Quote Reminders

Introduction

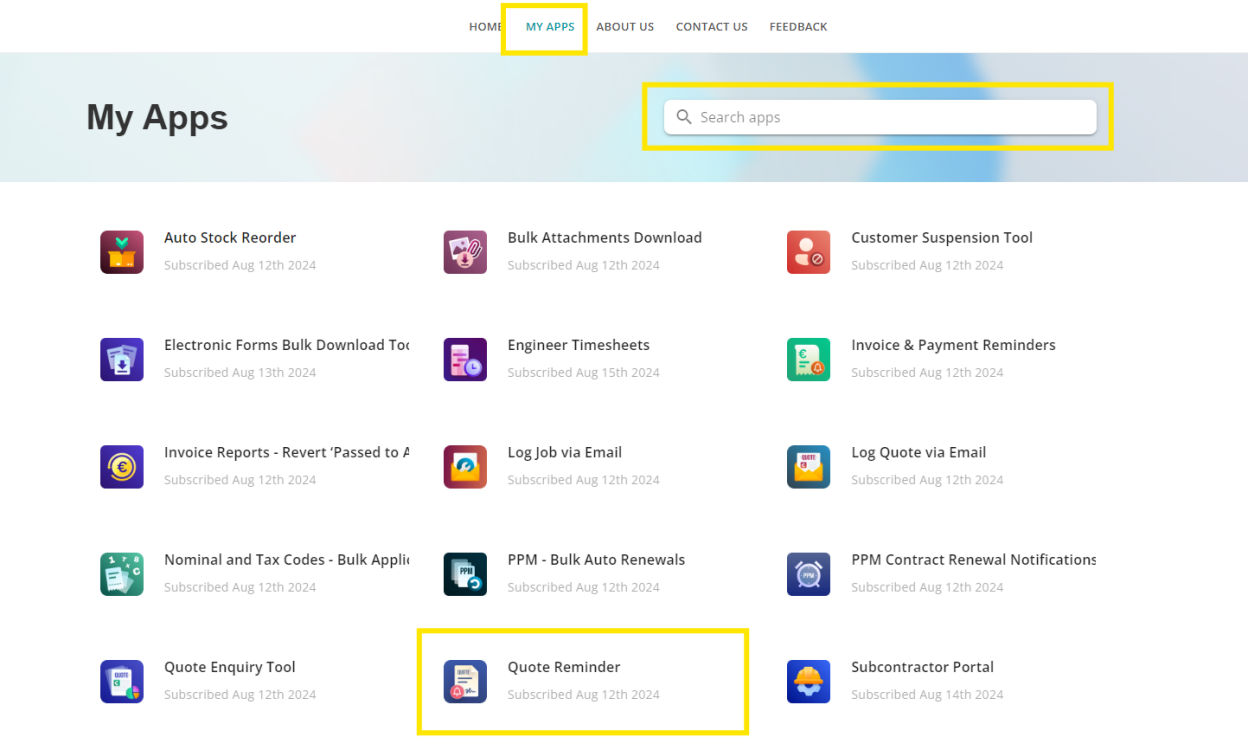
With this app you can set up quote reminders to go to the relevant contacts, meaning they never miss a quote!

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.

