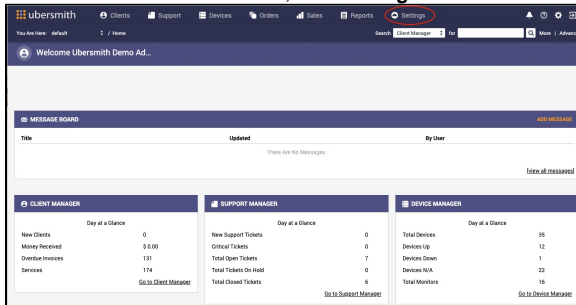


Configuring Quotes and Contracts

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

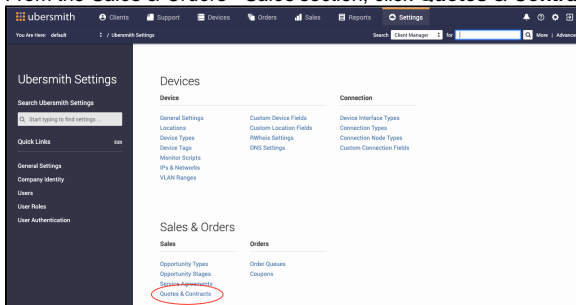
Access the Quotes & Contracts page

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:

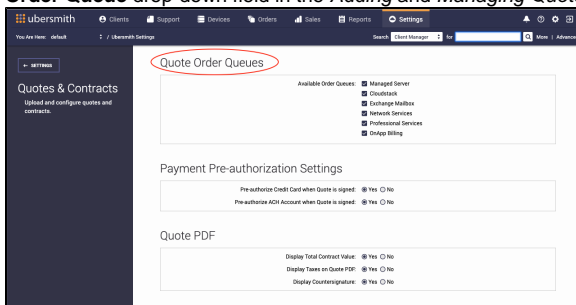
- [Access the Quotes & Contracts page](#)
- [Complete the Quote Order Queues Section](#)
- [Complete the Payment Pre-Authorization Settings Section](#)
- [Complete the Quote PDF Section](#)
- [Complete the Quote Payment Options Section](#)
- [Complete the Quote Generated Email Section](#)
- [Complete 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/Market, 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 Hesting

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 Hesting

[View Variables](#)

Contract Approved Email

English(USA) Français canadien Português (Portugal)

From Name: Marshall Hesting

From Email: [redacted]

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

Body: Dear #first_name,

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 Hesting

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 all forms for your records.

You can also access the contract online at: #Contract_Lc8f8

Regards,

Marshall Hesting

[View Variables](#)

Owner Approved Email

English(USA) Français canadien Português (Portugal)

From Name: Marshall Hesting

From Email: [redacted]

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

Body: Dear #first_name,

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 Hesting

From Email: [redacted]

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

Body: Dear #first_name,

#Company# has signed contract #Contract_Lc8f8

You can access the contract online at: #Contract_Lc8f8

Regards,

Marshall Hesting

[View Variables](#)

Signatory Page

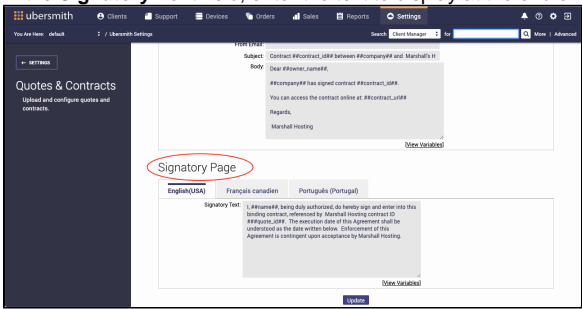
English(USA) Français canadien Português (Portugal)

Signatory Text: I, #first_name, being duly authorized, do hereby sign and enter into this binding contract, witnessed by Marshall Hesting contract ID: #Quote_Lc8f8. The execution date of this Agreement shall be indicated on the date written below. Enforcement of this Agreement is contingent upon acceptance by Marshall Hesting.

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](#)