

Create and send a Quote

This article applies to:

[Pro](#)

[Max](#)

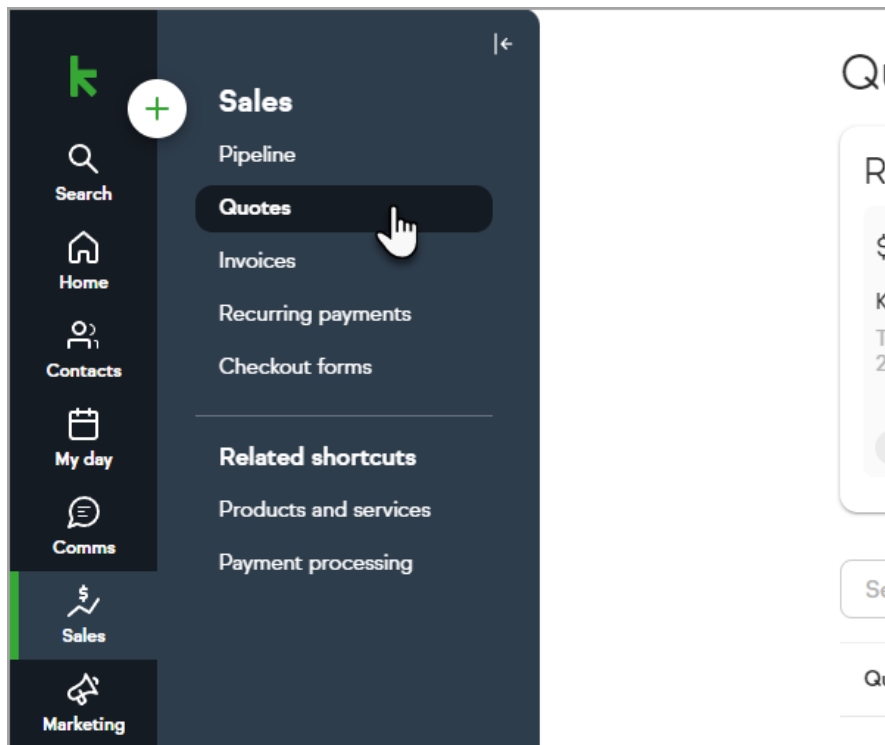
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Create professional looking quotes to send directly to your contacts. Customers can easily accept your quote by clicking the 'Accept Quote' button, and your quotes can be quickly converted into a payable invoice with the click of the 'Convert to invoice' button. Track the status of all of your quotes in one place and get notified when your quote is accepted so you can plan your work. The quotes feature can be found under the 'Money' tab, along with invoicing.

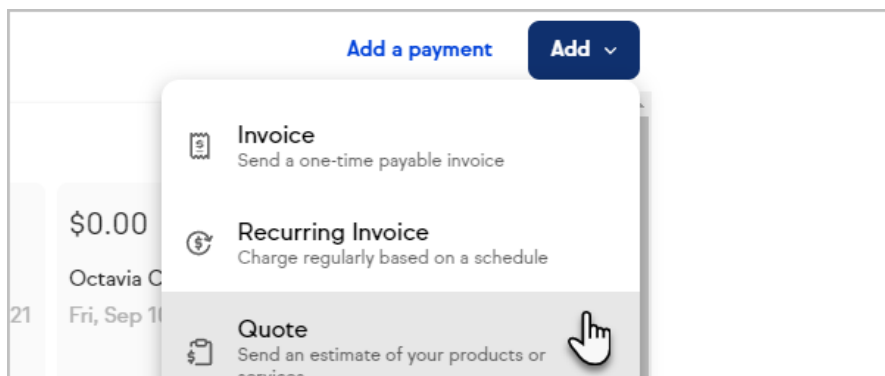
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Create a Quote

