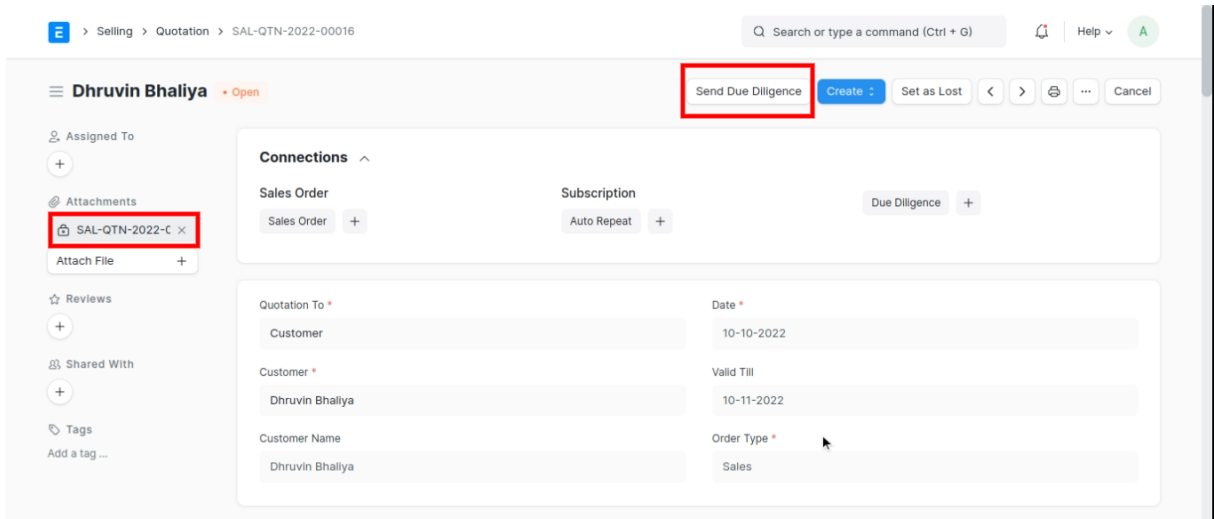
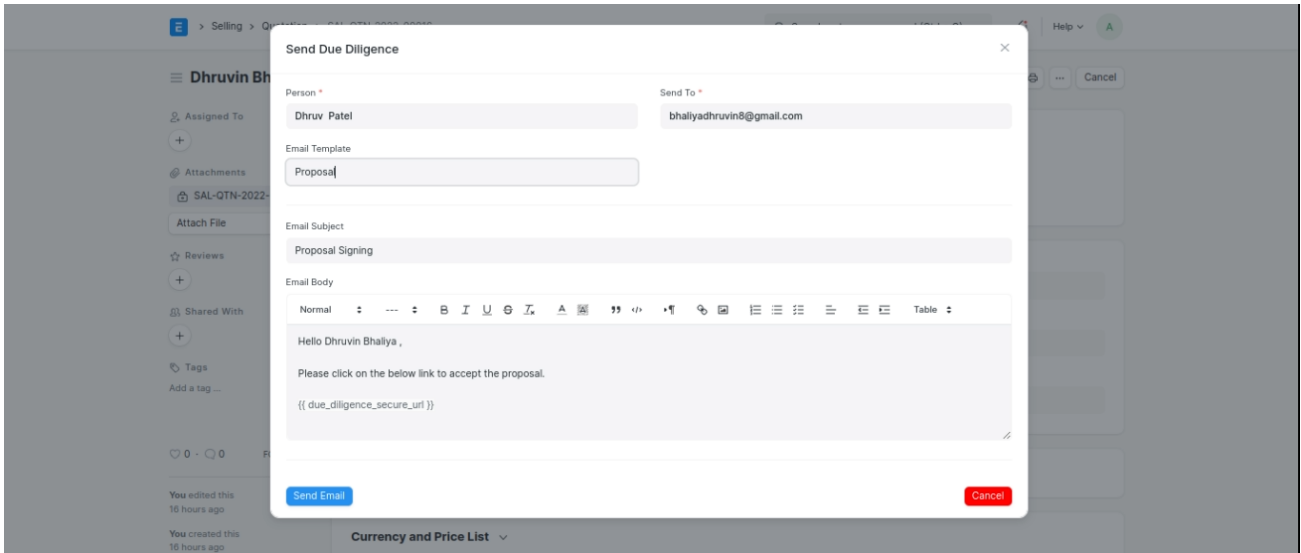


