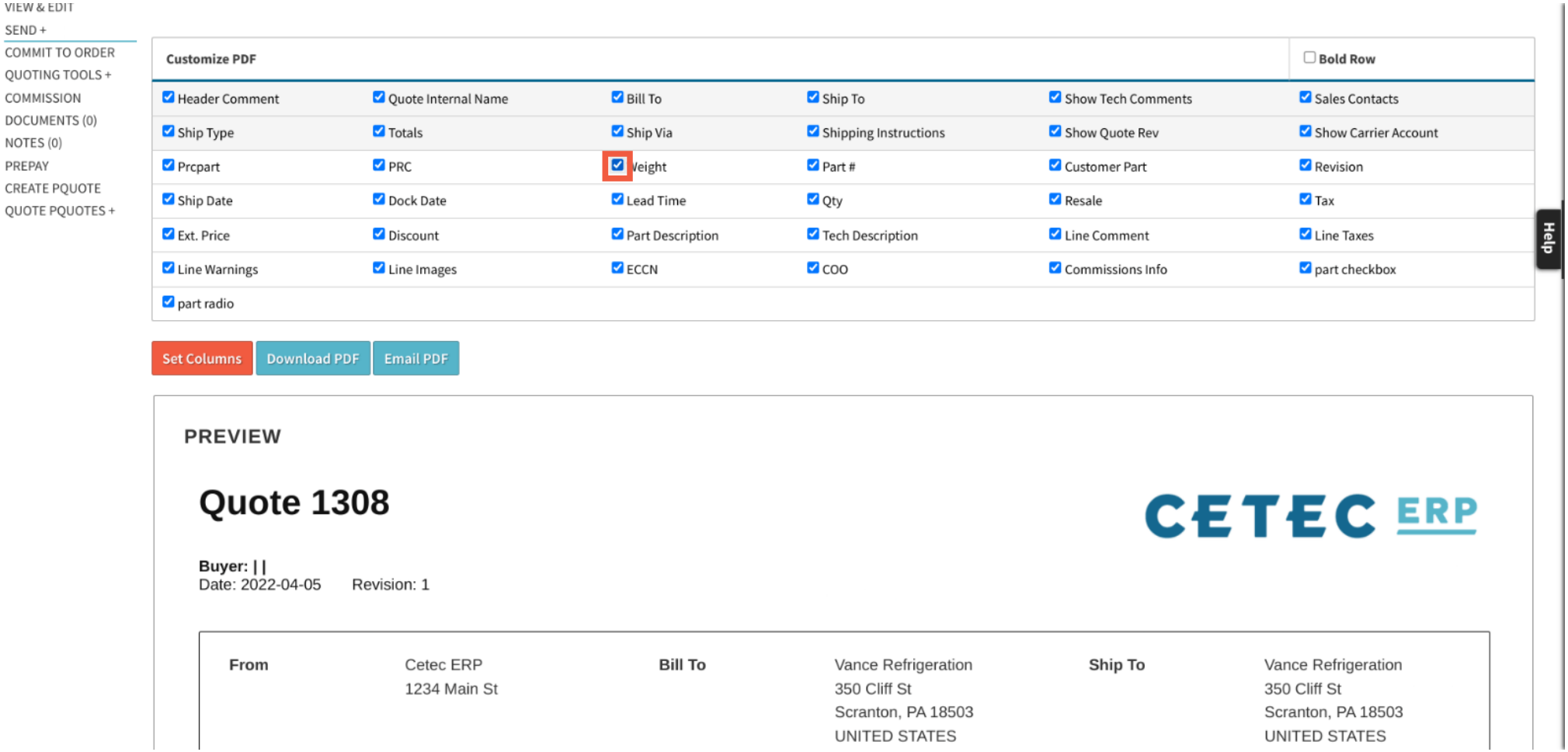
The first option is to click (Quick) Then a PDF will open that you can download.



