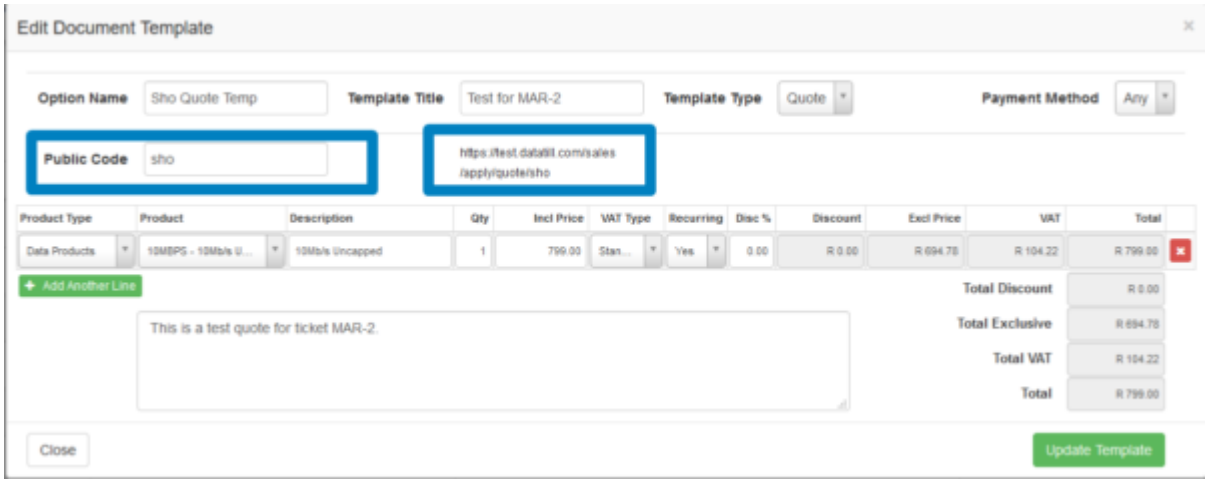
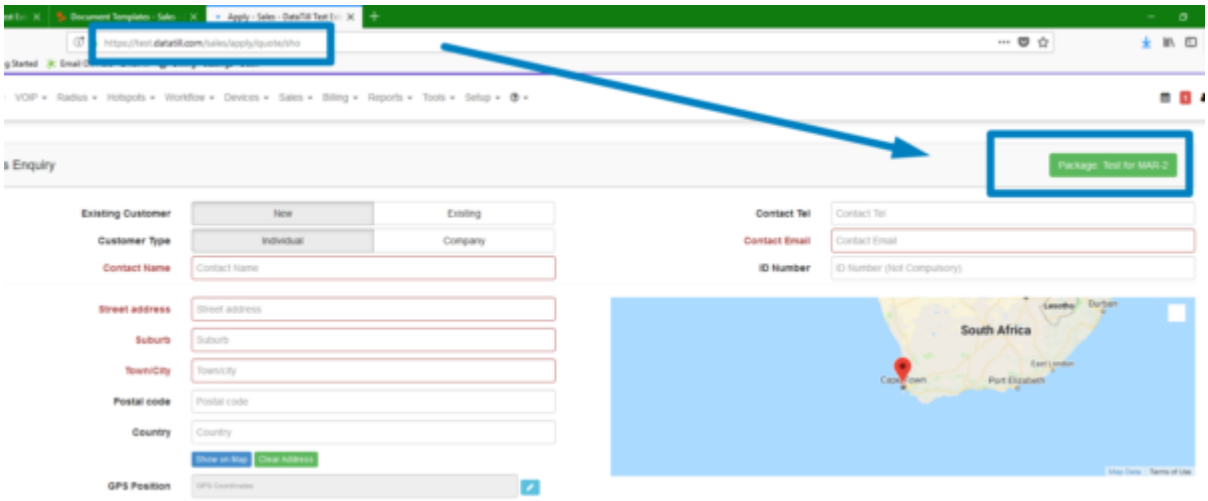
HeroTill has made some improvements to the Public Links for Quote Templates.

The Public Links can now be located by navigating to Sales > Sales Settings > Document Templates > Select to edit a Quote Template.