Send Due Diligence to Customers - Help

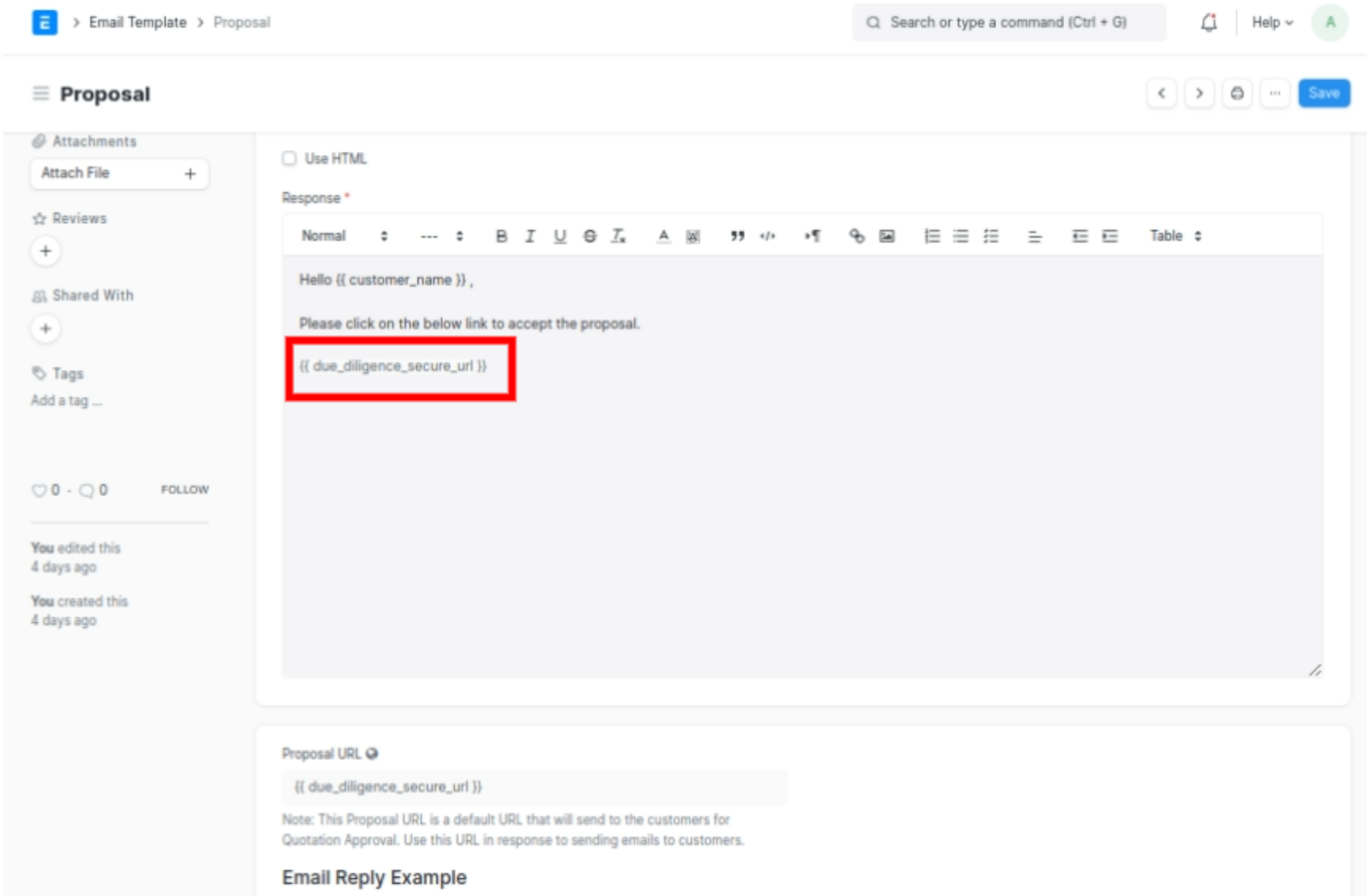
1. “Send Due Diligence” button will appear and the quotation PDF will automatically be generated once the user “submits” the quotation record. PDF will be available on the left sidebar for quick viewing. Whenever the user clicks on the “Send Due Diligence” button popup will open to send a secure link to associate with a particular quotation record for the due diligence.



2. On the popup window - users can select the email template wherever available in the ERP system and also be able to edit the email body content before sending it to the customer. The Due Diligence secure link automatically replaced the email body. Make sure the “due diligence secure url” variable is available in your email template for auto-replace.



3. On click “Send Email” - the customer will receive a secure due diligence link via email. Customer email ID will be pre-populated with whatever is set on the customer record.
If you do not have an email template, go to the email template list and create a new email template.



