

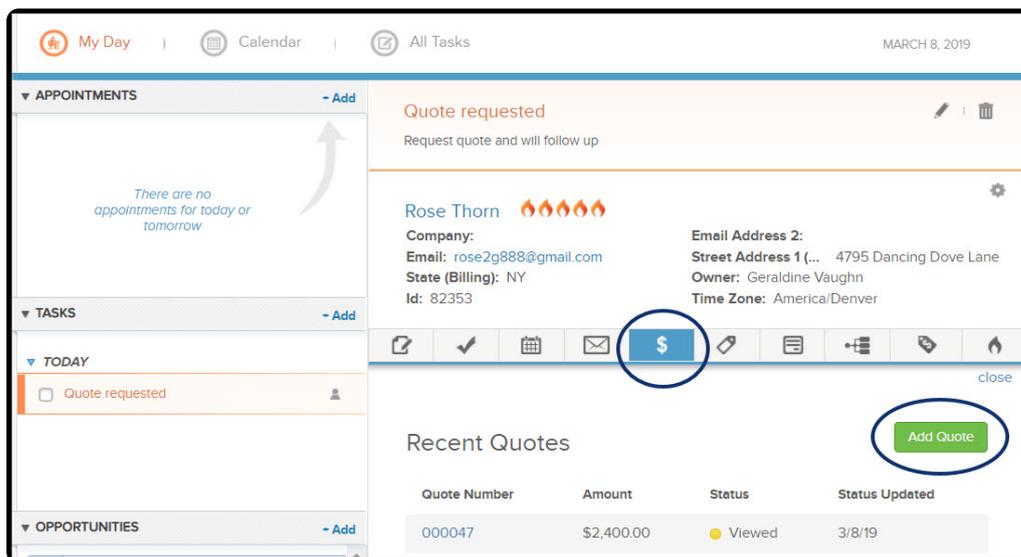
Create a quote

The quoting tool makes it easy to create, manage and share quotes and proposals with potential buyers directly from a contact search. To take payments online, check out the [Keap Payments FAQ](#) .

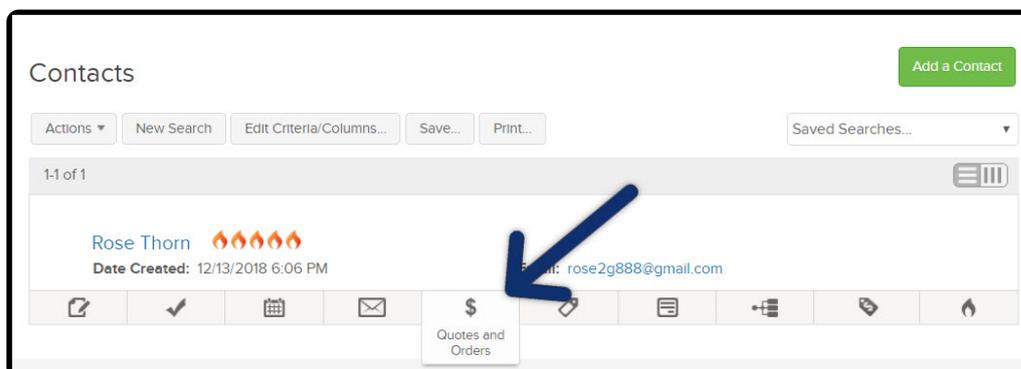
Access quote tool

You can access quoting tools from:

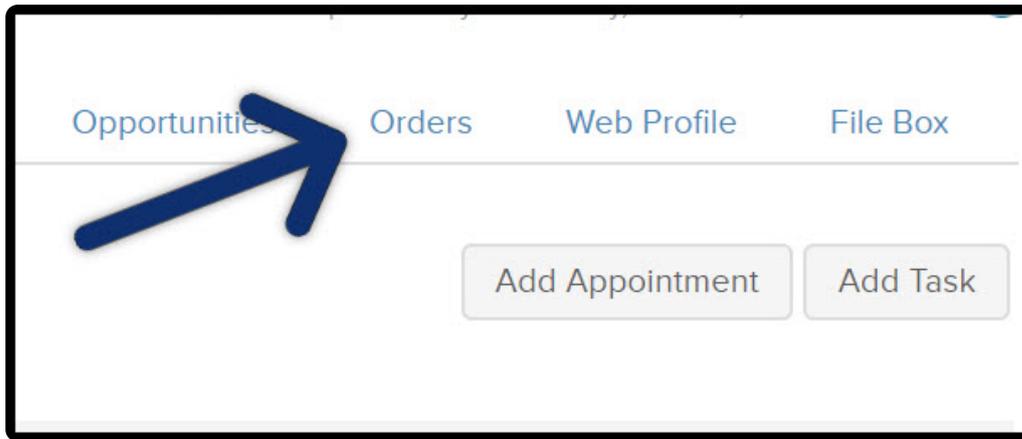
- My Day by clicking the \$ icon within the task tool bar



