Documents - Quote

<table>
<tr><td></td><td>For a description of the three left-hand panels and the response buttons, click here: Main Data - Quote.</td></tr>
<tr><td></td><td>In the Documents tab, you can review the documents to be used for the estimates and select the documents' recipients. Another feature of this tab is the option to send an individual quote for each selected language combination or task instead of the entire quote itself.</td></tr>
<tr><td>Receivables</td><td>This column lists the structure of the quote, including all of its language combinations and their respective tasks.

Select the tick boxes of the items for which you want to send a quote.

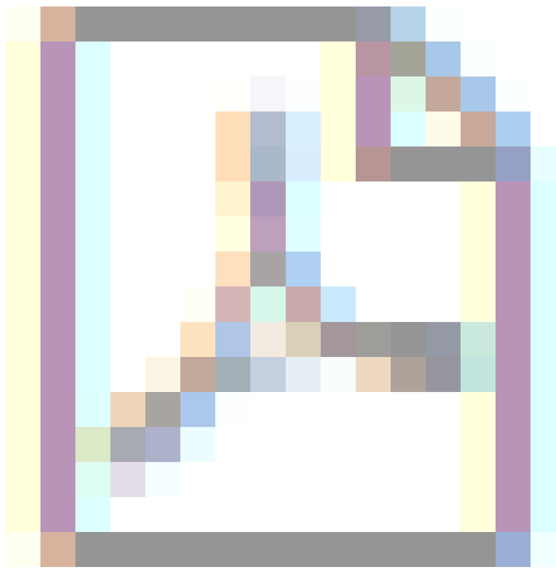
When you select the tick box of the overall quote, all of its items are automatically selected as well. Similarly, when you deselect the tick box of the overall quote, all of its items are deselected too.
When you select the tick box of a language combination, all of its tasks are selected automatically as well. Similarly, when you deselect the tick box of a language combination, all of its tasks are deselected too.</td></tr>
<tr><td>Document Status</td><td>The state of the receivable document. Here you can you see if the receivable document has been sent.

<table><tr><th colspan="2">The document statuses are:</th></tr><tr><td>Not Sent</td><td>The quote was not sent to the customer.</td></tr><tr><td>Sent</td><td>The quote was sent to the customer.</td></tr><tr><td>Sent But Modified</td><td>The quote was sent to the customer, but a receivable was modified afterwards. Therefore, the quote the customer has is likely outdated, and the new quote needs to be sent to the customer.</td></tr><tr><td>Partially Sent</td><td>Some but not all of the overall quote's or task's documents were sent.</td></tr></table></td></tr>
<tr><td>Edit and Send</td><td>Click

to edit and manually send the email which includes the quote for this task.

When you click on this, a new window appears. For a description of the window, click here: E-mail Test Window.</td></tr>
<tr><td>Send to</td><td>The recipients of the quote.

When you click Default, a new window appears. Inside the window you can find the destination of the document.</td></tr>
</table>

Document Template	The template to be used in the quote document. To select a different template, click on the template name currently listed in the cell. A new window appears. Click on the drop-down list and select the desired template. To create a new template, go to Configuration > Templates > Document Templates.
Preview & Print	A printable preview of the quote document. To see a preview of the document, click  .
Send Global Quote	Click to send the entire quote to the selected contact person. After the contact person receives the quote, he/she can review it an then decide to either accept or reject it.
Send Quotes for Selected Tasks	Click to send the quotes for each selected tasks to the selected contact person. Each quote appears in a separate email. A quote <u>cannot</u> be neither accepted nor rejected when a quote is created only for specific tasks and not the overall quote itself.
Send Quote for Review	
Reviewer	The user at your company who is to inspect the entire quote or the quotes of the selected tasks before the quote is sent to the customer. Click on the drop-down list and select a user.

Send Quote for Review	Click to send the entire quote to the reviewer for inspection. To edit and manually send the email which includes the quote, click  . When you click on this, a new window appears. For a description of the window, click here: E-mail Test Window.
Send Selected Tasks for Review	Click to send the quotes for the selected tasks to the reviewer for inspection. Each quote appears in a separate email.
Edit	Click to modify.
Save	Click to apply the modifications.
Cancel	Click to terminate the modifications process.