1. Go to **Sales > Quotes** from the left navigation

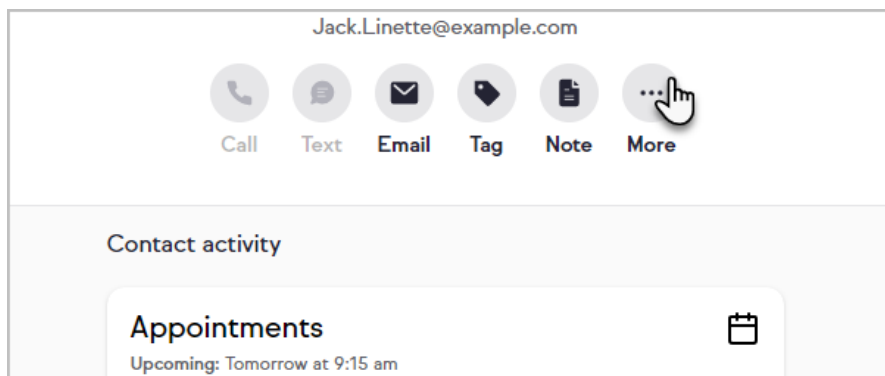


2. Click **Add** and select **Quote**

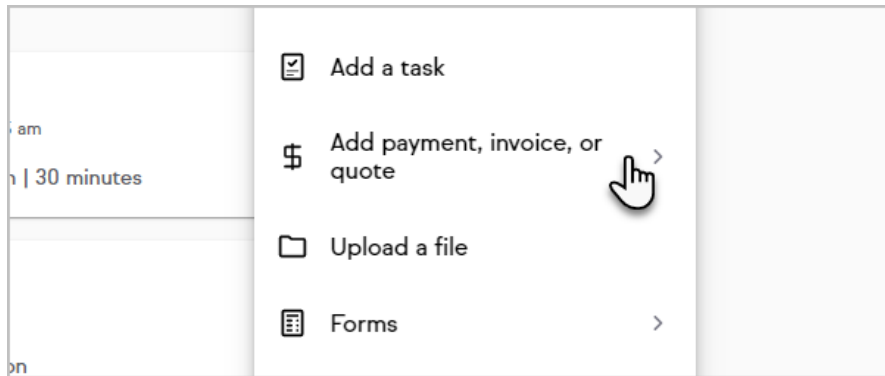


Create a quote from the contact record

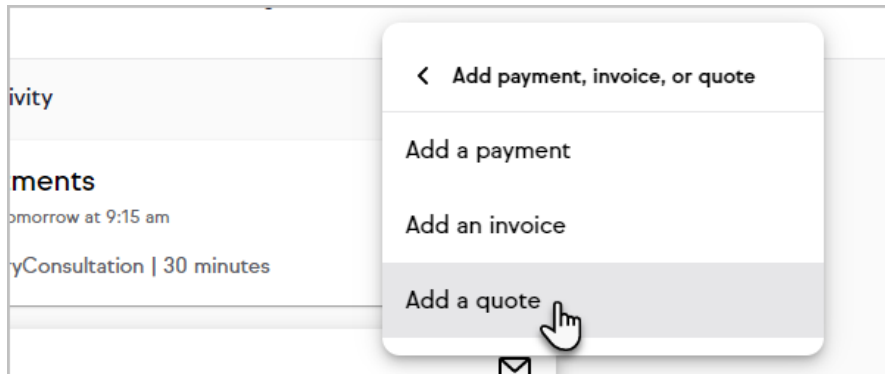
1. Navigate to a contact record
2. Click **More**



