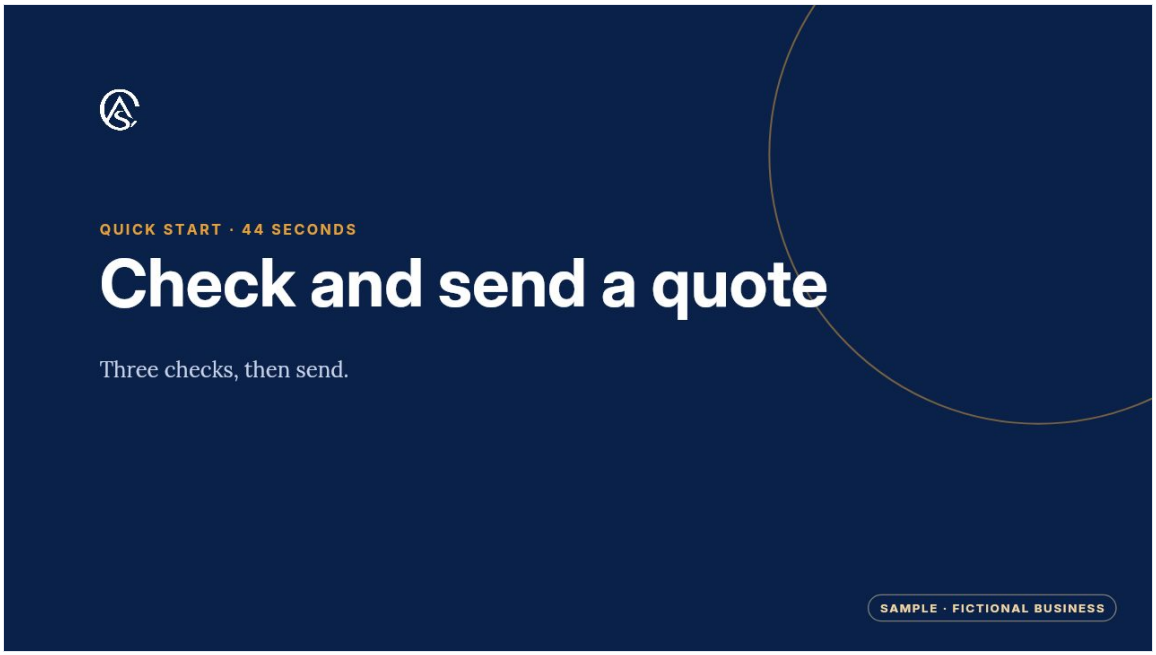
QUOTE & FOLLOW-UP ASSISTANT · QUICK START

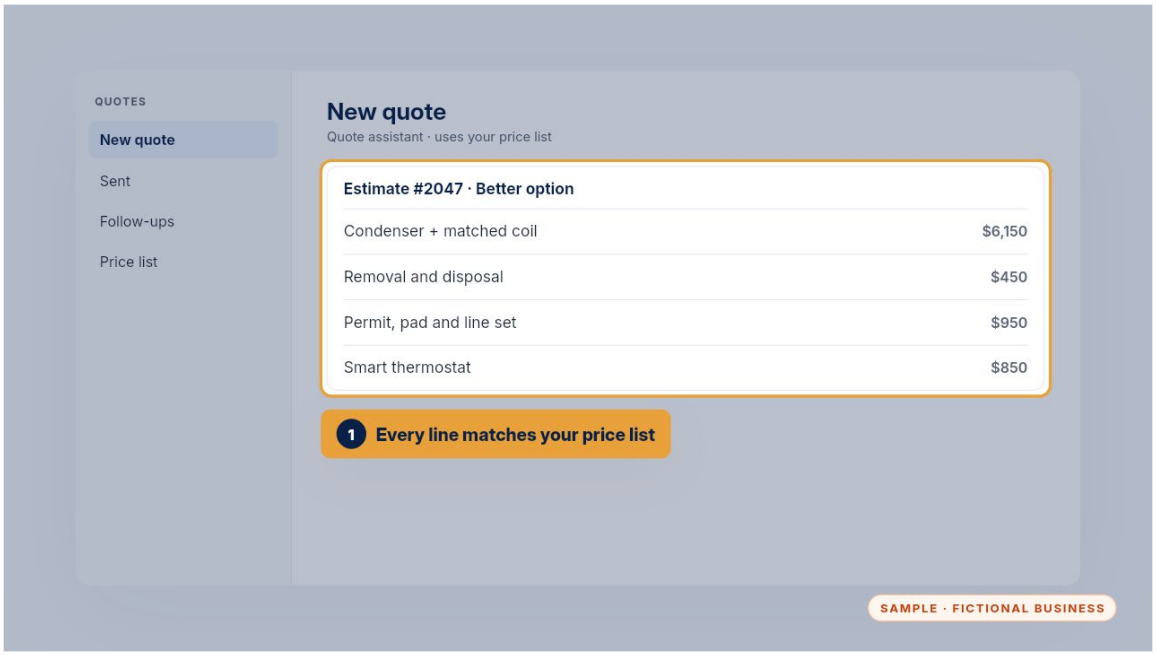
Check and send a quote

The three checks before a quote goes