

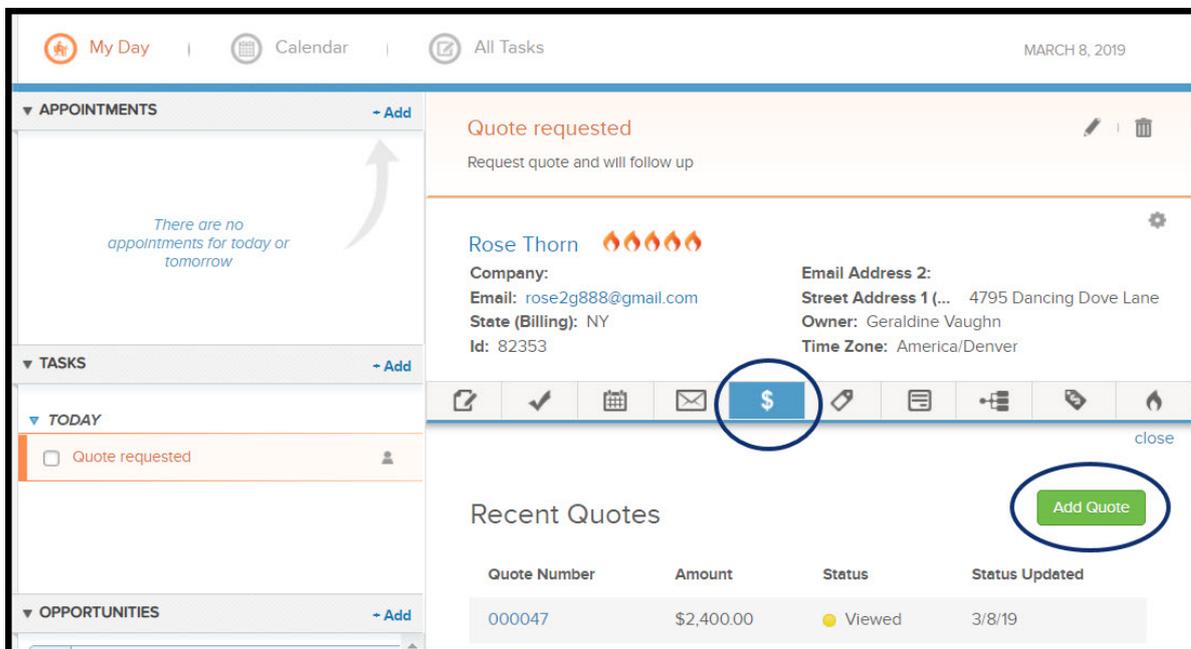
# Create a quote

The quoting tool makes it easy to create, manage and share quotes and proposals with potential buyers directly from a contact search. To take payments online, check out the [Keep Payments FAQ](#).

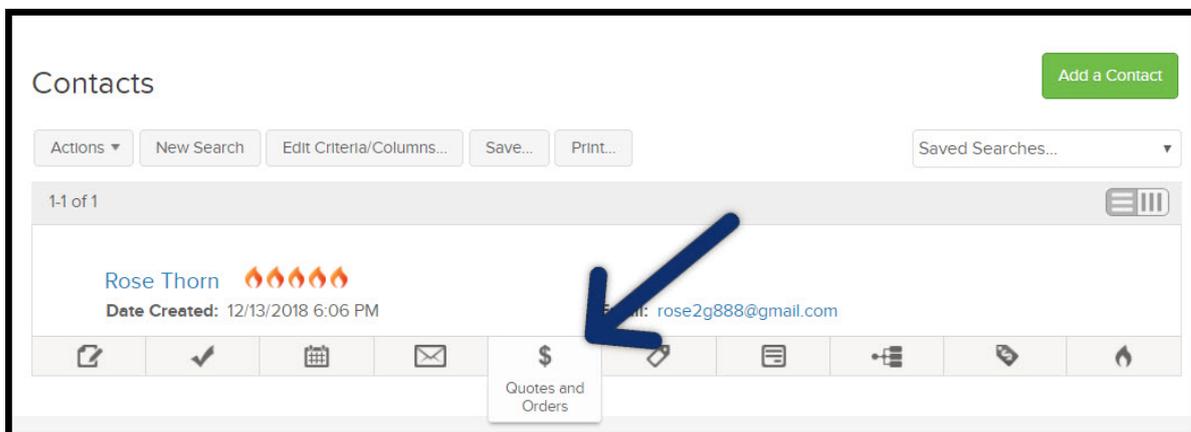
## Access quote tool

You can access quoting tools from:

