Create Proposal with E-Signing

1. You can also send out a **Proposal with E-Signing** via the CRM so your client can approve a quote and that approval will go straight back into the CRM. To do this navigate to the **Opportunity** that the **Proposal** will be sent to and in the **Actions Menu** select the **Send Proposal** option.
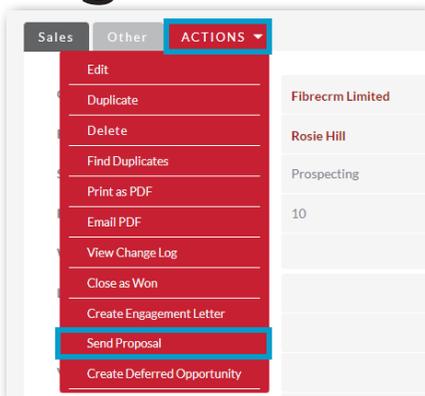
2. In the **Pop Up** box you can select the who the **Proposal** will go to. You can also select a **Brand** and an **Email Template** which will automatically fill the **Email Subject** and **Body**. The **PDF Template** field is where you can select the **Proposal** the client will receive. Select **Preview** to view that **Proposal**. Once you're happy with everything Click **Send Email**.
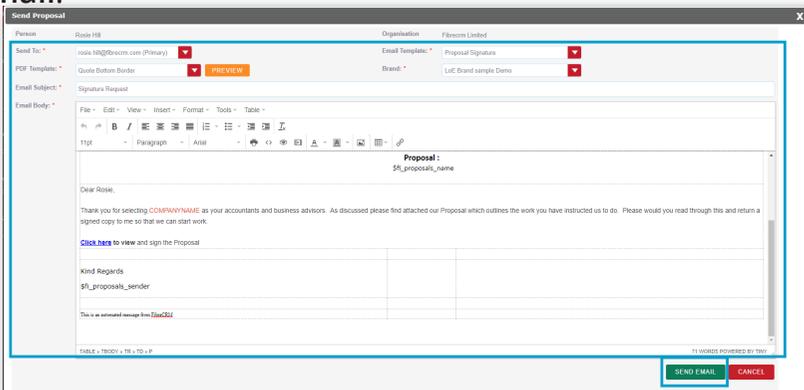
3. Next you'll be taken back to the **Opportunity**. In there the **Proposal Status** field will updated to **Sent**. You can also scroll down the **Proposal Subpanel** in the Opportunity where you can view the **Status** of the **Proposal**.

4. Once the email has been sent your customer will then receive an email containing a link to the **Proposal** for them to view and sign.
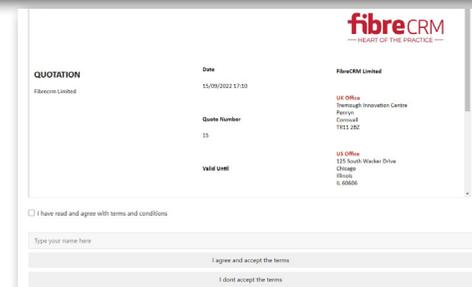
5. If your client has viewed the **Proposal** the **Status** in the **Opportunity** and **Subpanel** will update automatically to **Viewed**. If they then accept the Proposal the status will automatically update to **Accepted**, the **Accepted Date** will also be added. If your client declines this will also automatically update the status as well. In the **Proposal Subpanel** the name of the **Proposal** is hyperlinked and selecting it will take you to the **Proposal Record**.

6. In the **Proposal Record** you can view information regarding the **Proposal** such as; **Proposal Status**, the **Accepted Name**, **Accepted Date** and the **IP Address** of the signer of the **Proposal**. In the **Proposal PDF** field you can view or download a copy of the **Proposal** with the **Digital Acceptance Information**.