3. Click **Add payment, invoice, or quote**

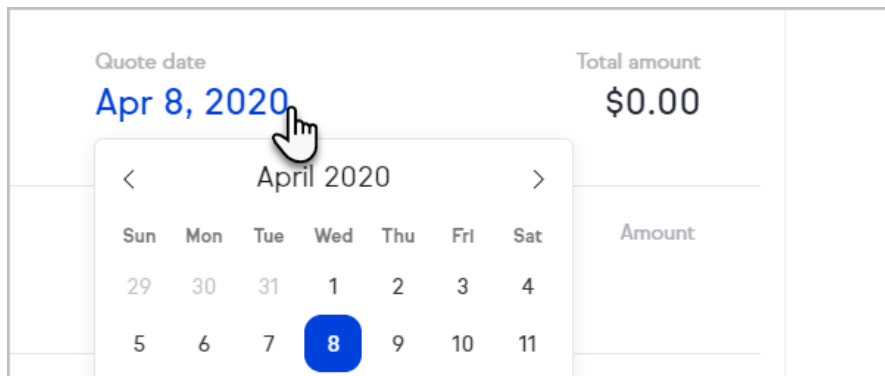


4. Select **Add a quote**

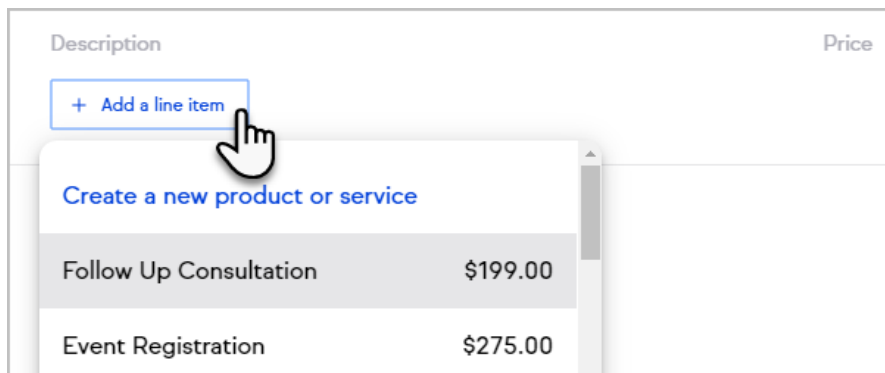


Customize your quote

1. Adjust the quote date by clicking the date and selecting from a date picker



2. Click **Add line item** to select or add a product or service



3. Add **Notes** and **Terms** by typing in the notes and terms section of the quote

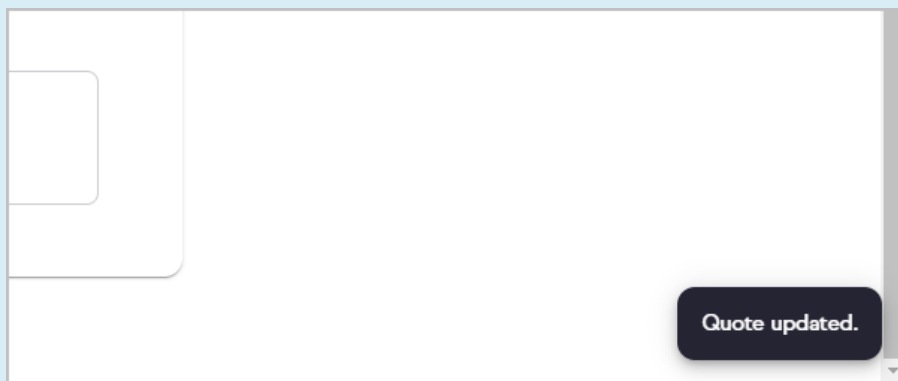
Notes

Add a note (optional)

Terms

Add terms (optional)

Pro-Tip! All quote progress automatically saves and is indicated by a message on the bottom of the screen



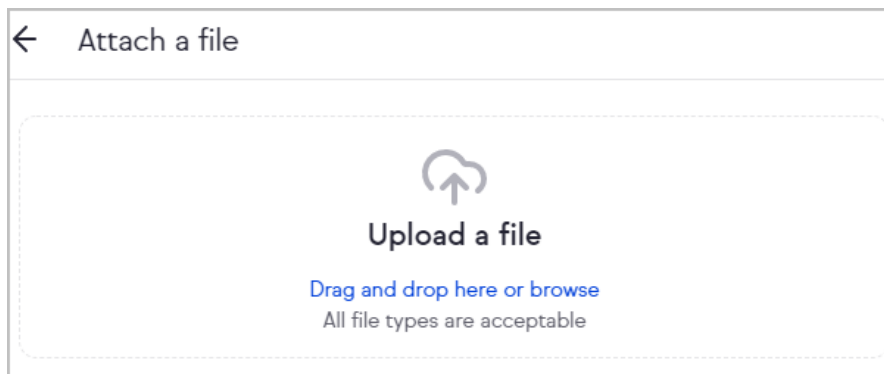
Attach files

Any attached files will be included in the email to your client and saved to the contact record for future reference.