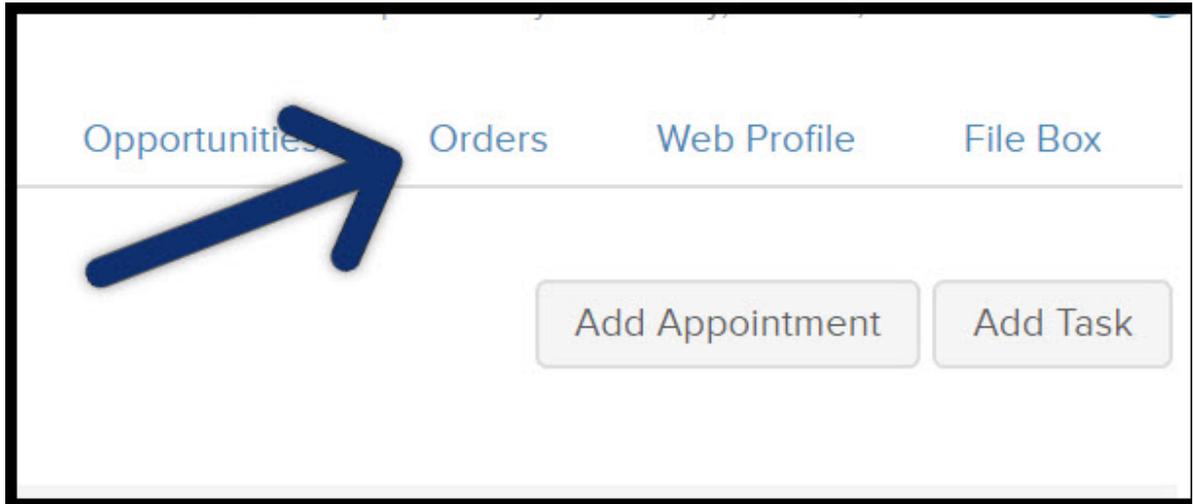
- My Day by clicking the \$ icon within the task tool bar