4. After sending an email to the customer, the ERP user will be redirected to the “Due Diligence” record for review - who will receive email and future tracking data for that particular request.

Due Diligence-00313

Assigned To: +

Attachments: Attach File +

Reviews: +

Shared With: +

Tags: Add a tag ...

0 · 0 FOLLOW

You edited this just now

You created this just now

Quotation
SAL-QTN-2022-00016

Diligence Status
Sent

Name: Dhruvin Bhaliya

Sender: Administrator

Sender Email: dhruvin.oepl@gmail.com

Accepted Date:

Decline Date:

URL: <http://homedesign.com:8000/proposal?quotation=SAL-QTN-2022-00016>

Created By:

Description:

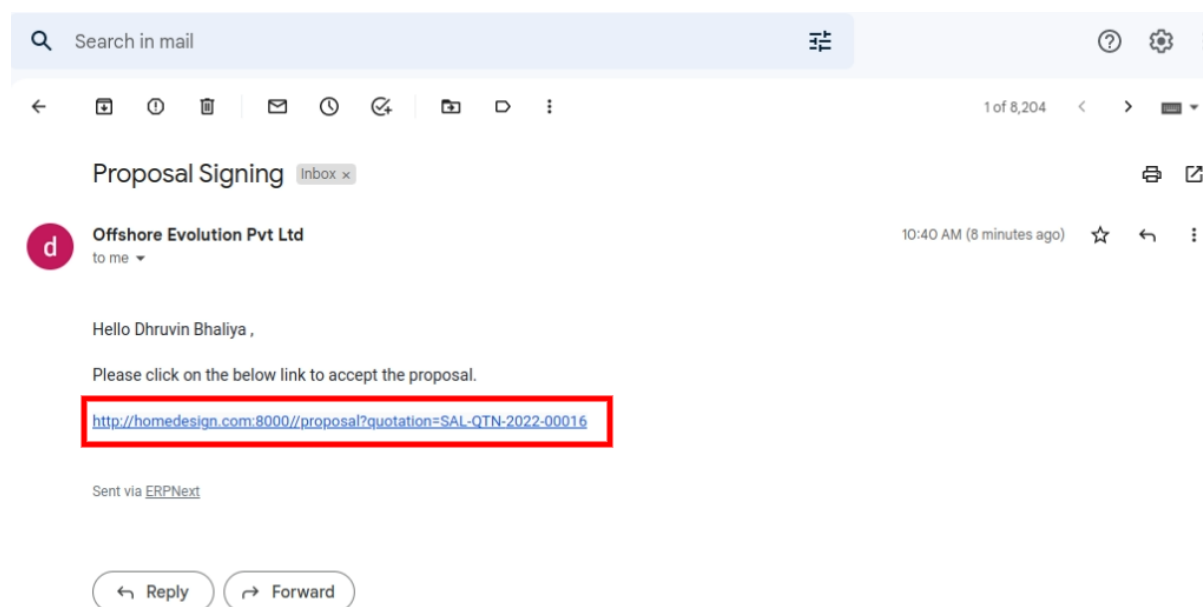
Send To: bhaliyadhruvin8@gmail.com

Assigned To:

Accepted Name:

Decline Reason:

5. In the customer email, a link will appear like the below screenshot.



Once a customer clicks on that link, he will be redirected to the website for a review quotation. On this page, customers either Accept or Decline the sent quotation.

Home Design Contact Blog Products Login

Proposal Signing

Offshore Evolution
BY THE WAY WE DESIGN

QUOTATION
SAL-QTN-2022-00016

Customer Name: Dhruvin Bhaliya Date: 10-10-2022
Valid Till: 10-11-2022

Address: D-803 Titanium City Centre
Ahmednagar Road
Ahmedabad
Gujarat, State Code: 24
Postal Code: 380015
India
Contact: Dhruva Patel

Sr	Item Code	Description	Image	Quantity	Discount Amount	Rate	Amount	Rate of Stock UOM
1	Luxurious Chair	Luxurious Chair polish A		1	₹ 0.00	₹ 3,500.00	₹ 3,500.00	₹ 3,500.00

Total Quantity: 1 Total ₹ 3,500.00
Output Tax SGST @ 9.0 ₹ 315.00
Output Tax CGST @ 9.0 ₹ 315.00
Grand Total: ₹ 4,130.00

