

Quote Reminders

Introduction

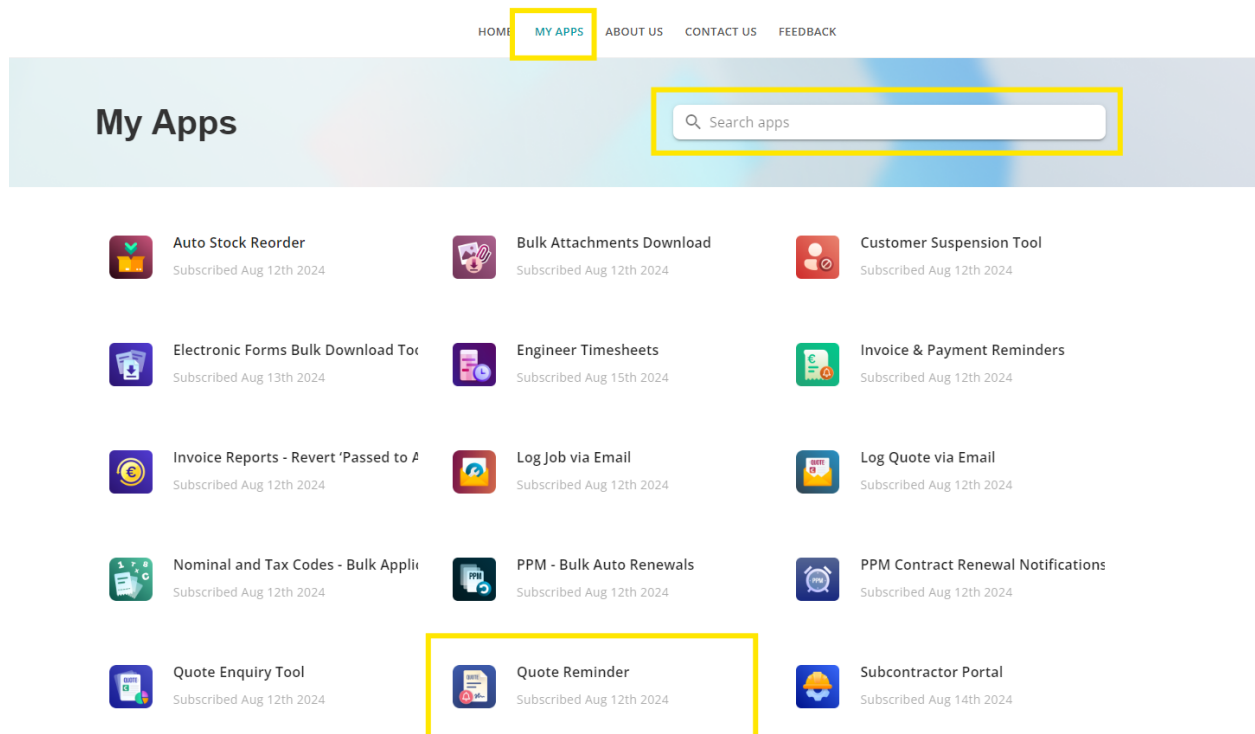
With this app you can set up quote reminders to go to the relevant contacts, meaning they never miss a quote!

This guide will show you how to set up these reminders and email templates.

Accessing the app

Click My Apps

Either Search for 'Quote Reminders', or simply click the button.



Setting up your reminders

Enter a number of days for your First Reminder. Once this has been filled in, you'll have the option to set up a Second Reminder.

Each new line will be greyed out until the previous line has some data entered.

You can choose up to 5.

The screenshot shows the 'Preference' page in the Joblogic system. On the left, there are five reminder settings: 'First Reminder' (360), 'Second Reminder' (10), 'Third Reminder' (3), 'Fourth Reminder' (empty), and 'Fifth Reminder' (empty). Each has a checkbox to its right. A yellow box highlights the first three reminders. On the right, the 'Email Subject' field contains 'AUM TESTING'. Below it, a note states: '* You can include some dynamic fields within your email templates. For Example: "Quote No [QuoteNumber] is due"'. It lists available fields: Quote Number, Customer Name, Site Name, Quote Description, Contact Name, Days Left in Expiry, and Quote expiry date. The 'Email Body' field contains a template: 'Hi [Contact_Name], This is to remind you that the [Quote_Number] with the following description is set to expire in [Days_Left] on [Expiry_Date]. [Quote_Description] Kindly review the quote and let us know if you have any questions 213=4er[Quote_Number]'. Below this, it says 'The fields you can use are listed below. You can click any option to insert it' and lists the same fields. Under 'Select Contacts', both 'Quote primary contact' and 'Site primary contact' are checked. A green 'Update Preferences' button is at the bottom right.