- The interactive List View by clicking the \$ icon within the task tool bar



- Through the contact's Order tab

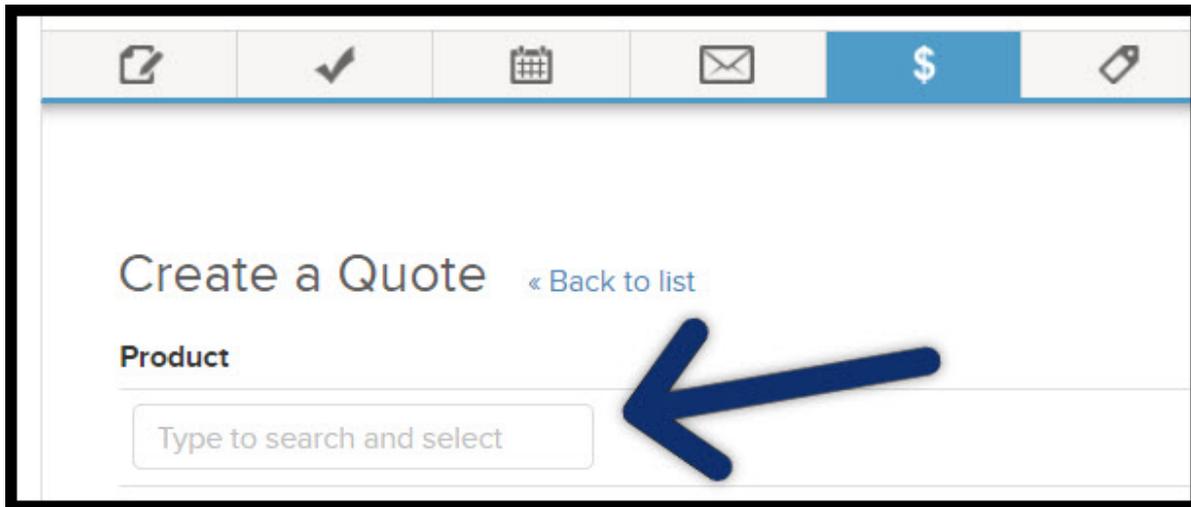


## Creating quotes

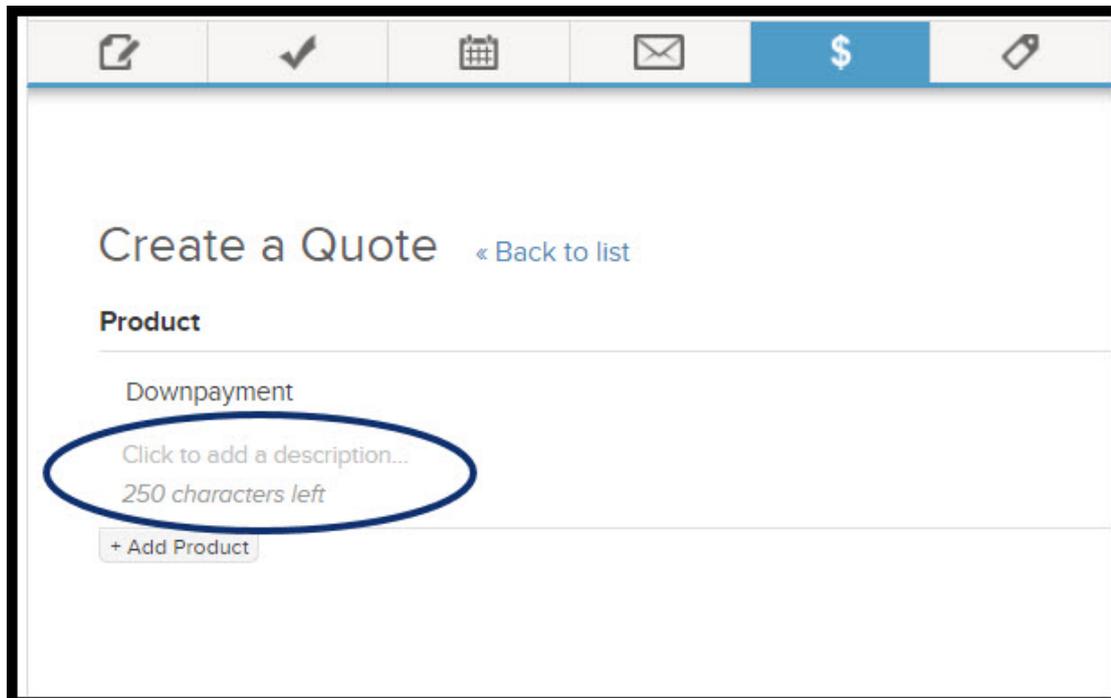
1. To create a new quote, click **add quote**



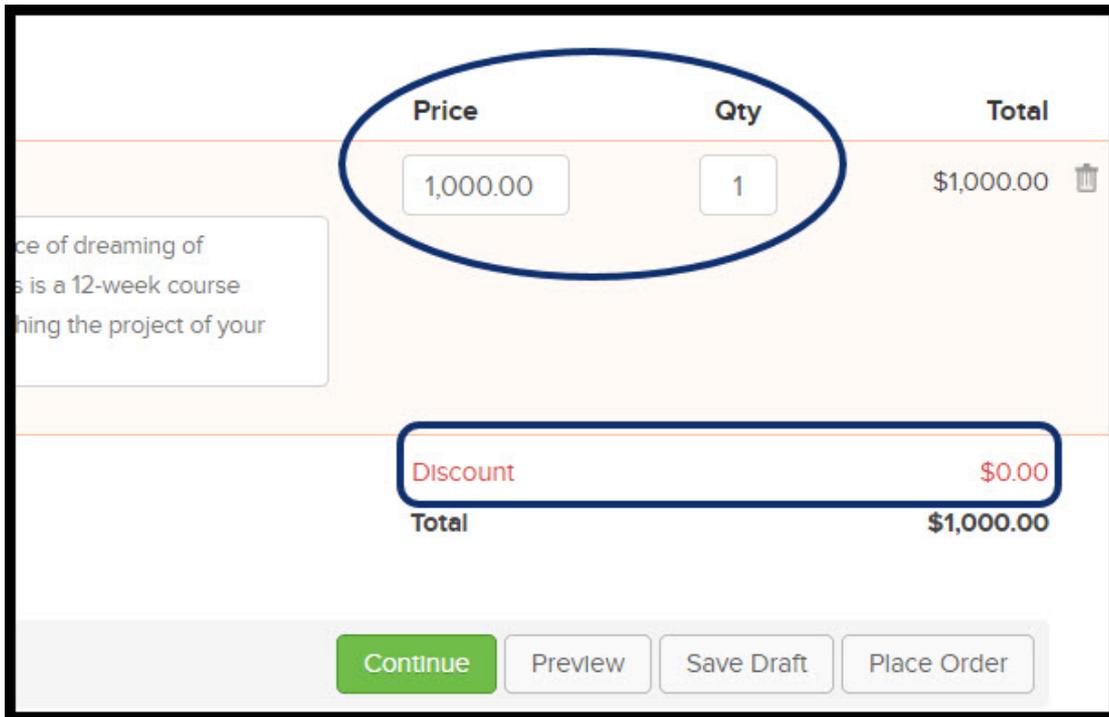
2. Use the auto-complete box to search for products and/or subscriptions to the quote



