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.

Did your Customer reject the proposal? Go to the Opportunity and change its status to Closed Lost.

CONGA SIGN
Create Transaction

Cancel | Send Now | Preview and Tag

Add Documents

SEARCH FOR DOCUMENTS

Search by Filename

UPLOAD DOCUMENTS

Upload File | or Drop File

Only Show Selected | Disabled

	AVAILABLE DOCUMENTS	FILE SIZE
☰ ☐	Porky Pig - Quote Q-05338.pdf	146.70 KB
☰ ☐	Porky Pig - Quote Q-05338.pdf	146.70 KB

Show 10 ▼ Entries   Previous | 1 | Next

Add Recipients
Select an existing Contact, Lead, or User or create a new recipient.

Search by Name or Account   Create New R...

Signing Order   * No signing order specified. All recipients can sign simultaneously.

NAME	EMAIL	COMPANY	TITLE	ROLE		LANGUAGE	
Porky Pig	porkypig@test2345.com	Porky Pig		Signer ▼		English ▼	×
Willi Davi	wdavi@masseyservices.com.invalid	Massey Services, Inc.	Director of Sales			English ▼	×

✓ Signer

In Person Signer

CC