☐ I have read and agree with terms and conditions

Type your name here

I agree and accept the terms

I dont accept the terms

6. On “Accept” - It will also update the “Due Diligence” record status with the accepted date-time, IP, etc.

Due Diligence-00364

Quotation *

SAL-QTN-2022-00027

Customer Name

Offshore Evolution Pvt Ltd

Diligence Status

Accepted Digitally

Email Details

Sender

Administrator

Sender Email

dhruvin.oepl@gmail.com

Send To

bhaliyadhruvin8@gmail.com

Acceptance and Decline Details

Accepted Date

01-11-2022 17:44:03

Accepted Name

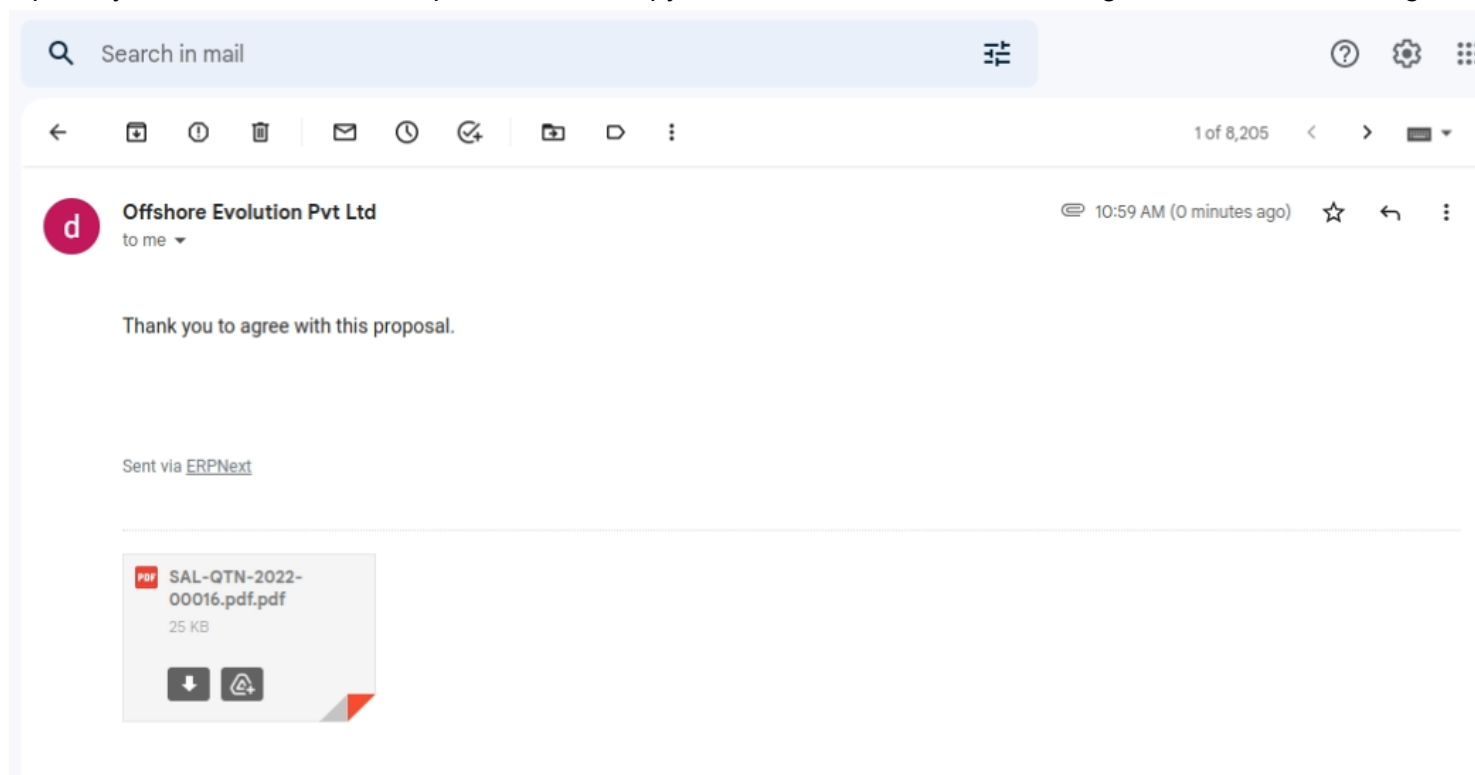
Dhruvin

Decline Date

Decline Reason

URL

On “Accept” - System will send a same quotation PDF copy to the customer and CC to configure emails in “Due Diligence” module.



7. On “Decline” - the system will ask the reason and it will be optional. ERP users can understand why customers decline the quotation and also update the “Due Diligence” record with Decline reason, Decline date and etc.

Reason

Submit

Due Diligence-00363

Assigned To: +

Attachments: Attach File +

Reviews: +

Shared With: +

Tags: Add a tag ...