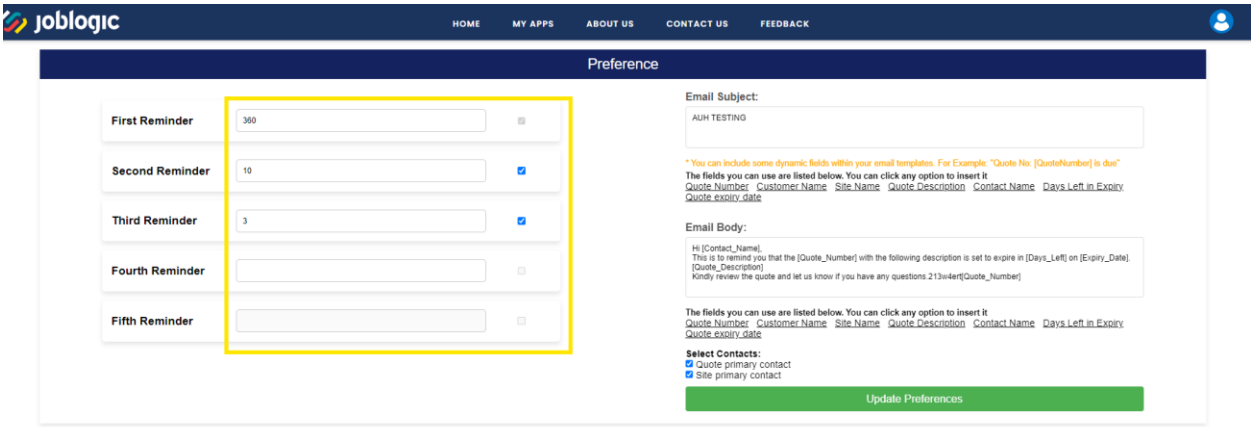


Setting up your reminders

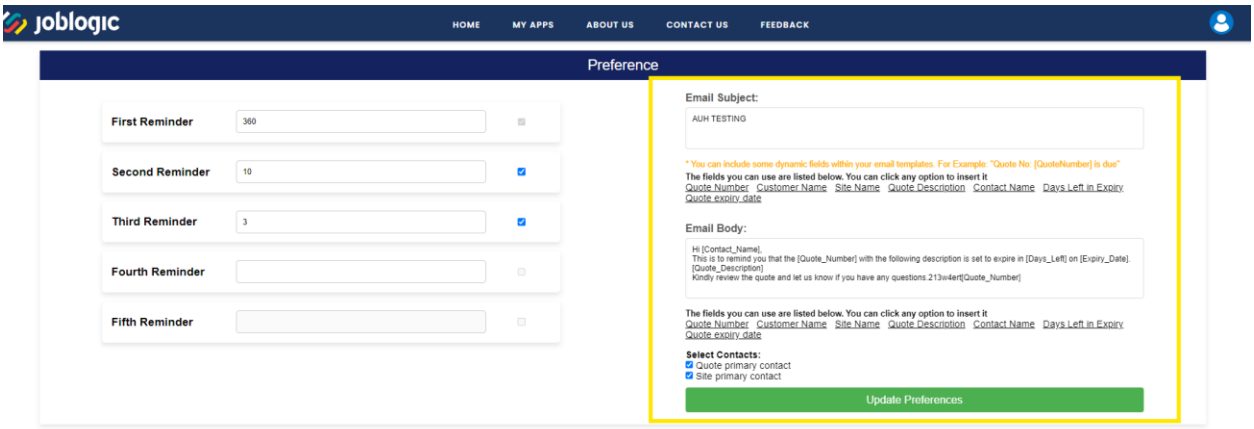
Enter a number of days for your First Reminder. Once this has been filled in, you’ll have the option to set up a Second Reminder.

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

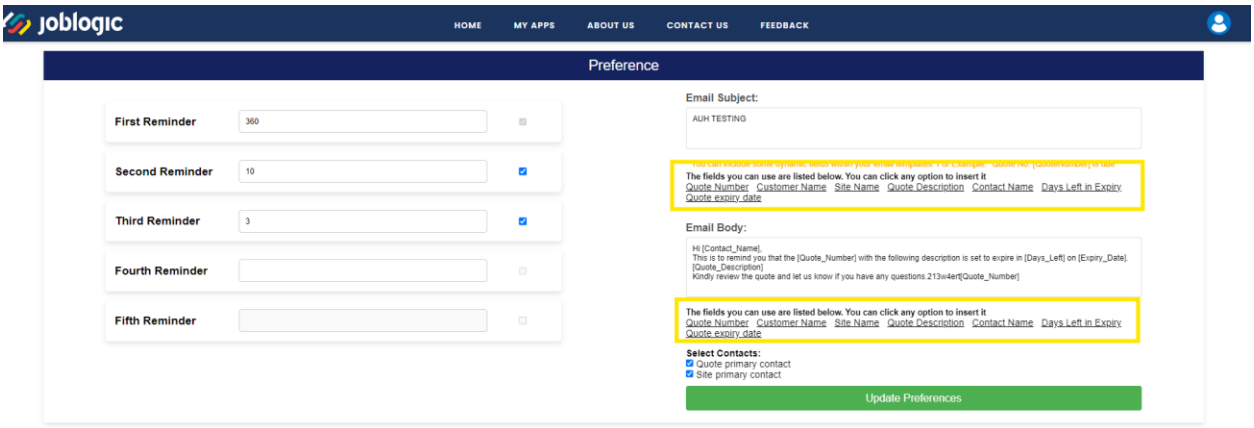
You can choose up to 5.