On the right, you can set up the Email Subject and Email Body.

This screenshot is similar to the previous one but with a yellow box highlighting the right-hand section, which contains the email configuration. It includes the 'Email Subject' field, the dynamic field note, the list of available fields, the 'Email Body' field with its template, the list of fields for insertion, the 'Select Contacts' section with both options checked, and the 'Update Preferences' button.

To enter Quote specific information, you can use the tags listed. To do this, firstly click into the Email Subject or Body, then click on a field. This will put a placeholder in your Email, so it pulls through the relevant information for each specific quote.

[HOME](#)
[MY APPS](#)
[ABOUT US](#)
[CONTACT US](#)
[FEEDBACK](#)

Preference

First Reminder360

Second Reminder10

Third Reminder3

Fourth Reminder

Fifth Reminder

Email Subject:

AUH TESTING

* You can include some dynamic fields within your email templates. For Example: "Quote No. [QuoteNumber] is due"

The fields you can use are listed below. You can click any option to insert it

Quote Number Customer Name Site Name Quote Description Contact Name Days Left in Expiry Quote expiry date

Email Body:

H ([Contact_Name],

This is to remind you that the ([Quote_Number]) with the following description is set to expire in ([Days_Left]) on ([Expiry_Date]).

([Quote_Description])

Kindly review the quote and let us know if you have any questions 213=4er([Quote_Number])

The fields you can use are listed below. You can click any option to insert it

Quote Number Customer Name Site Name Quote Description Contact Name Days Left in Expiry Quote expiry date

Select Contacts:

☒ Quote primary contact
 ☒ Site primary contact

Update Preferences

Select the contacts you want the reminders to be sent to. This will only go through if there is a valid email address.

[HOME](#)
[MY APPS](#)
[ABOUT US](#)
[CONTACT US](#)
[FEEDBACK](#)

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Select Contacts:

☒ Quote primary contact
 ☒ Site primary contact

Update Preferences

Click Update Preferences when you are happy with the changes.

[HOME](#)
[MY APPS](#)
[ABOUT US](#)
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[FEEDBACK](#)

Preference

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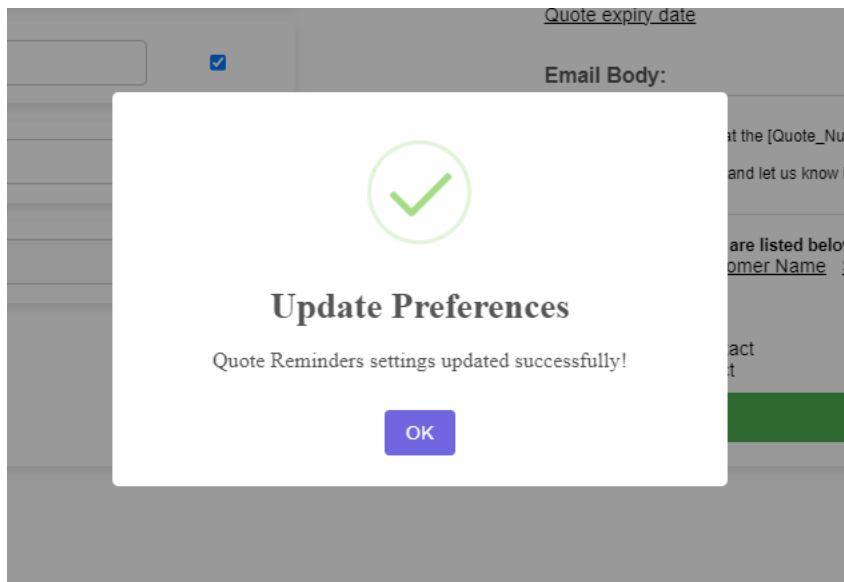
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Select Contacts:

☒ Quote primary contact
 ☒ Site primary contact

Update Preferences



Once updated, the preferences will be set for all your quote reminders.