You edited this just now

You created this 19 hours ago

Quotation Details

Quotation *
SAL-QTN-2022-00027

Diligence Status
Declined

Customer Name
Offshore Evolution Pvt Ltd

Email Details

Sender
Administrator

Sender Email
dhruvin.oep@gmail.com

Send To
bhaliyadhruvin8@gmail.com

Description

Acceptance and Decline Details

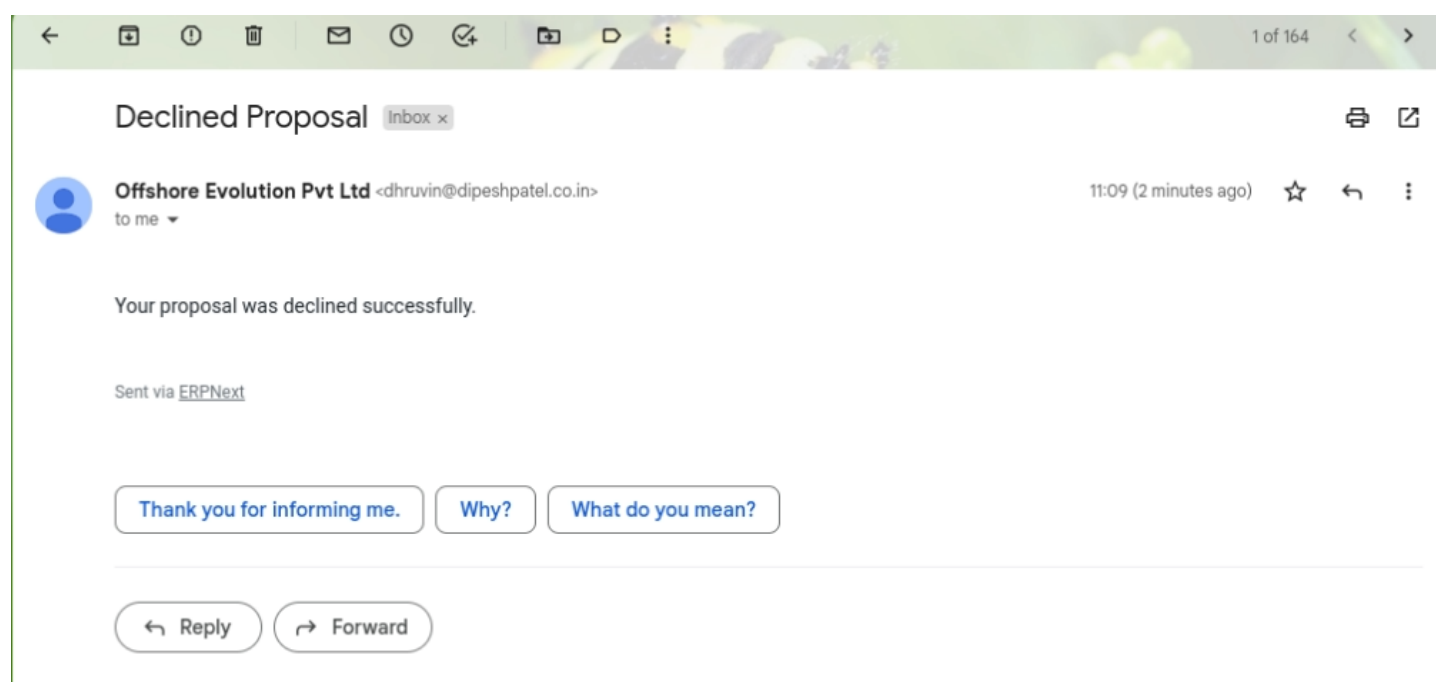
Accepted Date

Decline Date
01-11-2022 16:47:04

Accepted Name

Decline Reason
I am not interested.

On “Decline” - the system will send a notification to configure email IDs in the “Due Diligence” module.



How to set up the “Due Diligence” module?

ERPNext Guest User Permission :

After installing the Due Diligence app ERPNext User has to give permission to the guest User. For that, Go to the Role Permission Manager and select role type guest and select DocumentType Due Diligence and give permission for Read and Write and whatever you want to give.

To use the “Due Diligence” module, you must have permission below permission to the “Guest” user. Refer to the screenshot below.

Role Permissions Manager

Set User Permissions + Add A New Rule

Document Type	Role	Count	Permissions
Due Diligence	Guest	0	☐ Select ☒ Create ☒ Email ☒ Export ☐ Read ☐ Delete ☐ Report ☐ Set User Permissions ☒ Write ☒ Print ☐ Import ☒ Share
Language	Guest	0	☐ Select ☒ Email ☒ Export ☒ Read ☒ Report ☐ Set User Permissions ☒ Print ☐ Import ☒ Share

