

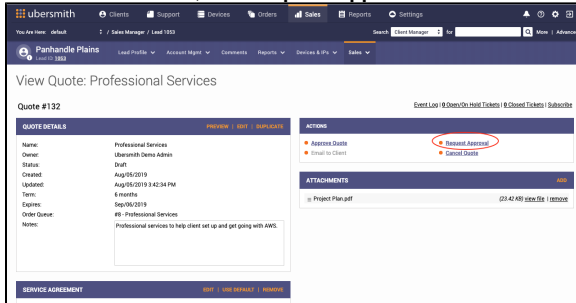
Processing Quotes

Ubersmith has a built-in quote workflow. Once you [create a quote](#), you will need to request a quote approval, approve the quote, and email the quote to the client for their signature in order to complete the full cycle and reach a signed service agreement. You can also cancel a quote. These actions require the appropriate level of Sales Manager permissions, to perform. See [Managing Users](#) for more information.

Requesting a Quote Approval

After you have completed a quote for a client, you will submit it for an internal approval. This action places the quote in the *Quote Approval Queue*, so it can be accessed by users authorized to approve quotes, see Approving a Quote below.

1. [Access the View Quote page.](#)
2. In the *Actions* section, click **Request Approval**.



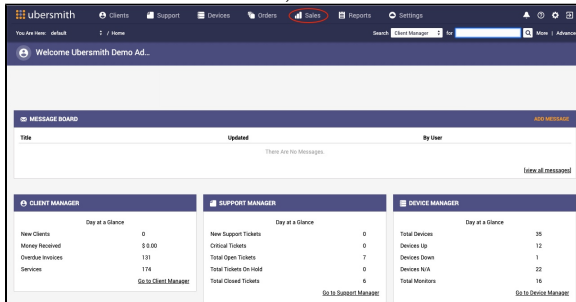
A confirmation message appears.

3. Click **Yes**.

Approving a Quote

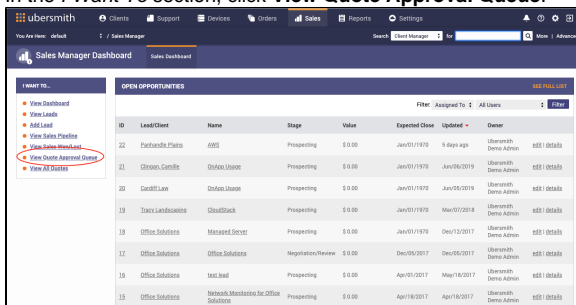
The Quote Approval Queue lists all the quotes you need to approve in one place, which then you can access each quote to review and approve. This enables the **Email to Client** link in the *View Quote* page.

1. From the *Ubersmith Dashboard*, click **Sales**.



The *Sales Dashboard* appears.

2. In the */ Want To* section, click **View Quote Approval Queue**.



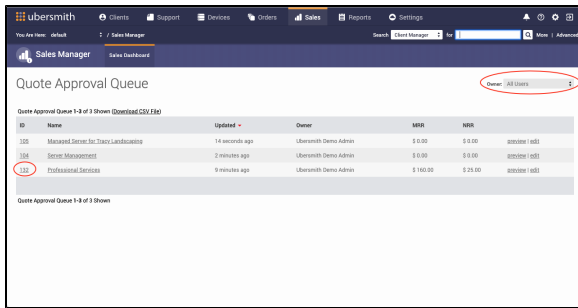
The *Quote Approval Queue* page appears.

3. Click the quote you want to review and approve. You can filter quotes by either all users or an individual user.

On this page:

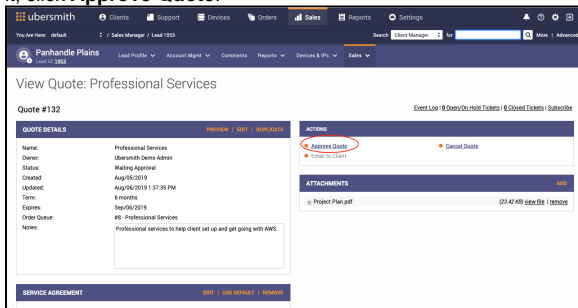
On this page:

- [Requesting a Quote Approval](#)
- [Approving a Quote](#)
- [Emailing a Quote to a Client](#)
- [Adding a Signed Contract](#)
- [Changing a Quote Status](#)
- [Cancelling a Quote](#)
- [Related Topics](#)



The **View Quote** page appears.

- Review the quote, and if you are ready to approve it, meaning it is ready for the client to receive it, click **Approve Quote**.



A confirmation message appears.

- Click **Yes**.

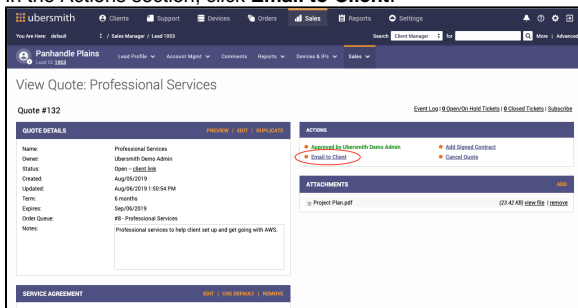
Emailing a Quote to a Client

Once an open quote is internally approved, it is ready to be emailed to the client for their approval and agreement by electronic signature.

The email is pre-populated based on the [Quote Generated Email template](#). By default it contains standard text and includes a unique URL link to the quote, including the service agreement and any other attachments. You can also access the quote from the *Quote Details* section by clicking the link in the **Status** field.