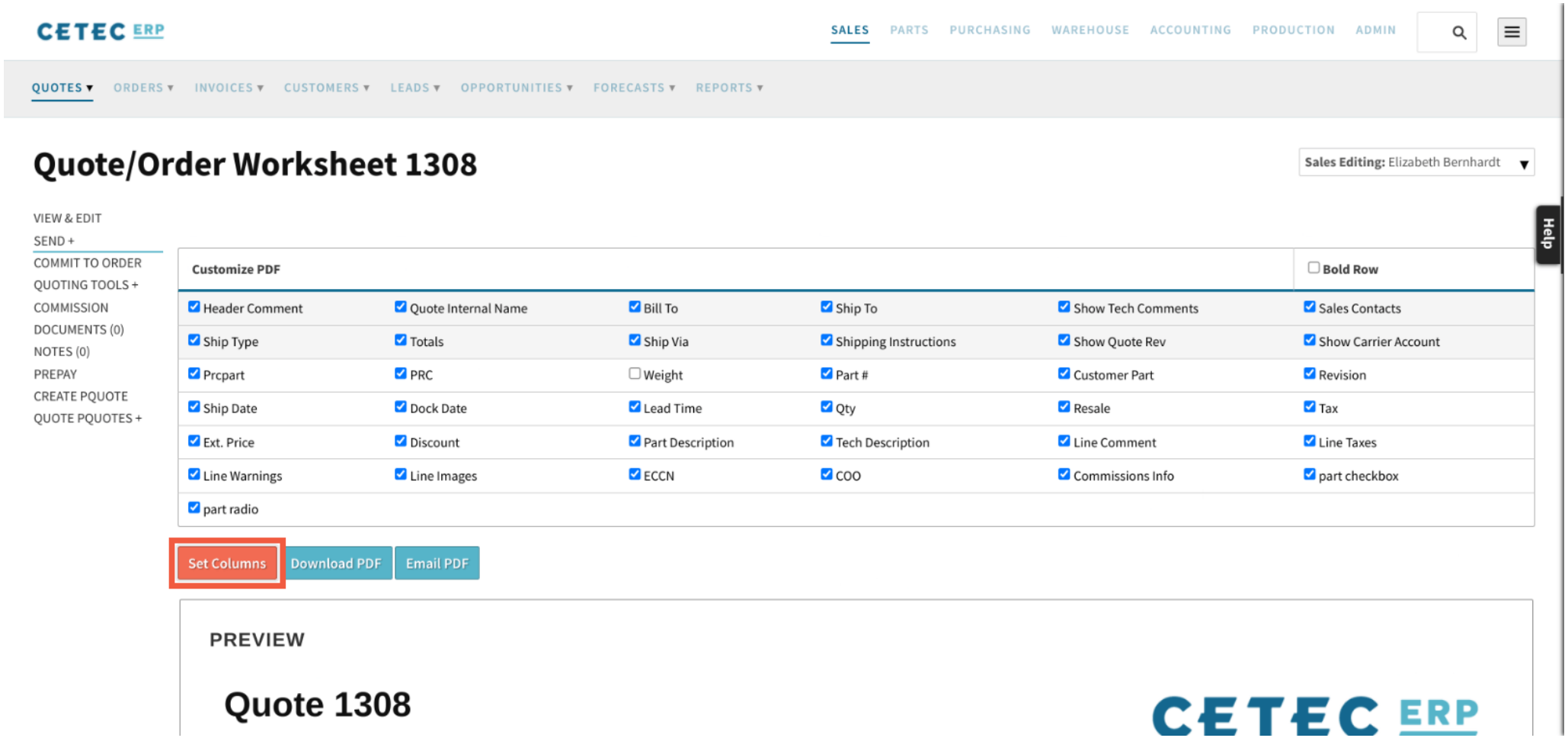
The other option is to click PDF/Email This will open up another screen.