1. Click **Attach a file**



2. Drag and drop the file into Keap or click to browse your computer

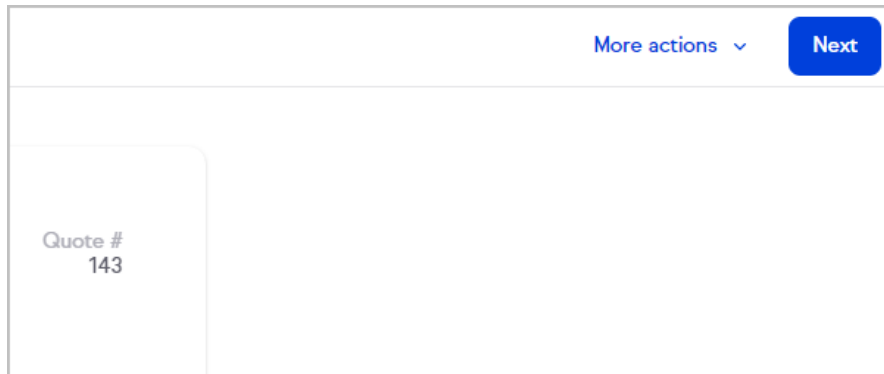


3. The attached files will be listed at the bottom of the builder

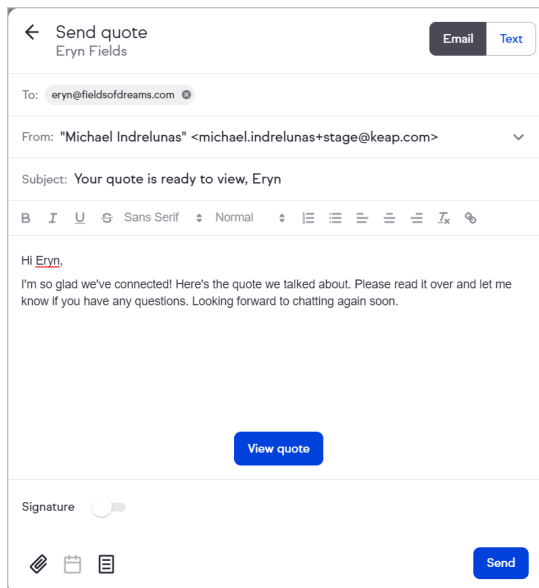


Send your quote

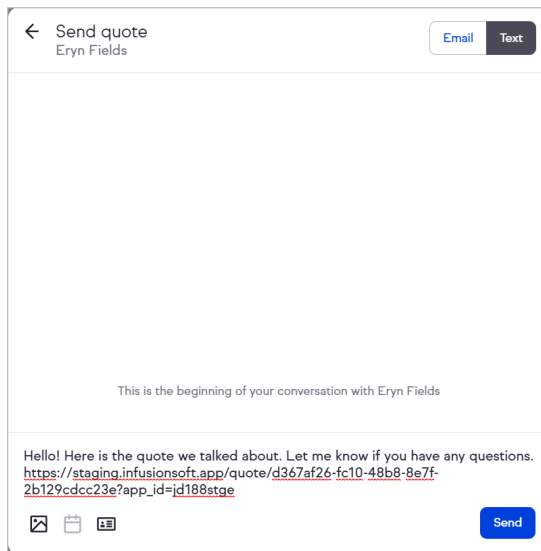
1. Click **Next** to personalize the email before sending