out, and how the follow-ups get set.

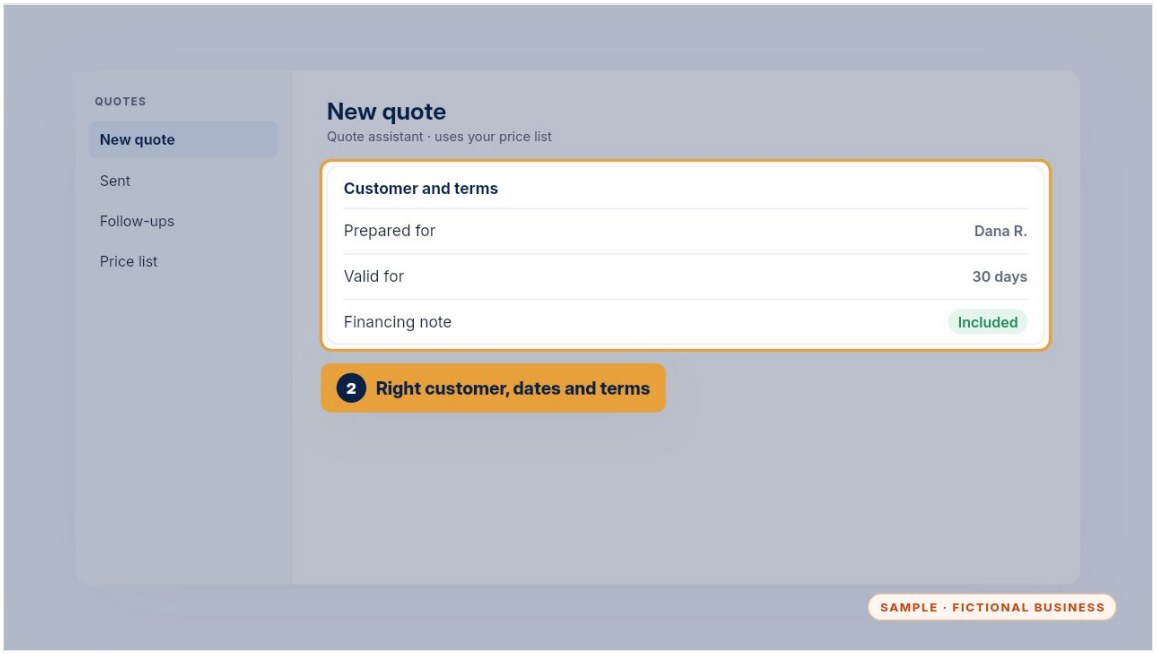
Watch the narrated video: https://openarmsolutions.com/guides/quote-follow-up/check-and-send-a-quote