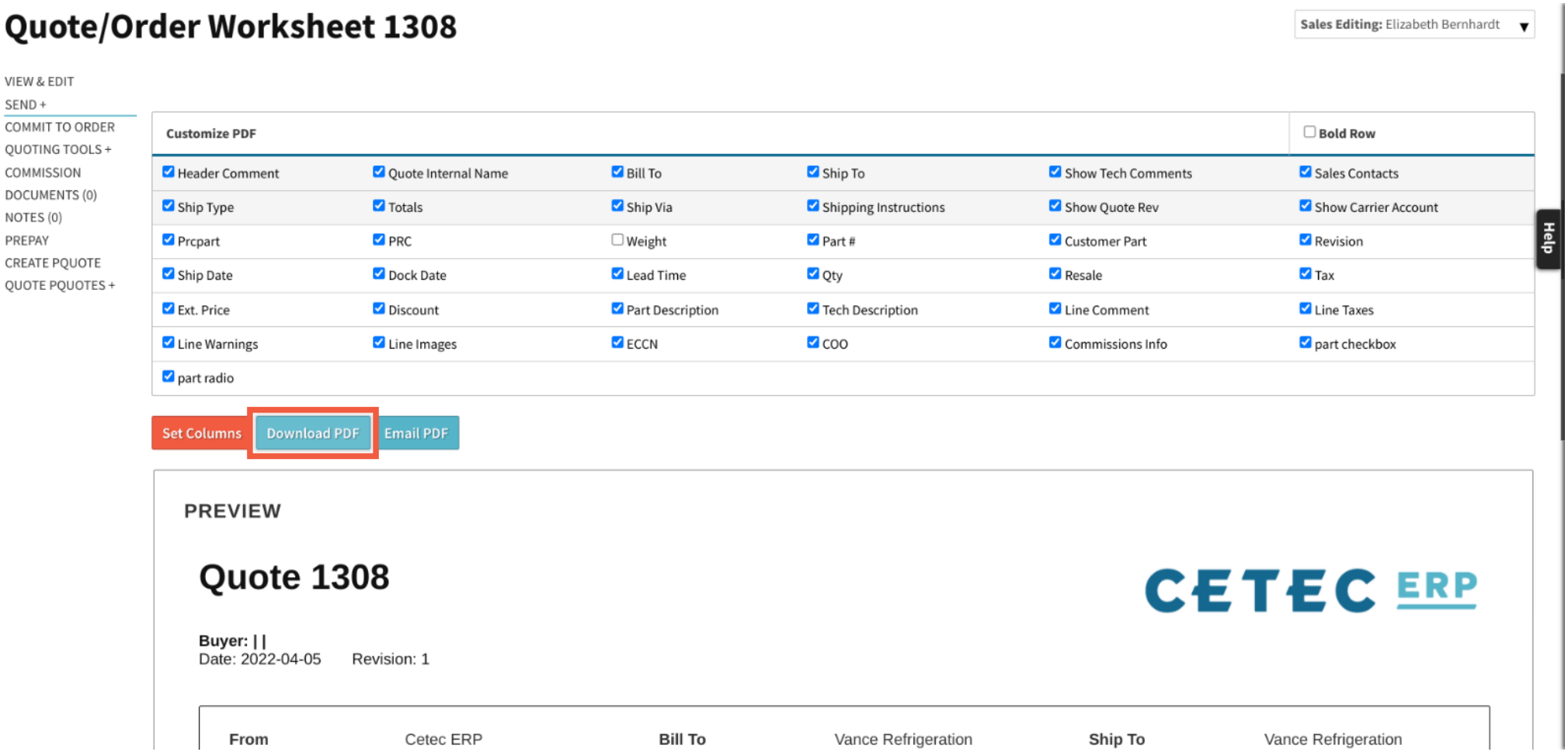
Here you can customize the PDF. Un-check any boxes you don't want to show on the PDF.