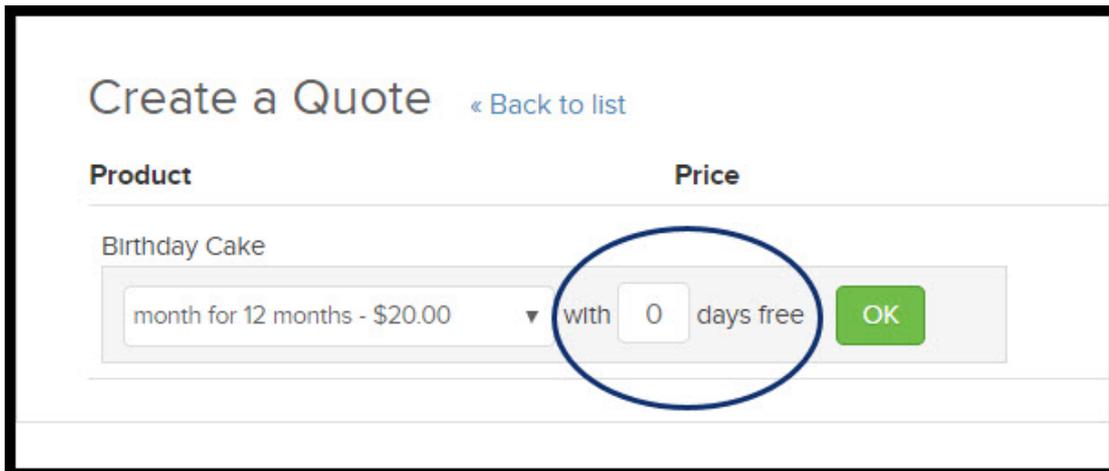
3. Once a product is selected, you can:
- Edit the description



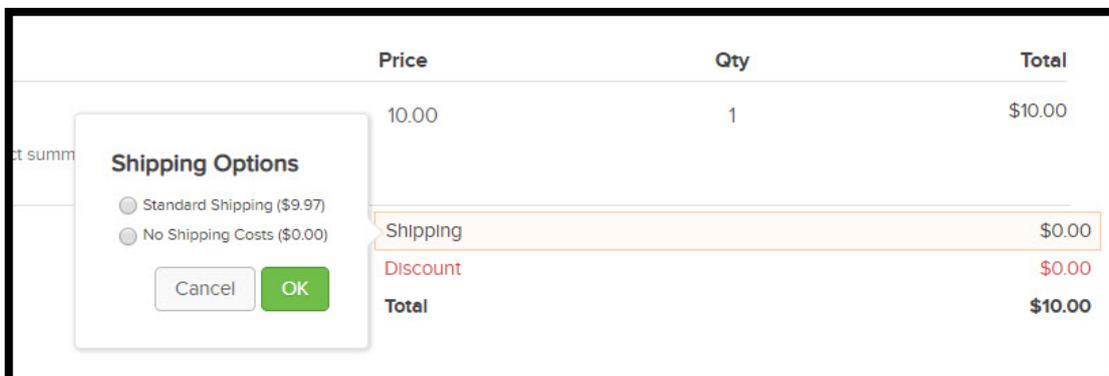
- Price, quantity, and discount- apply a percentage discount or flat rate price reduction (optional)



