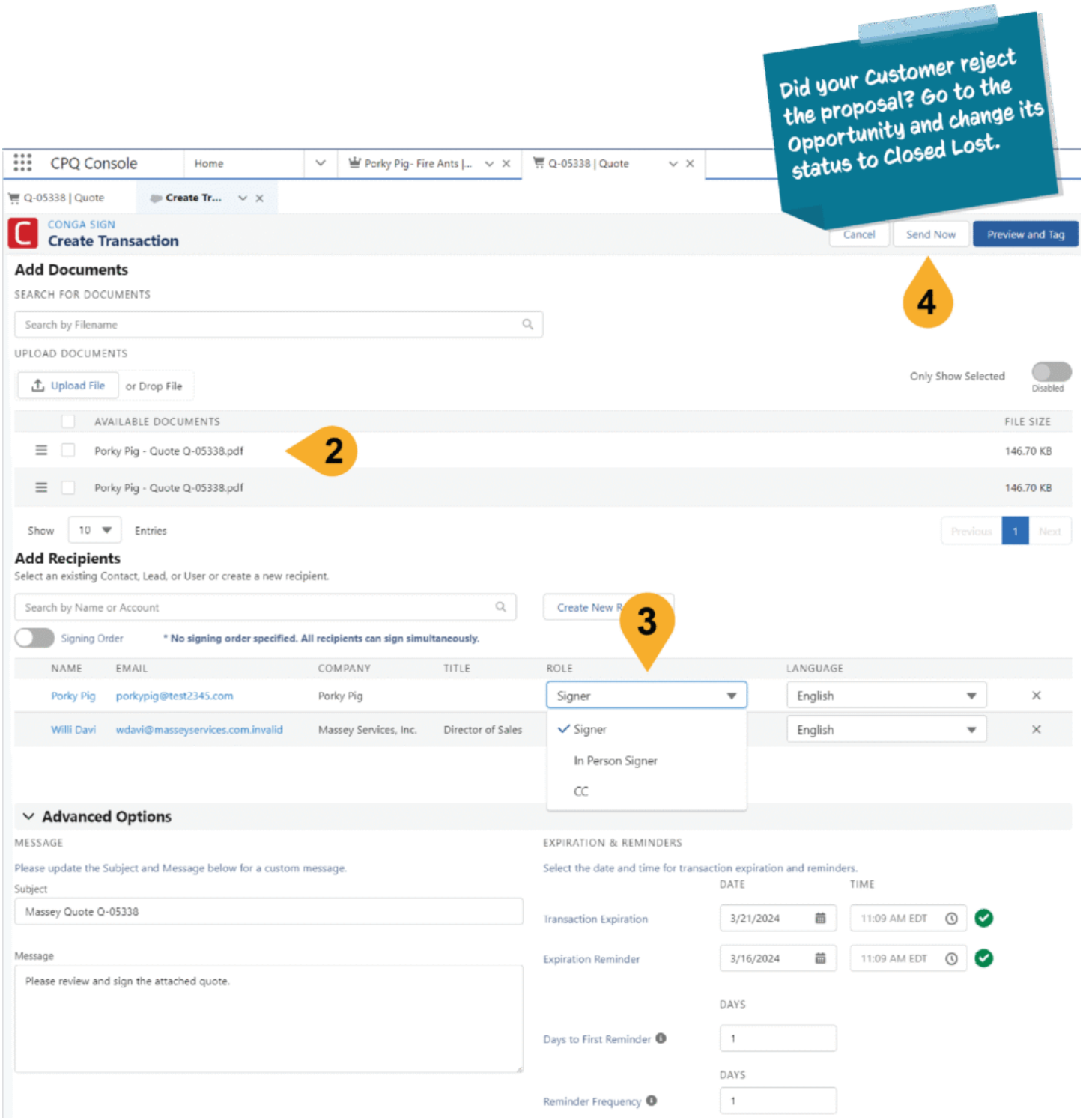
QRG QT.4 – Customer Signing

Quick Reference Guides · https://milo.masseyservices.com/docs/qrg-qt-4-customer-signing/

Send with Conga Sign

1. In the Quote, choose **Send with Conga Sign**.
2. In the new window make sure the Quote Proposal is attached to the quote.
3. Decide how to sign the agreement:
   - **Signer**: the agreement will be emailed for signing.
   - **In Person Signer**: the agreement will be signed right there using the Sales Inspector’s iPad.
   - **CC**: a copy of the agreement is sent, but no signature is required from the party.
4. Choose **Send Now/Begin Signing**.
5. Follow the prompts in the email/In Person Signing interface.
6. Once all signatures are gathered, the Quote is accepted and the Opportunity is Closed Won.



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