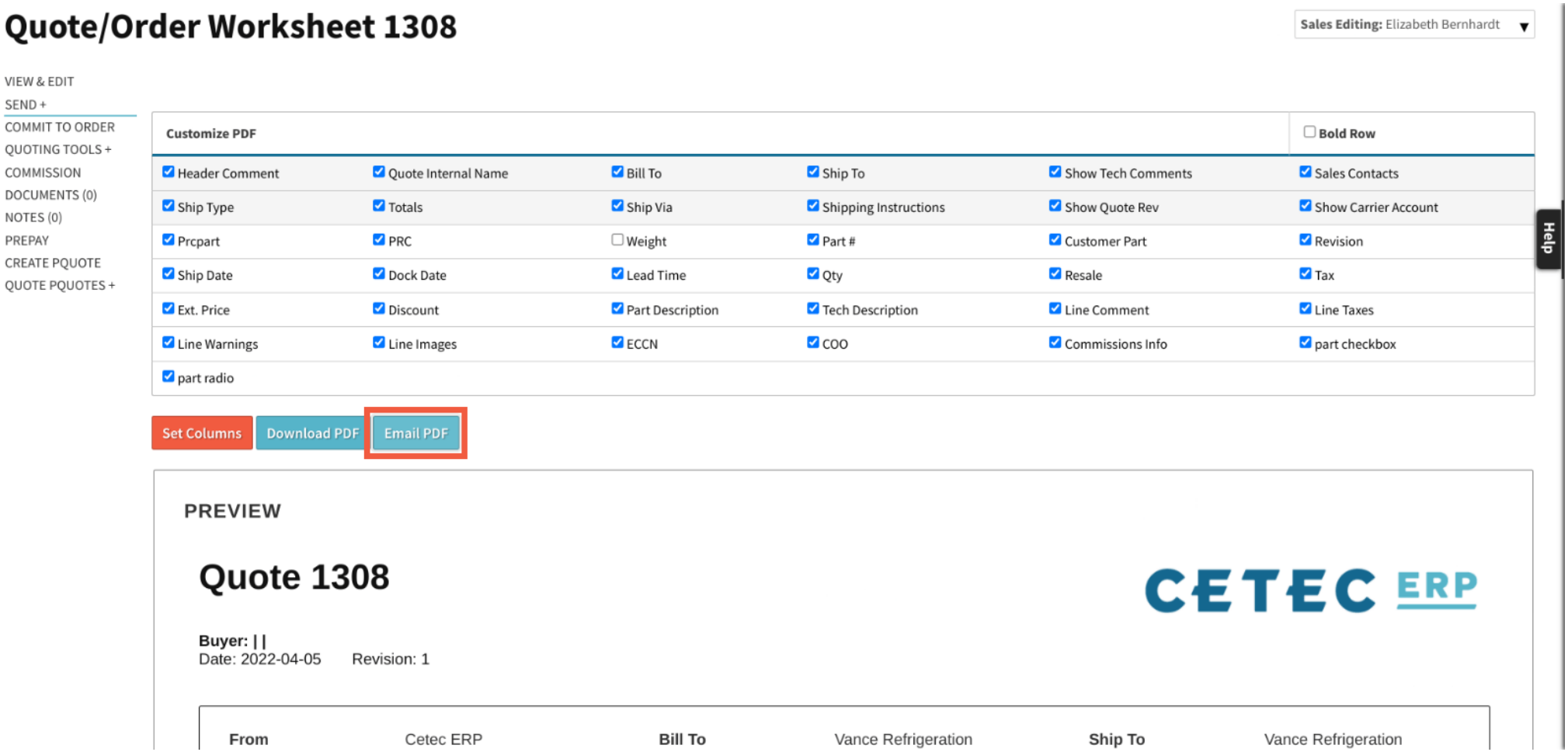
Click Set Columns to save your changes.



