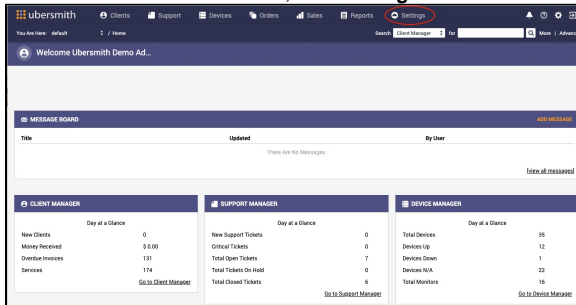


Configuring Quotes and Contracts

The Quotes & Contracts page lists the available configuration settings for the Sales Manager's quotes and contracts.

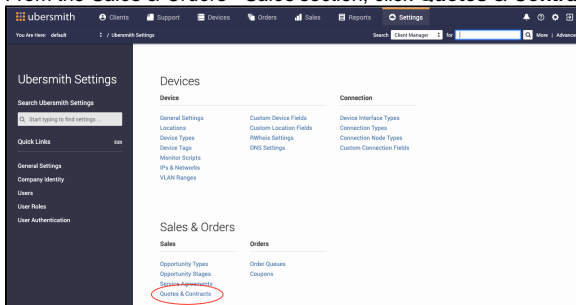
Access the Quotes & Contracts page

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



The *Ubersmith Settings* page appears.

2. From the *Sales & Orders - Sales* section, click **Quotes & Contracts**.



The *Quotes & Contracts* page appears.

On this page:

On this page:

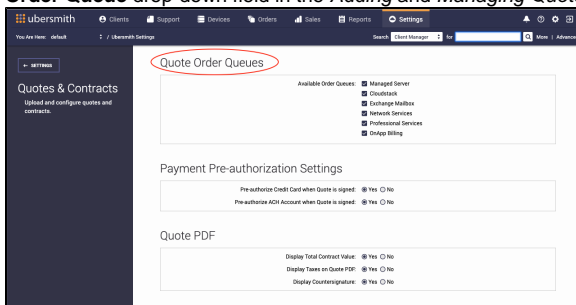
- [Access the Quotes & Contracts page](#)
- [Complete the Quote Order Queues Section](#)
- [Complete the Payment Pre-Authorization Settings Section](#)
- [Complete the Quote PDF Section](#)
- [Complete the Quote Payment Options Section](#)
- [Complete the Quote Generated Email Section](#)
- [Complete the Contract Approved Email Section](#)
- [Complete the Owner Approved Email Section](#)
- [Complete the Signatory Page Section](#)
- [Save Your Configuration Settings](#)
- [Related Topics](#)

Complete the Quote Order Queues Section

Note

The options shown here are determined on the *Order Queues* page. See [Order Queues](#) for more information.

1. In the **Available Order Queues** field, select the appropriate order queues to populate the **Type** drop-down field in the **Adding Opportunity Types** and **Managing Opportunity Types** and the **Order Queue** drop-down field in the *Adding* and *Managing Quote* pages.



Complete the Payment Pre-Authorization Settings Section

1. In the **Pre-authorize Credit Card when Quote is signed** field, select select **Yes** to hold the payment balance as unavailable until the transaction is cleared.

2. In the **Pre-authorize ACH Account when Quote is signed** field, select **Yes** to hold the payment balance as unavailable on a ACH account until the transaction is cleared.

Quote Order Queues

Available Order Queues: Managed Server, Checkback, Exchange/Mailbox, Network Services, Professional Services, Storage Billing

Payment Pre-authorization Settings

Pre-authorize Credit Card when Quote is signed: ☒ Yes ☐ No

Pre-authorize ACH Account when Quote is signed: ☒ Yes ☐ No

Quote PDF

Display Total Contract Value: ☐ Yes ☒ No

Display Taxes on Quote PDF: ☐ Yes ☒ No

Display Countersignature: ☐ Yes ☒ No

Complete the Quote PDF Section

- In the **Display Total Contract Value** field, select **Yes** to include the total value of the contract.
- In the **Display Taxes on Quote PDF** field, select **Yes** to include the value of taxes in the quote.
- In the **Display Countersignature** field, select **Yes** to display a countersignature fields on the signatory page of the quote.

Quote PDF

Display Total Contract Value: ☒ Yes ☐ No

Display Taxes on Quote PDF: ☒ Yes ☐ No

Display Countersignature: ☒ Yes ☐ No

Quote Payment Options

Credit cards, Check/Wire, Payroll, ACH Account

Quote Generated Email

English(USA), Français canadien, Portuguese (Portugal)

From Name: Marshall Holding

From Email: [redacted]

Subject: Quote #123456789 is Ready for Approval

Body: Dear client, your quote...