- The interactive List View by clicking the \$ icon within the task tool bar

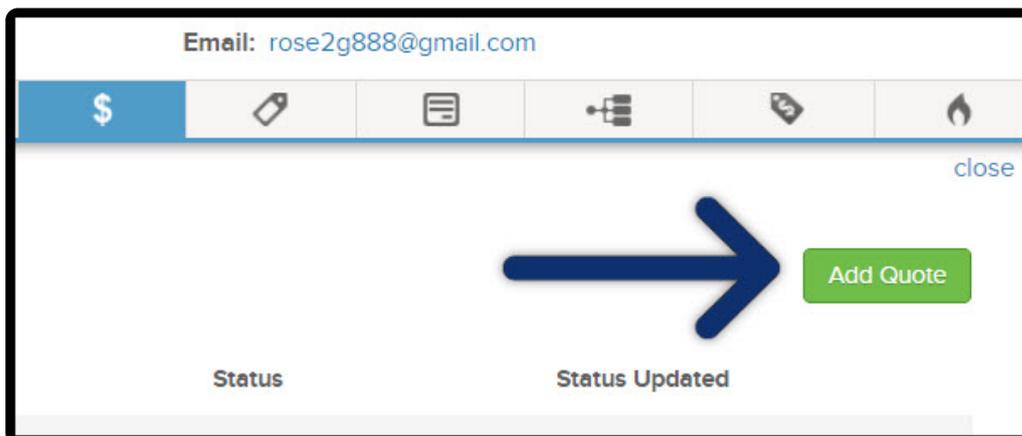


- Through the contact's Order tab

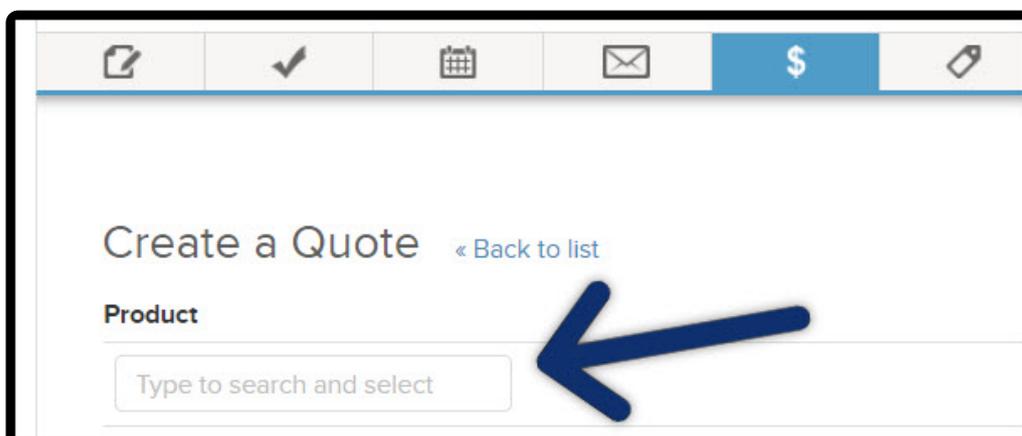


Creating quotes

1. To create a new quote, click **add quote**



2. Use the auto-complete box to search for products and/or subscriptions to the quote



3. Once a product is selected, you can:

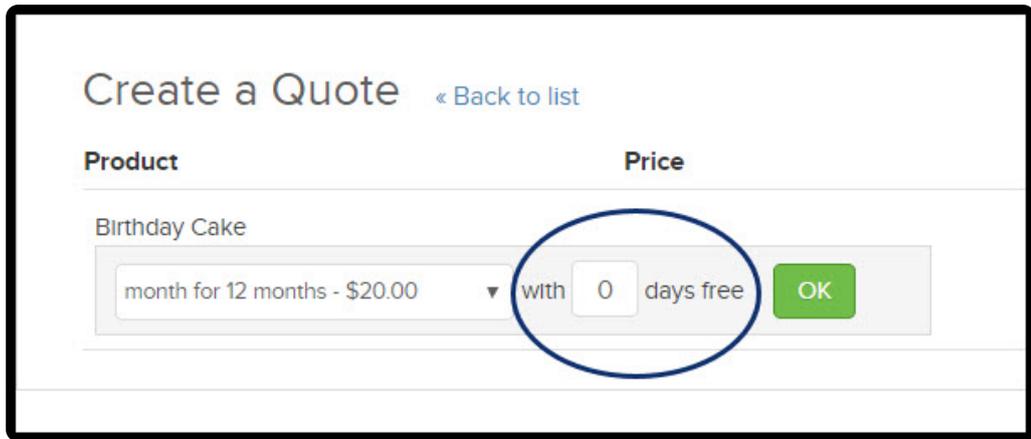
- Edit the description

The screenshot shows a mobile application interface for creating a quote. At the top, there is a navigation bar with icons for edit, check, calendar, email, currency (\$), and delete. Below the navigation bar, the title 'Create a Quote' is displayed with a 'Back to list' link. Under the 'Product' section, there is a 'Downpayment' label and a text input field. The text input field contains the placeholder text 'Click