

How to send Quotes

The Send Quotes button is used to send to the primary contact of customer a copy of the Transport Quotes. Note that for this feature to work, make sure that the **Company Preferences > SMTP Email Settings** is properly configured (refer to [How to Set Up SMTP Email Settings](#)).

Customer Contact setup :

Enter Customer's Email address and select Email Distribution as 'Transport Quote'

Entity Contact - Bob Smith

New Save Delete Undo Close

Detail CRM Information Audit Log (4) Additional Information

Full Name: Bob Smith Suffix: Add Photo

Title: Nickname: Add Photo

Email (username): rizza.castillo@irely.com

Phone: Mobile: Add Photo

Location Name: Chicago

Address: 1739 Belmont

City: Chicago State: IL

Zip/Postal: 60606 Country: United States

Time Zone: (UTC-08:00) Pacific Time (US & Canada)

Contact Method: Dept: Type: Add Photo

Email Distribution: Transport Quote

Notes:

Active: ☒ Rank: 1

User Portal Settings

Change Password Email Login

Portal Access: ☐ User Role

Username: rizza.castillo@irely.com

Portal URL: 192.168.0.30/21.17.1/21/

Contact Information

+ Insert - Remove Types

Type: Details:

Sending Quotes :

You can send confirmed quotes to customer . After sending this confirmed quotes to customer , Quote status will change to Sent.

Send Quote button will be enable only for the confirmed quotes.(and for sent quotes for re sending purpose)

Transport Quotes - TRQ-56

New Save Refresh Delete Undo Confirm Void Send Quotes Print Quote Close

Details Audit Log (0)

Quote Info

Status: Confirmed

Quote No: TRQ-56

Quote Date: 6/13/2017 07:06 PM

Effective Date: 6/13/2017 07:06 PM

Customer Info

Customer: ABC Trucking

Address: 1739 Belmont

Ship To	Item	Fuel Supl	Supply P	Rack Pric	Deviation	Temp/Ac	Freight	Price	Tax Grou	Tax Amo	Price wit	Margin	Order Qt	Ext Profit
Chicago	TR It...	Marat...	Muncie	1.2500...	1.0000...	0.0000...	0.0000...	2.2500...	Tax Gr...	0.2300...	2.4800...	1.0000...	1	1.0000...
Chicago	TR It...	Marat...	Muncie	1.3500...	2.0000...	0.0000...	0.0000...	3.3500...	Tax Gr...	0.3400...	3.6900...	2.0000...	1	2.0000...
				0.0000...	0.0000...	0.0000...	0.0000...	0.0000...		0.0000...	0.0000...	0.0000...	0	0.0000...

Click on Send Quotes button

Once the quote is sent, it will display successful message



iRely i21

Email successfully sent.

OK

Then quote status will change to sent. If you want you can resend the quote again

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Enter Customer's Email address and select Email Distribution as 'Transport Quote'

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Transport Quotes - TRQ-126

New Save Refresh Delete Undo Confirm Void **Send Quotes** Print Quote Close

Details Audit Log (1)

Quote Info

Status: Confirmed

Quote No: TRQ-126

Quote Date: 06/22/2016 01:33 PM

Effective Date: 06/22/2016 01:33 PM

Customer Info

Customer: Apple Spice Sales

Address: 1909 Carrow Street

Salesperson:

Phone: 2609698450

A/R Info

Balance: 421,017.20

Balance with Discount: 421,017.20

Credit Limit: 0.00

Quote Comments:

Customer Comments:

Ship To	Item	Fuel Suppl	Supply Pos	Rack Price	Deviation	Temp Adj	Freight	Price	Price with	Margin	Order Qty	Ext Profit
Apple L...	LPG	Kaliba C...	KC War...	5.500000	5.000000	0.000000	0.000000	10.5000...	0.000000	5.000000	1	
Apple L...	LPG	Kaliba C...	KC Stee...	5.500000	5.000000	0.000000	0.000000	10.5000...	0.000000	5.000000	1	
				0.000000	0.000000	0.000000	0.000000	0.000000	0.000000	0.000000	0	

Ready

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iRely i21

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