2. When finished click **Send** to send the quote as an email

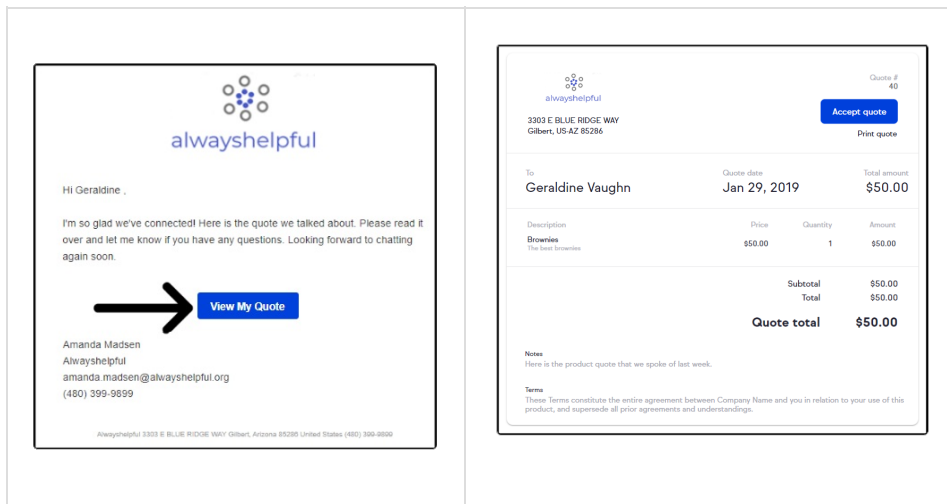


3. Or click the **Text** toggle to send the quote as an SMS
Note: Sending a quote via SMS requires Keap Business Line



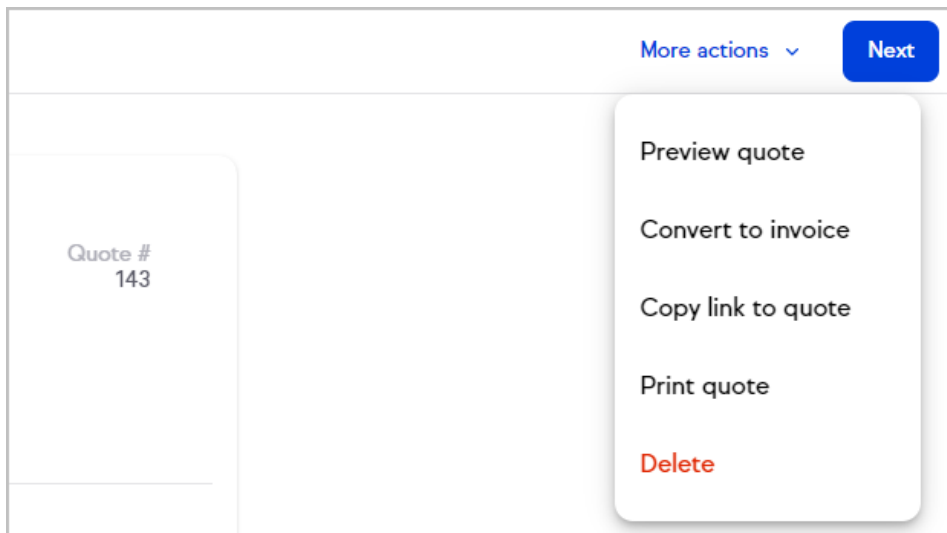
4. Customize the pre-written message as needed and click **Send**

Email examples



More actions

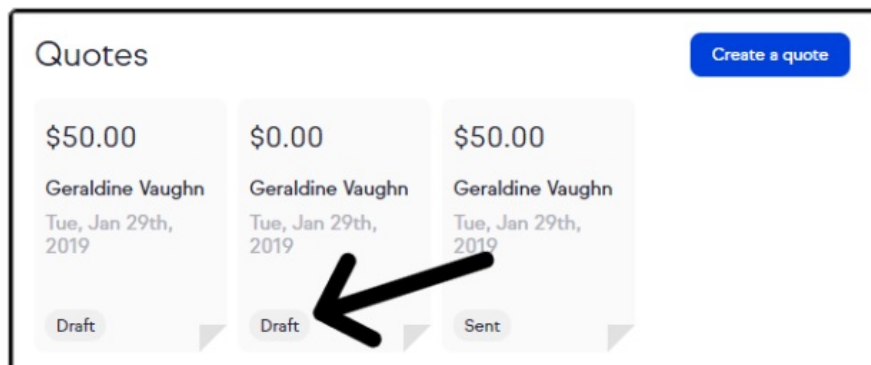
The **More actions** drop down menu contains **Preview quote**, **Convert to invoice**, **Copy link to quote**, **Print quote**, or **Delete**



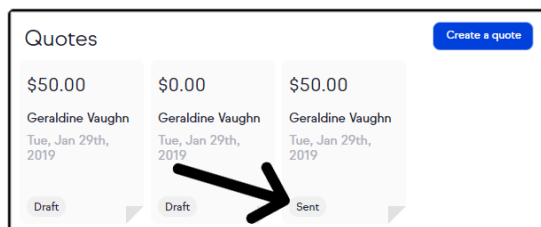
- **Preview quote** an example of what your client will receive
- **Convert to invoice** creates an invoice from the quote
- **Copy link to quote** automatically copies the link to the quote. The link can paste in an email or text message
- **Print quote** pulls up options to printer
- **Delete** removes quote record