to add a description...' and '250 characters left'. A blue oval highlights this text input field. Below the text input field is a '+ Add Product' button.

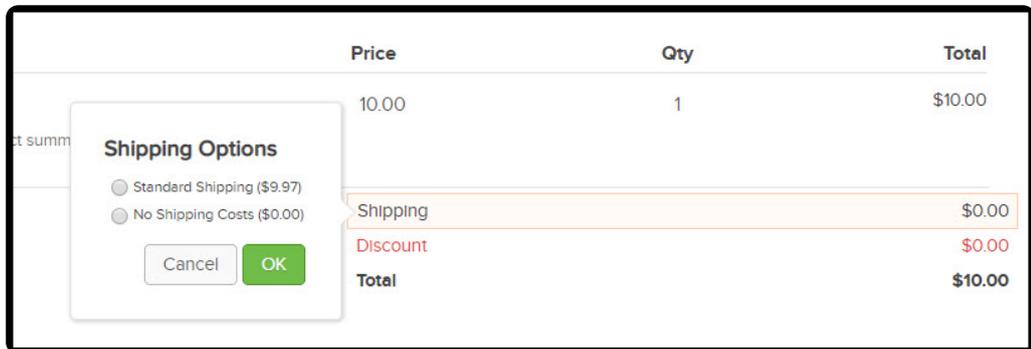
- Price, quantity, and discount- apply a percentage discount or flat rate price reduction (optional)

The screenshot shows a summary table for a quote. The table has three columns: 'Price', 'Qty', and 'Total'. The 'Price' column contains the value '1,000.00', the 'Qty' column contains '1', and the 'Total' column contains '\$1,000.00'. A blue oval highlights the 'Price' and 'Qty' columns. Below the table, there is a 'Discount' field with a value of '\$0.00' and a 'Total' field with a value of '\$1,000.00'. A blue oval highlights the 'Discount' and 'Total' fields. At the bottom of the screen, there are four buttons: 'Continue' (green), 'Preview', 'Save Draft', and 'Place Order'.