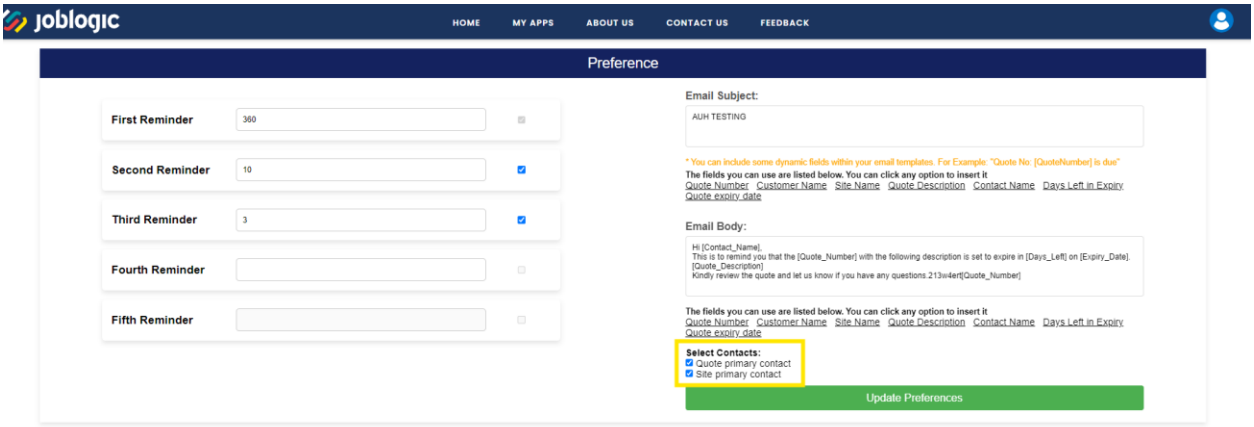
On the right, you can set up the Email Subject and Email Body.



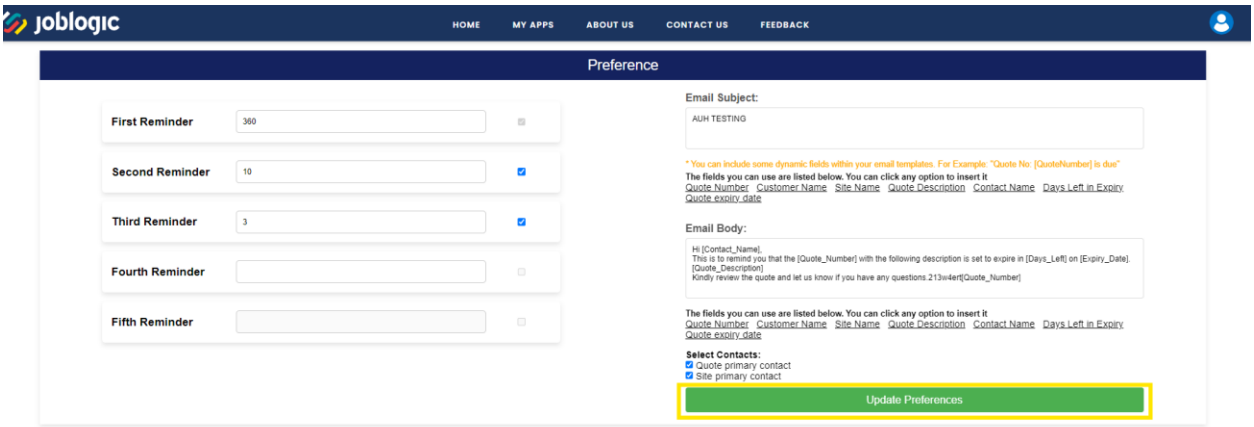
To enter Quote specific information, you can use the tags listed. To do this, firstly click into the Email Subject or Body, then click on a field. This will put a placeholder in your Email, so it pulls through the relevant information for each specific quote.

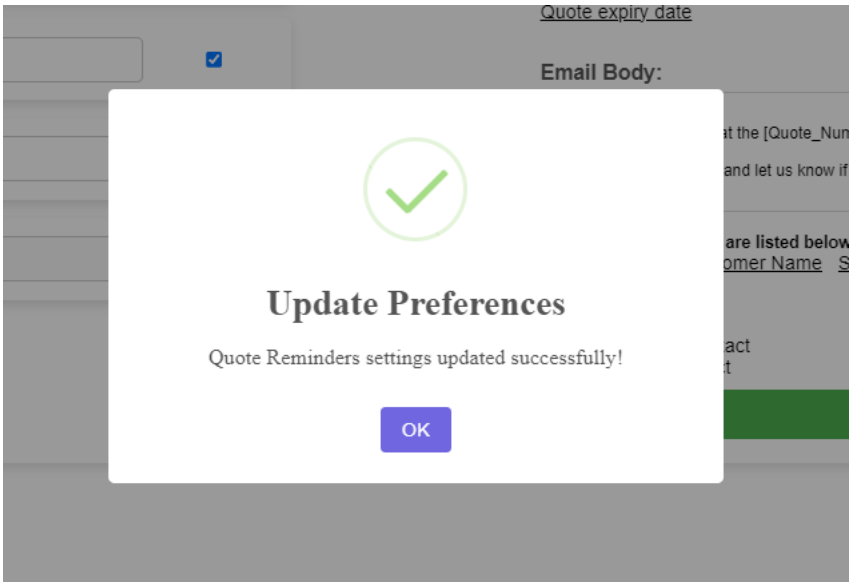


Select the contacts you want the reminders to be sent to. This will only go through if there is a valid email address.



Click Update Preferences when you are happy with the changes.





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