

# 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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### Customer Contact setup :

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

### 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-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
<input type="checkbox"/> Apple L...	LPG	Kaliba C...	KC War...	5.500000	5.000000	0.000000	0.000000	10.5000...	0.000000	5.000000	1	
<input type="checkbox"/> 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

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