Quote statuses

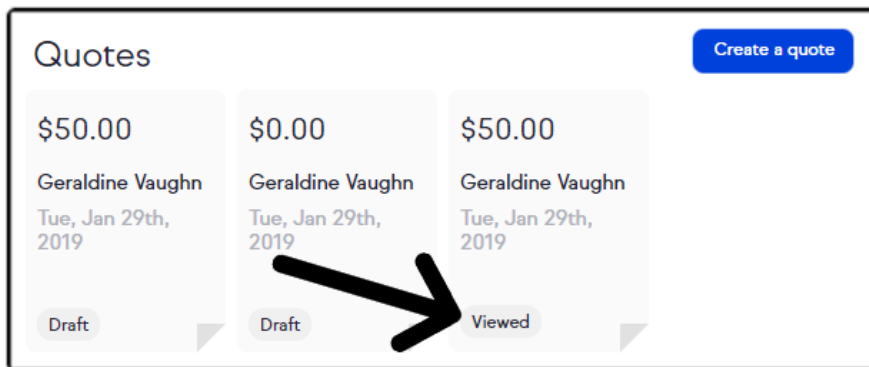
- **Draft** indicates the quotes has not been sent



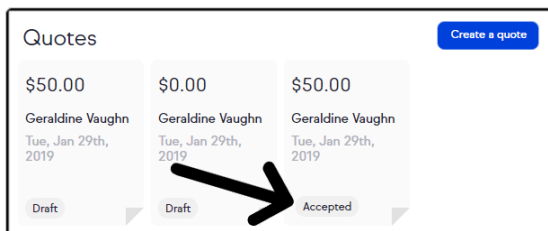
- **Sent** the quote email has been sent to your customer



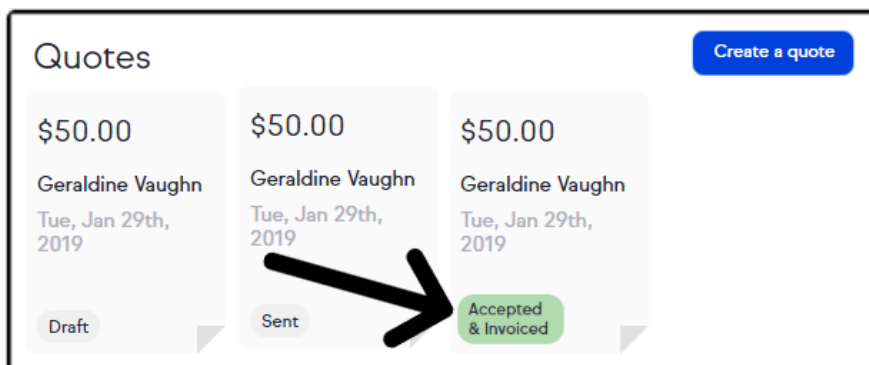
- **Viewed** the quote was viewed by your customer



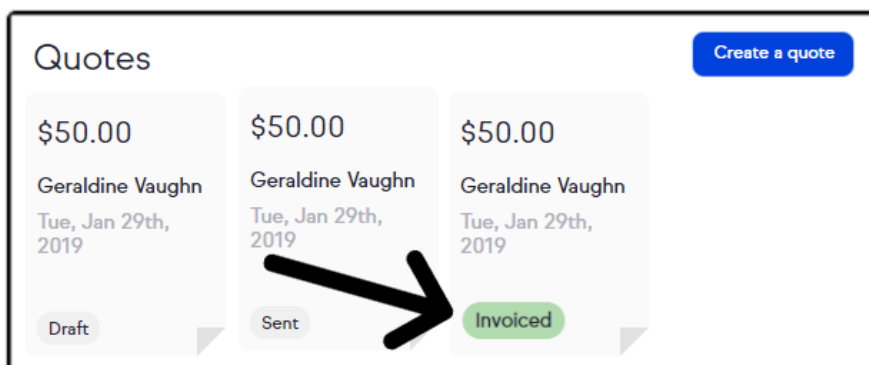
- **Accepted** your customer accepted their quote



- **Accepted & invoiced** the accepted quote was converted to an invoice



- **Invoiced** quote was converted to an invoice without your customer accepting it



FAQs

What is the difference between a quote and an invoice?

The primary difference between quotes and invoices is that invoices are payable whereas quotes are not. Quotes have the ability to be accepted through an 'accept quote' button and "converted to an invoice". Quotes also have terms and

conditions that can be added.

Can I access the products or services I already have in my app in a quote?

Yes, you can access any product or service you have in the app for your quote. You can also create those line items directly in the quote and they will save to your app.

Can I edit a quote after I've sent it?

Yes, you can edit an quote after it's been sent. The quote will enter an "updated" state and the client will be able to view the changes on that quote automatically, or you can re-send the updated quote.

Will quotes trigger automation?

You can use the quote status goal to trigger automation with quotes that are sent, viewed, and accepted.