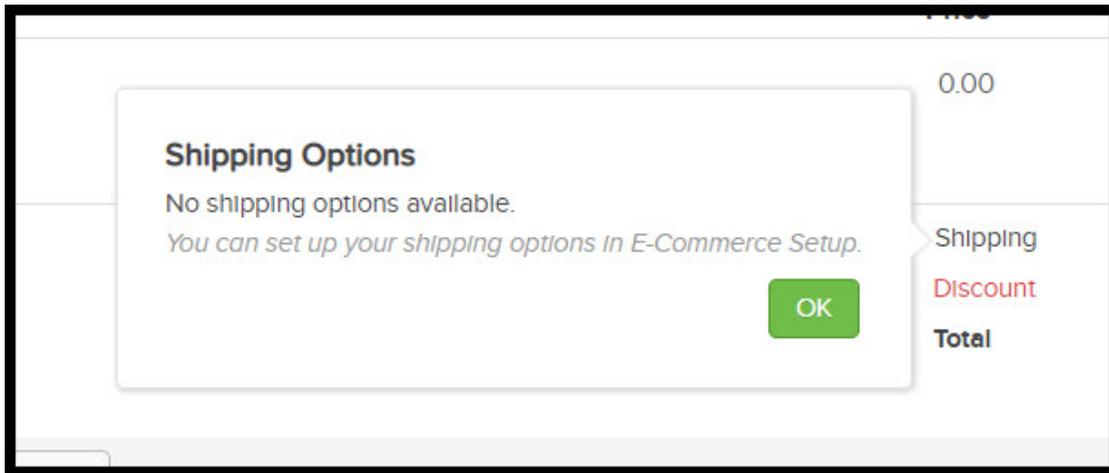
- Subscriptions can be edited to include a free trial period



- If a product qualifies for shipping, click the Shipping link to select a shipping option



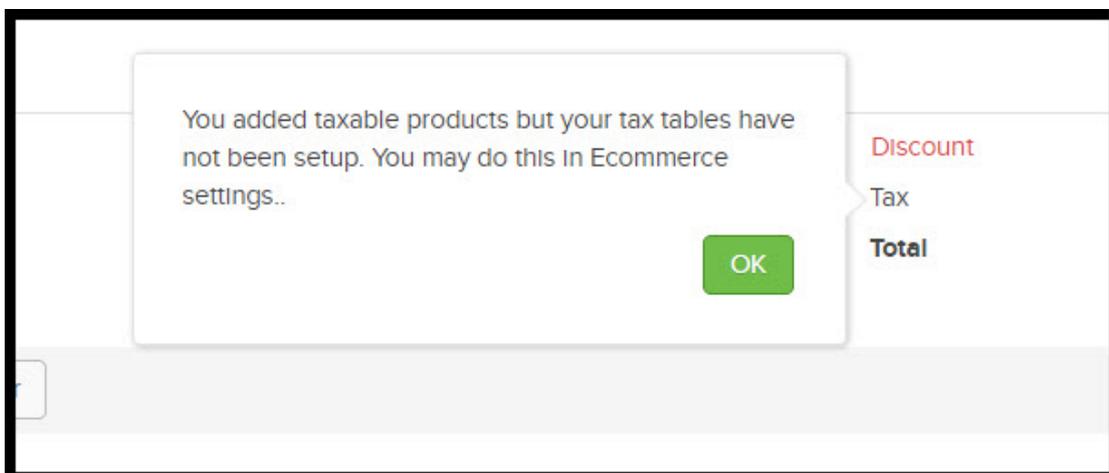
- If no shipping options exist, a pop-up will direct you to the e-commerce setup page



- When taxable products are added to a quote, tax will be automatically calculated and applied