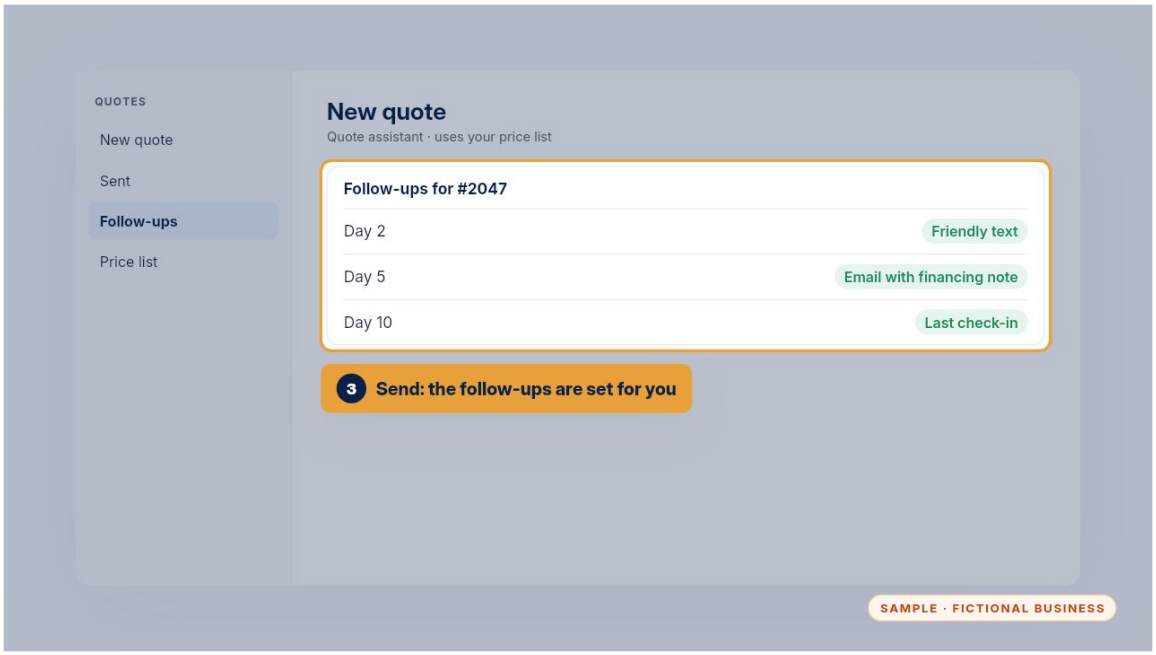
1. Before a quote goes out, three quick checks. They take about a minute and catch almost every mistake.



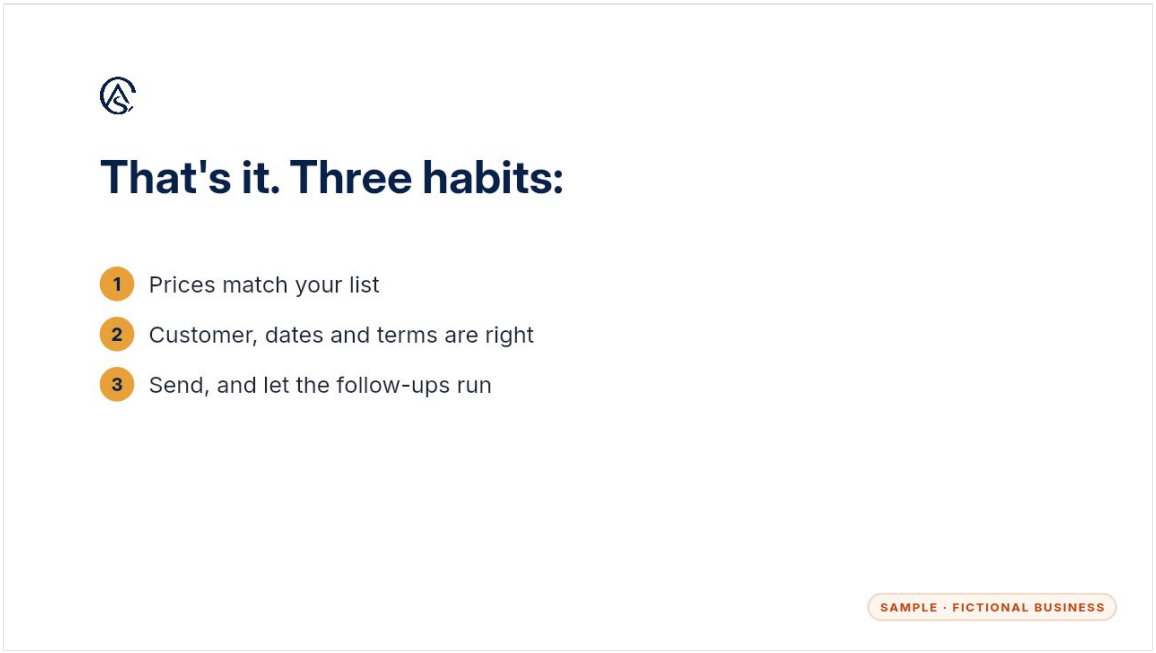
2 First, check that every line matches your price list, and nothing is missing, like the permit or disposal of the old unit.



3 Second, check the customer's name, how long the quote is valid, and the financing note, so the customer knows the price holds and how to pay.



4 Third, send it. The follow-ups on day two, five and ten are set automatically: a friendly text, then an email, then a last check-in.



5 Check the prices, check the details, and send. The follow-ups take it from there, and you hear back as soon as the customer replies.