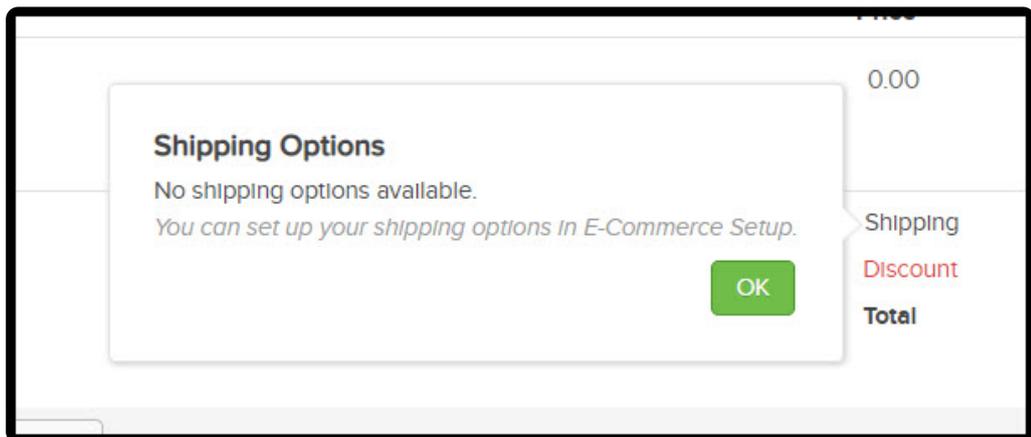
- Subscriptions can be edited to include a free trial period



- If a product qualifies for shipping, click the Shipping link to select a shipping option



- If no shipping options exist, a pop-up will direct you to the e-commerce setup page



- When taxable products are added to a quote, tax will be automatically calculated and applied

Discount	\$0.00
Tax	\$120.00
Total	\$1,120.00

- If no tax tables are configured, a pop-up will direct you to the E-commerce Setup page

You added taxable products but your tax tables have not been setup. You may do this in Ecommerce settings..

Discount	
Tax	
Total	

- By clicking "Preview", a new page will open with your quote preview

Discount	\$0.00
Tax	\$0.00
Total	\$1,000.00

- Clicking "Continue" will open an email dialog box with options to edit the recipient email address, subject line and email body.

dreams.
6 characters left

+ Add Product

Continue Preview Save Draft Place Order



Send Quote

Payment Options

- Send quote with no payment options
- Send quote and allow payment later
- Send quote and require online payment

Send Options

From: amanda.madsen@alwayshelpful.org

To: xez.leight@gmail.com

Subject: alwayshelpful Quote

You are receiving this email because a quote was requested from alwayshelpful.

[View My Quote](#)

Thank you for giving us the opportunity to serve you. If we can be of further assistance, please let us know.

Send Cancel

- The quote Email can be sent to any email address
- Email body can be edited except for the quote button can not be edited
- No quote email templates

Payment options

-

Send Quote

Payment Options ←

Send quote with no payment options
 Send quote and allow payment later
 Send quote and require online payment

Send Options

From

To

Subject

Send quote with no payment options

1. Your customer can ONLY accept or decline the quote

TOTAL	\$1,000.00
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Hourly rate runs at \$120 hr. but with your 50% discount it's \$60. A detail history of hours will be kept.

2. An order record will be created which you can manually apply payment or send an invoice with payment option

Recent Orders		
Date	Link	Payment Plan
3/8/19	Order From Quote 000049	Has A Payment Plan

Send quote and allow payment later

1. Your customer would click "Proceed"

TOTAL	\$1,000.00
% discount it's \$60. A detail history of hours will be kept.	
<input type="button" value="Decline"/>	<input type="button" value="Proceed"/>

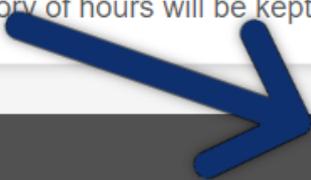
2. Then select to either pay online immediately or can pay later

Due Now: \$1,000.00	
<input checked="" type="radio"/> I am ready to pay now	<input type="radio"/> I will pay later
PAYMENT INFORMATION	
<input type="text" value="Visa"/>	<input type="text" value="* Credit Card Nur"/>

Send quote and require online payment

1. Your customer would click "Proceed"

TOTAL	\$1,000.00
% discount it's \$60. A detail history of hours will be kept.	
<input type="button" value="Decline"/>	<input type="button" value="Proceed"/>



2. Unlike the option to pay later, once "Proceed" is clicked your customer is directed to enter their payment information.

Due Now: \$1,000.00		
PAYMENT INFORMATION		
<input type="text" value="Visa"/>	<input type="text" value="* Credit Card Number"/>	
EXPIRATION DATE		
<input type="text" value="01"/>	<input type="text" value="2019"/>	<input type="text" value="CVC"/>

Important! If you want to require the quote be paid online make sure you have a merchant account, check out [Keap Payments FAQ](#) . Quotes DO NOT support PayPal.