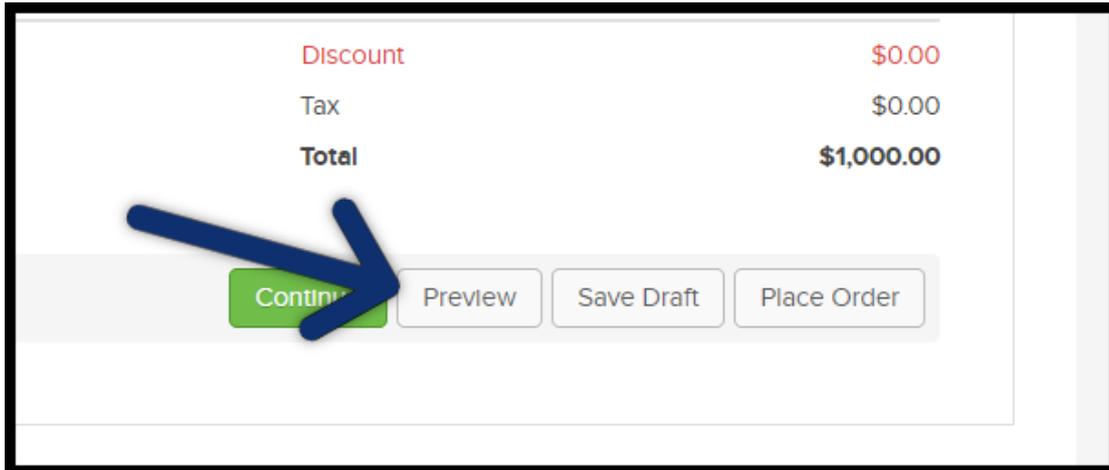
Discount	\$0.00
Tax	\$120.00
<b>Total</b>	<b>\$1,120.00</b>

- If no tax tables are configured, a pop-up will direct you to the E-commerce Setup page

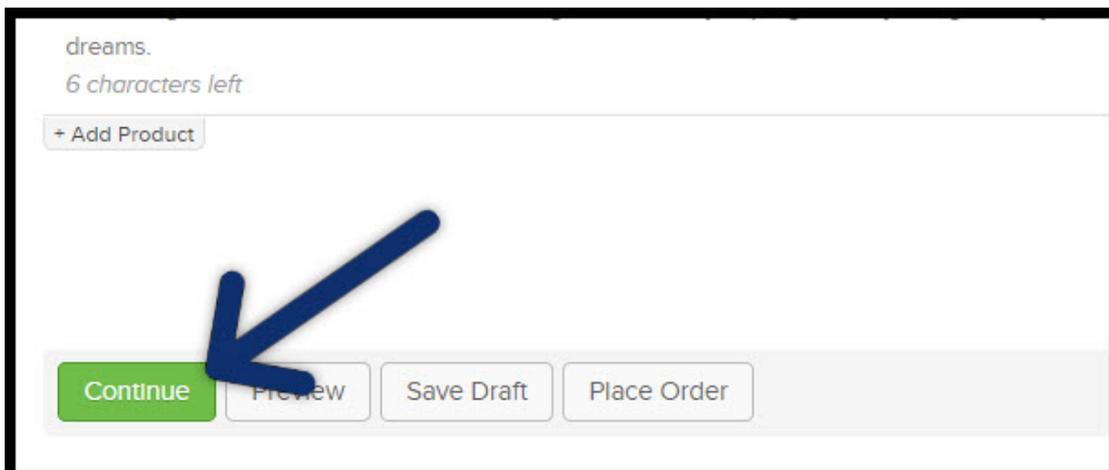


- By clicking "Preview" a new page will open with your quote preview

- by clicking **Preview** , a new page will open with your quote preview



- Clicking "Continue" will open an email dialog box with options to edit the recipient email address, subject line and email body.



## Send Quote

### Payment Options

- Send quote with no payment options
- Send quote and allow payment later
- Send quote and require online payment

### Send Options

From

To

Subject

You are receiving this email because a quote was requested from alwayshelpful.

[View My Quote](#)

Thank you for giving us the opportunity to serve you. If we can be of further assistance, please let us know.

[Send](#)

[Cancel](#)

- The quote Email can be sent to any email address
- Email body can be edited except for the quote button can not be edited
- There are no quote email templates. You can only edit the text in the body.

## Payment options

-

## Send Quote

**Payment Options** 

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**Send Options**

From

To

Subject

## Send quote with no payment options

1. Your customer can ONLY accept or decline the quote

TOTAL	\$1,000.00	
Hourly rate runs at \$120 hr. but with your 50% discount it's \$60. A detail history of hours will be kept.		
<input type="button" value="Print"/>	<input type="button" value="Decline"/>	<input type="button" value="Accept"/>

