

Quotes & sales proposals

Polished proposals, sent in minutes.

COMPANYMESH · SALES PROPOSAL

PROPOSAL

D-2026-221 · v2

Viewed

Counter fit-out	1	4,800.00
Custom furniture	6	7,200.00
Installation and finishing	1	1,950.00
Loyalty discount		-600.00
Total excl. VAT		13,350.00
VAT 21%		2,803.50
Total incl. VAT		16,153.50

Valid until 17/10/2026

CUSTOMER JOURNEY

✓ Sent
12/09 · 09:04

✓ Viewed 3x
Last: 14/09

● Signature
Pending

● 30% deposit
On signature

✓ Proposal opened

Atelier Nérévance
Just now · 3rd view

Follow up

Polished proposals, sent in minutes.

A quote often takes too long: copying prices, recalculating, formatting, sending, chasing. The Quotes & proposals module produces professional documents from your catalogue, tracks when the customer reads them and moves straight on to signature and payment.

More time to sell

Lines, discounts and totals calculated automatically.

A professional image

On-brand documents, with annexes and terms included.

Precise tracking

You know when the customer opens your proposal.

A fast close

E-signature and online deposit right away.

In this module

- 1 Fast editing from the catalogue
- 2 Documents that look like you
- 3 Versions, validity and contracts
- 4 Sending and read tracking
- 5 Online signature and deposit
- 6 Internal approval flow

FEATURES

DESCRIPTION	QTY	UNIT PRICE	DISCOUNT	TOTAL
Counter fit-out	1	4,800.00	—	4,800.00
Custom furniture	6	1,250.00	-4%	7,200.00
Installation and finishing	1	1,950.00	—	1,950.00
Option: LED lighting	1	890.00	Option	—
Total excl. VAT				13,350.00

1

Fast editing from the catalogue

Add a product, the rest follows.

Lines are filled in from your catalogue: description, unit, price, VAT. Line or global discounts, optional lines, notes and annexes are added in one click. Totals recalculate live.

What it enables

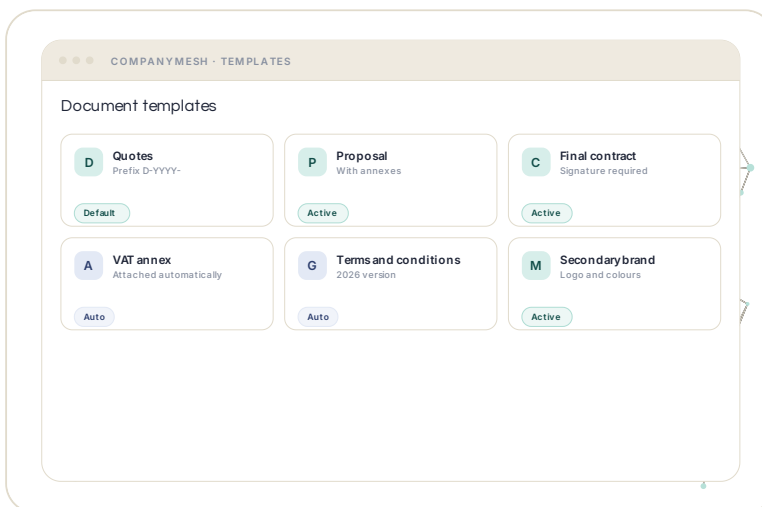
- Instant product search
- Line discounts and a labelled global discount
- Lines included in the proposal or not
- Notes, annexes and special terms

2

Documents that look like you

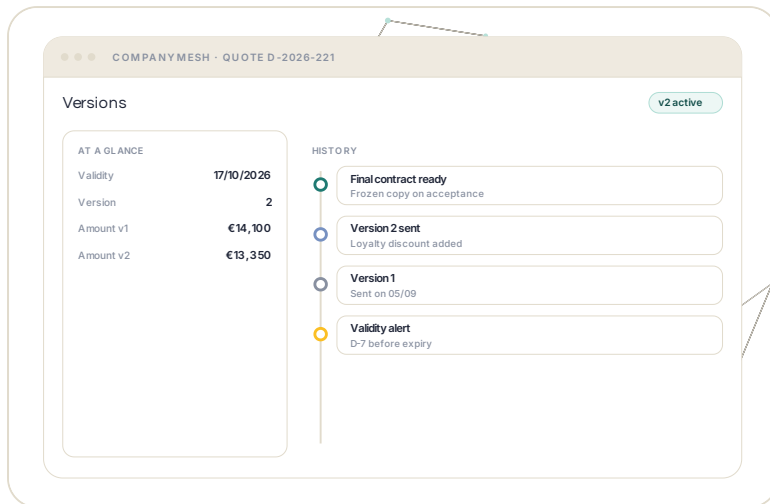
Your layout, your legal notices.

Every document uses your logo, colours, terms and conditions and mandatory notices. Several companies or brands can coexist, each with its own templates.



What it enables

- Custom document templates
- Configurable numbering (prefix, format)
- Terms and annexes attached automatically
- Multi-company and multi-brand



3 Versions, validity and contracts

From provisional to final, with no confusion.

Every change creates a new version, and the history stays available. A validity period is shown on the document. On acceptance, a frozen copy is kept and can become the final contract.