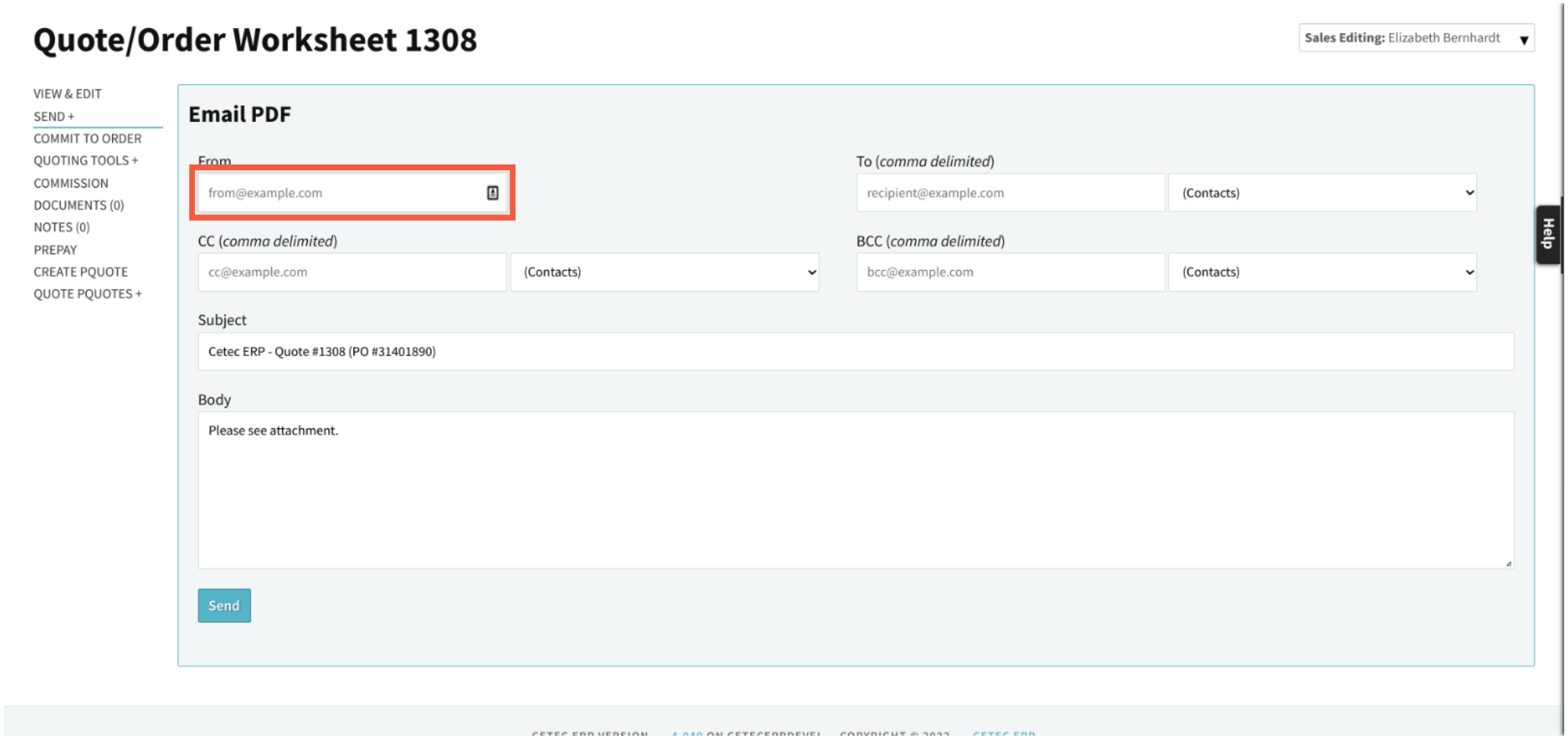
There are two options. You can save the PDF by clicking Download PDF



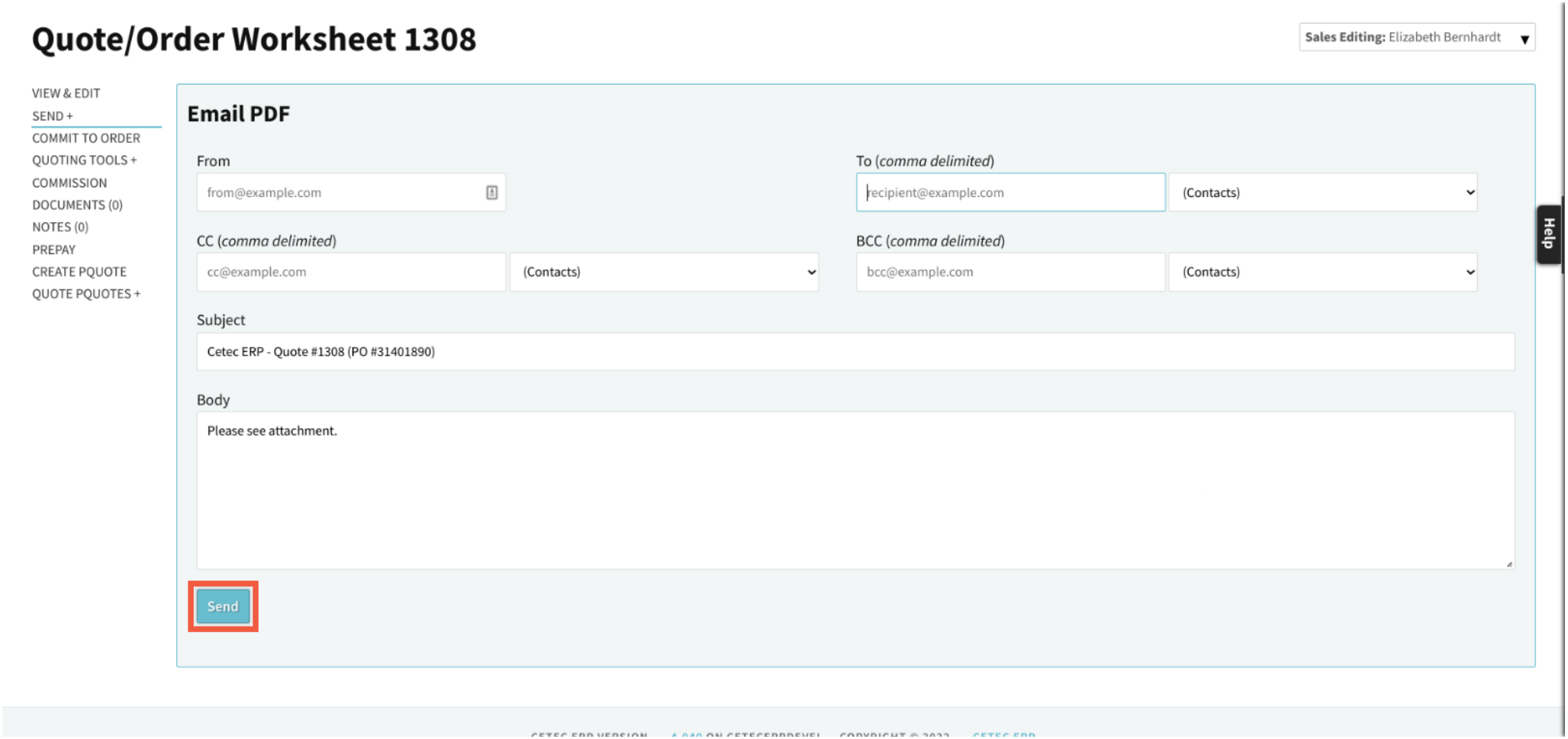