Complete the Quote Payment Options Section

- Select one or more appropriate quote payment methods. These payment options will be available for the quoted services when paying through the *Client Portal*.

Quote PDF

Display Total Contract Value: ☐ Yes ☒ No

Display Taxes on Quote PDF: ☐ Yes ☒ No

Display Countersignature: ☐ Yes ☒ No

Quote Payment Options

☒ Credit cards

☒ Check/Wire

☒ Payroll

☒ ACH Account

Quote Generated Email

English(USA), Français canadien, Portuguese (Portugal)

From Name: Marshall Holding

From Email: [redacted]

Subject: Quote #123456789 is Ready for Approval

Body: Dear client, your quote...

Complete the Quote Generated Email Section

You can send clients a customized email that a quote has been sent to them for approval. Example text is pre-populated.

1. In the **From Name** field, enter the name the quote is coming from.
2. In the **From Email** field, enter the email address the quote is coming from.
3. In the **Subject** field, enter the subject of the email.
4. In the **Body** field, enter the body of your quote notification message.
5. Click the **View Variables** link to display the *View Variables: Quote Generated* page which lists all the system variables you can use to customize your email.

Quote Generated Email

English(USA) Français canadien Português (Portugal)

From Name: Marshall Hoising

From Email: [redacted]

Subject: Quote #Quote_Lc8f8 is Ready for Approval

Body: Dear #first_name,

Your quote is complete and ready to be approved online. Your quote code is: #Quote_Lc8f8

Please click here to review and approve this quote: #Quote_Lc8f8

Regards,

Marshall Hoising

[View Variables](#)

Complete the Contract Approved Email Section

You can send clients a customized email confirming that you have received their completed and approved contract, and a copy is attached for their records. Example text is pre-populated.

1. In the **From Name** field, enter the name the confirmation is coming from.
2. In the **From Email** field, enter the email address the confirmation is coming from.
3. In the **Subject** field, enter the subject of the email.
4. In the **Body** field, enter the body of your quote notification message.
5. Click the **View Variables** link to display the *View Variables: Contract Approved* page which lists all the system variables you can use to customize your email.

Contract Approved Email

English(USA) Français canadien Português (Portugal)

From Name: Marshall Hoising

From Email: [redacted]

Subject: Contract #Contract_Lc8f8 between #Company# and Ubersmith D

Body: Dear #first_name,

We have received your approval of contract #Contract_Lc8f8 and have attached a copy to pdf format for your records.

You can also access the contract online at: #Contract_Lc8f8

Regards,

Marshall Hoising

[View Variables](#)

Complete the Owner Approved Email Section

You can send a user a customized email confirming that you received an approved contract from a client. Example text is pre-populated.

1. In the **From Name** field, enter the name the confirmation is coming from.
2. In the **From Email** field, enter the email address the confirmation is coming from.
3. In the **Subject** field, enter the subject of the email.
4. In the **Body** field, enter the body of your quote notification message.
5. Click the **View Variables** link to display the *View Variables: Owner Approved* page which lists all the system variables you can use to customize your email.

Owner Approved Email

English(USA) Français canadien Português (Portugal)

From Name: Marshall Hoising

From Email: [redacted]

Subject: Contract #Contract_Lc8f8 between #Company# and Marshall's H

Body: Dear #owner_name,

#Company# has signed contract #Contract_Lc8f8

You can access the contract online at: #Contract_Lc8f8

Regards,

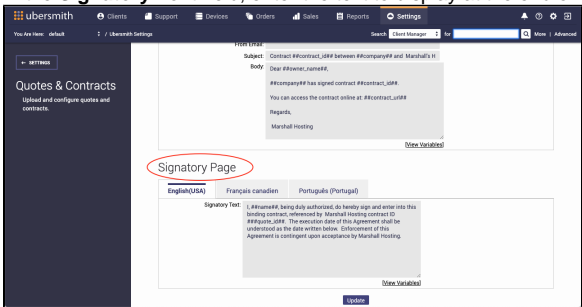
Marshall Hoising

[View Variables](#)

Complete the Signatory Page Section

You can customize the signatory page of the quote. Example text is pre-populated.

- In the **Signatory Text** field, enter the text to display at the end of the quote.



Save Your Configuration Settings

- Click **Update** to save your configuration settings.



Related Topics

[Sales & Orders Settings](#)