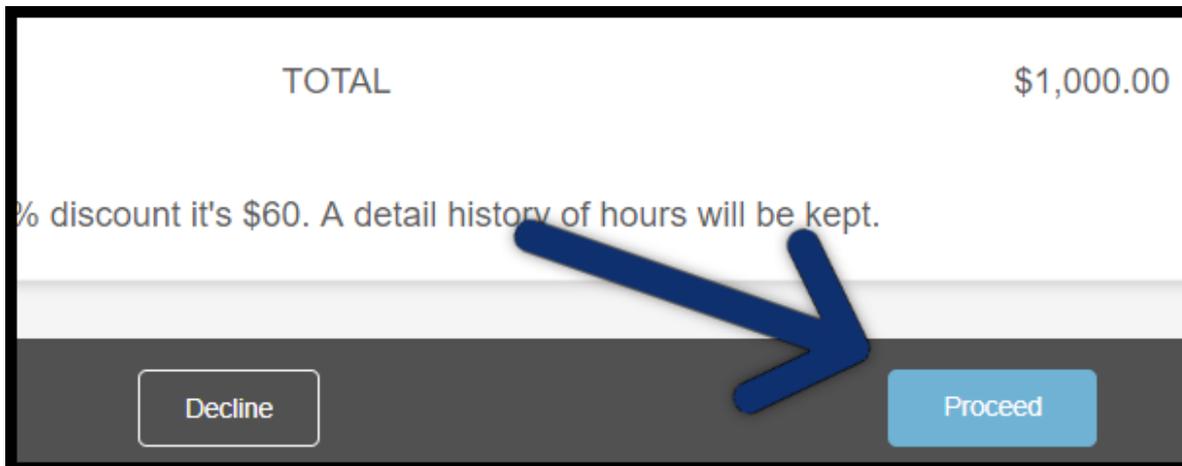
2. An order record will be created which you can manually apply payment or send an invoice with payment option

### Recent Orders

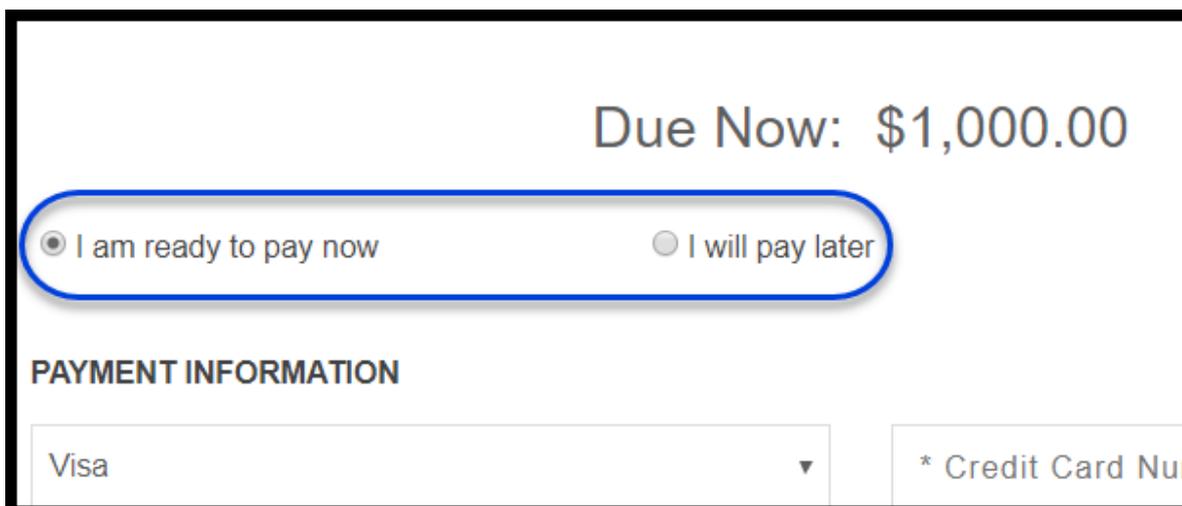
Date	Link	Payment Plan
3/8/19	<a href="#">Order From Quote 000049</a>	Has A Payment Plan

## Send quote and allow payment later

1. Your customer would click "Proceed"



2. Then select to either pay online immediately or can pay later



## Send quote and require online payment

1. Your customer would click "Proceed"

TOTAL \$1,000.00

% discount it's \$60. A detail history of hours will be kept.

Decline Proceed



2. Unlike the option to pay later, once "Proceed" is clicked your customer is directed to enter their payment information.

Due Now: \$1,000.00

PAYMENT INFORMATION

Visa \* Credit Card Number

EXPIRATION DATE

01 2019 CVC

**Important!** If you want to require the quote be paid online make sure you have a merchant account, check out [Keap Payments FAQ](#). Quotes DO NOT support PayPal.