The other option is to email the PDF directly to the customer by clicking Email PDF



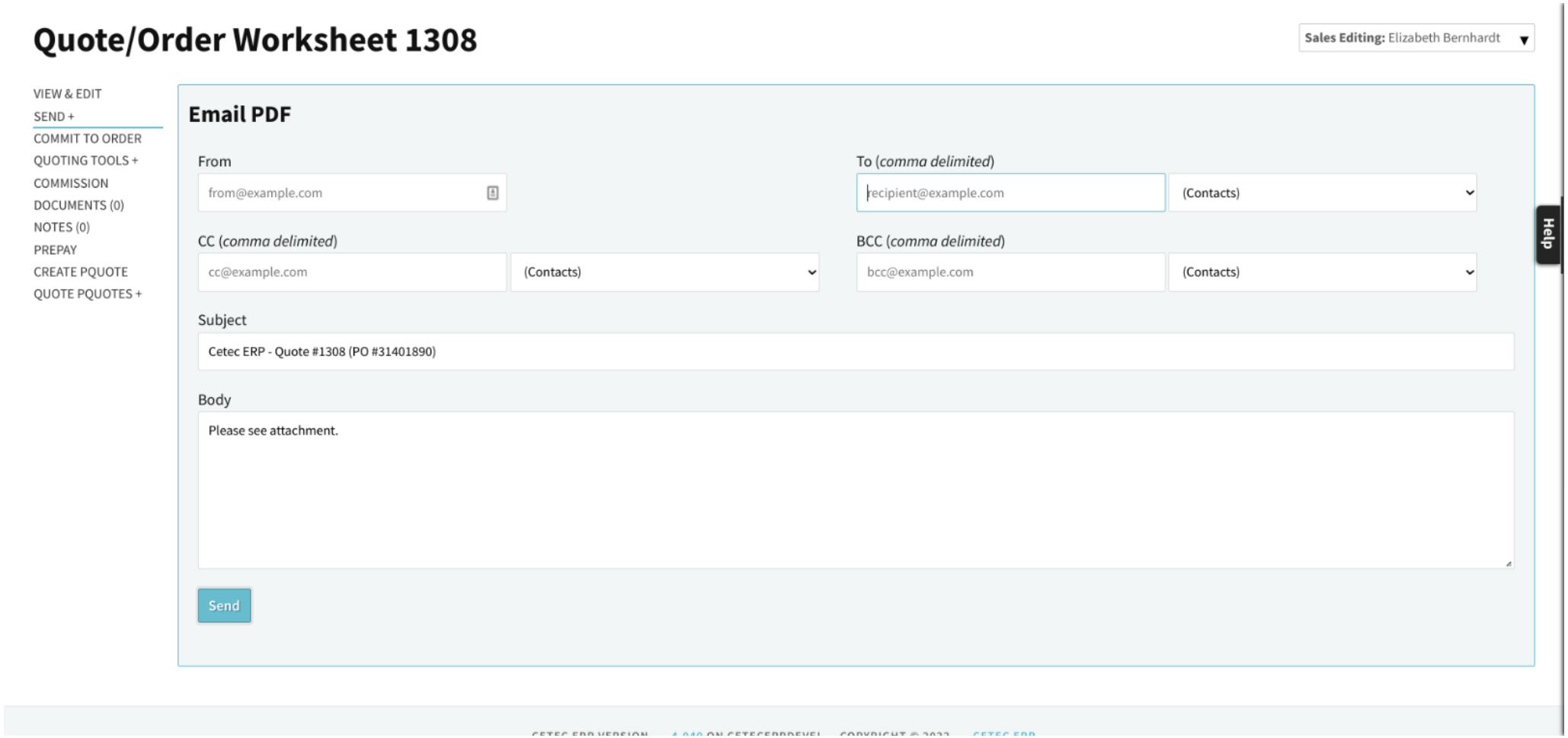
Here you can add the sender's email address.



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.


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

That's it. You're done.



Scan to go to the interactive player