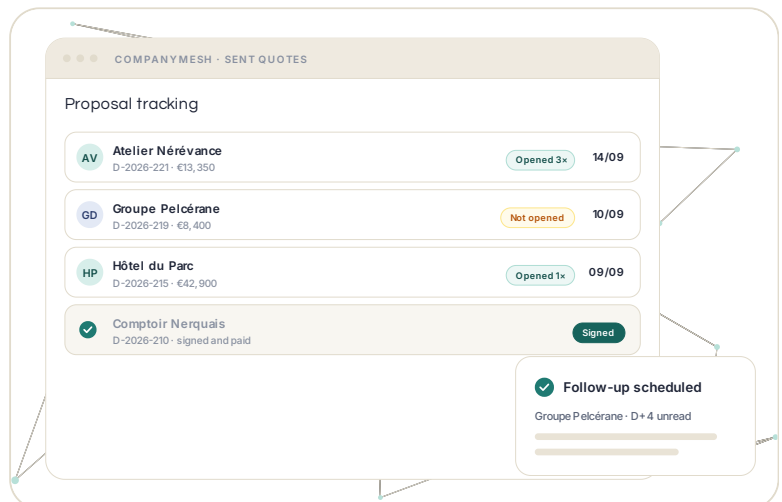
What it enables

- Successive versions and comparison
- Validity date and expiry alerts
- Frozen copy on acceptance
- Provisional quote → final contract

4 Sending and read tracking

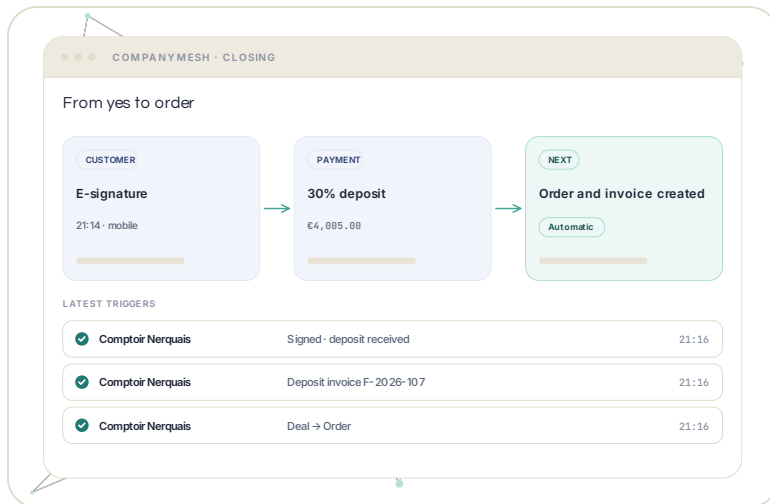
You know when to follow up.

The quote is emailed from the tool with a suitable message template. The customer views it online through a secure link: every opening is recorded and can move the deal forward automatically.



What it enables

- Email sending with templates
- Opening history
- Online viewing by the customer
- Automatic follow-up if there's no reply



5 Online signature and deposit

The customer says yes, everything follows.

The customer signs electronically and pays the deposit from the same link. The quote status, the deal stage and the deposit invoice update without any manual step.

What it enables

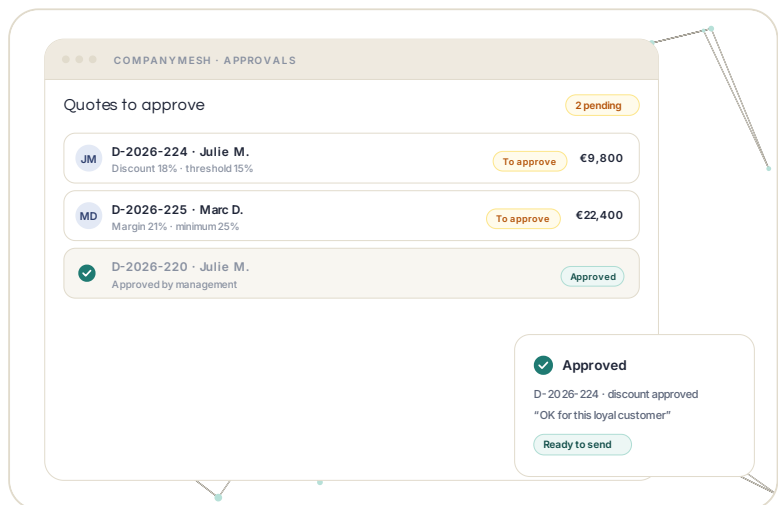
- Legally valid e-signature
- Deposit paid by card or bank transfer
- Status updated automatically
- Order and deposit invoice created

Example — Signed at 9 pm on a phone: by the next morning, the supplier order is ready.

6 Internal approval flow

The right margins, before sending.

Above a discount threshold or below a minimum margin, the quote is submitted for approval. The manager approves or comments in one click.



What it enables

- Discount and margin thresholds
- One-click approval
- Internal comments hidden from the customer
- Approval history

TAILORED

Adapted to your business

Quote, offer, sales proposal, provisional then final contract: we reproduce **your** documents, **your** legal notices, **your** annexes (VAT rates, usage rights, terms of sale) and **your** approval flow. The document template faithfully mirrors your layout.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

E-signature

SignWell

Yousign

DocuSign

Online payment

Stripe

PayPal

Mollie

Alma

Email

Microsoft 365

Outlook / Exchange

Gmail

Documents

PDF

Word

Google Drive

OneDrive / SharePoint

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

`crm.pipeline` Pipeline & opportunities

`crm.pricing` Pricing & margins

`erp.catalog` Product catalogue

`dms.esign` E-signature

`erp.payments` Online payments

`erp.billing` Invoicing

Let's talk about your future tool

Tailored demo, by appointment.

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