This web address can be accessed from outside of Ubersmith, so leads do not need an account to sign. If you need to handle the client approval by paper form, it can also be downloaded as a .pdf file suitable for printing. See Adding a Signed Contract (below).

- [Access the View Quote page](#).
- In the Actions section, click **Email to Client**.



The **Email Quote** page appears with a link to the electronic quote and signature page.

- Ensure the outgoing message to the client is appropriate.
- Select **Attach PDF** if one is necessary. This attaches any PDF files attached in the quote.

5. Click **Send Now**.



Once the client receives the email, accesses the online quote and is ready to sign, they need to perform the following:

1. Complete the *Contact Information* section, as necessary.

2. Select a preferred payment method. **New Credit Card** and **New ACH Account** will display additional fields to complete.

3. Enter their full name in the **Signature** field and click **Sign Contract** to digitally sign the contract.

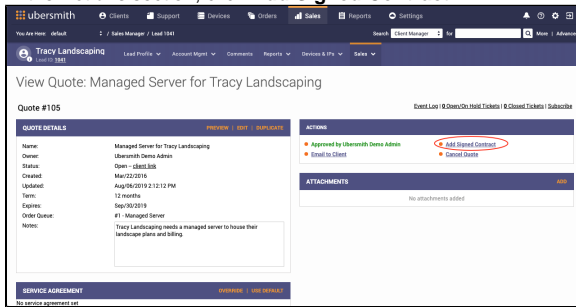
Once the client completes the requirements to digitally sign the quote, a copy of the completed and signed contract is emailed to them and the quote is sent to the designated *Order Manager queue* to be **processed as a new order**. An email is also sent to the quote owner, notifying them that the quoting process has been completed by the client.

Adding a Signed Contract

If you need to handle the quote approval process with the client as hard copies, you can attach a copy of the signed contract, once you have scanned it to your computer.

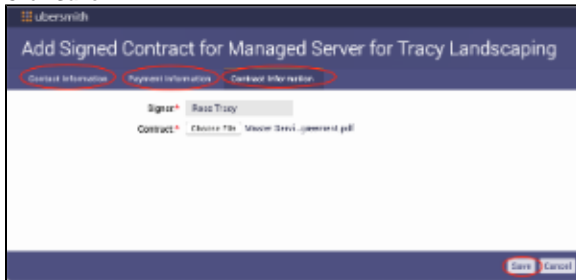
1. Access the [View Quote page](#).

2. In the **Actions** section, click **Add Signed Contract**.



The **Add Signed Contract** page appears with the **Contract Information** tab active.

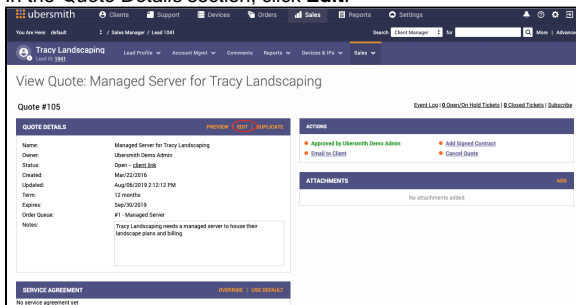
3. In the **Signer** field, enter the name of the client who signed the hard copy contract.
4. In the **Contract** field, click **Choose File**, navigate to the location of the scanned file and click **Open**.
5. Ensure the **Contract Information** and **Payment Information** tabs have been appropriately completed. See [Adding Quotes](#) for more information.
6. Click **Save**.



Changing a Quote Status

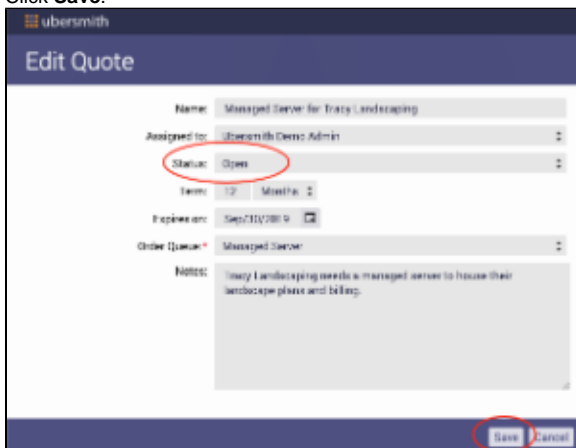
If needed, you can change the status of a quote, for example from Approved to Draft.

1. Access the [View Quote](#) page.
2. In the **Quote Details** section, click **Edit**.



The **Edit Quote** page appears.

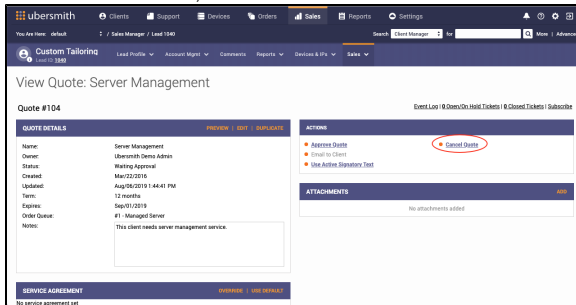
3. In the **Status** field, select the appropriate status.
4. Click **Save**.



Cancelling a Quote

You can cancel a quote before it is approved by a client.

1. Access the [View Quote](#) page.
2. In the **Actions** section, click **Cancel Quote**.



A confirmation message appears.

3. Click **Yes**.

Related Topics

[Adding Quotes](#)

[Managing Quotes](#)

[Using the Order Manager](#)