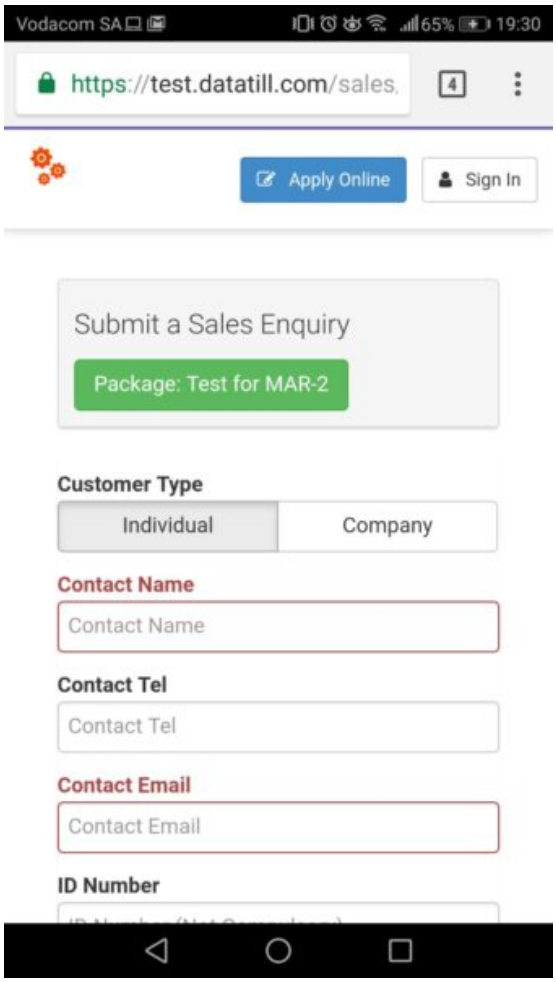
On the popup that appears of the Quote Template, the user can now add a Public Code specific to the Public Link. To the right of that field, the actual Public Link is displayed.



When a customer or potential customer navigates to the Public Link for the Quote, they will now see a label indicating the Package for the Quote.

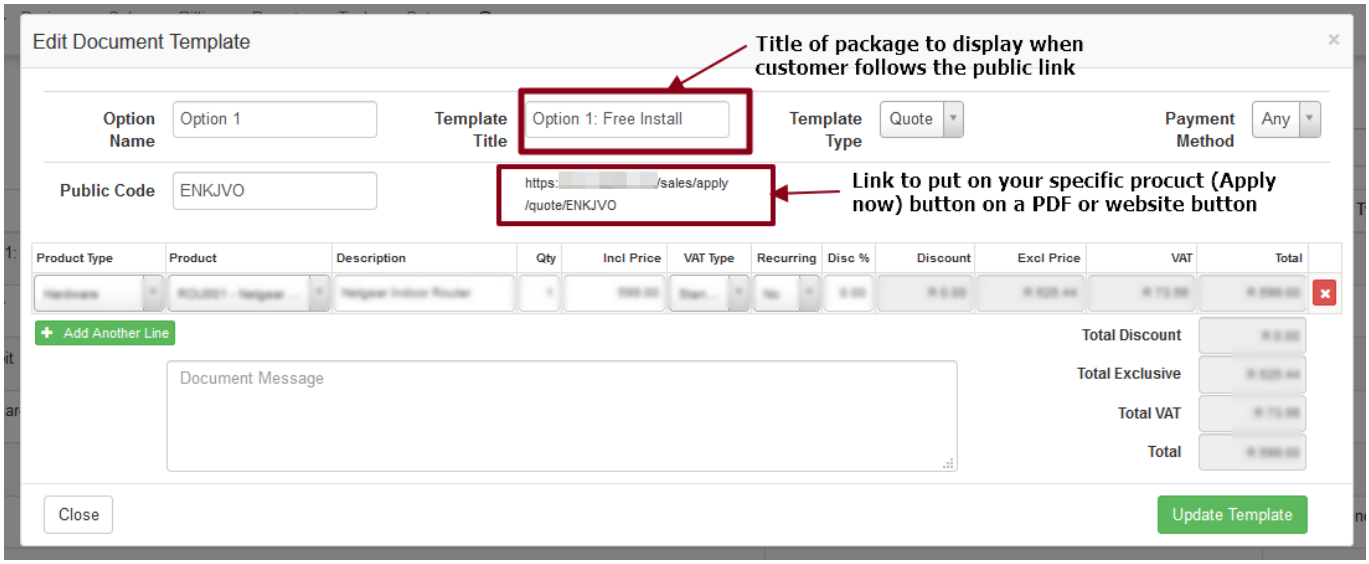


This link can also be shared and viewed on Mobile Devices.



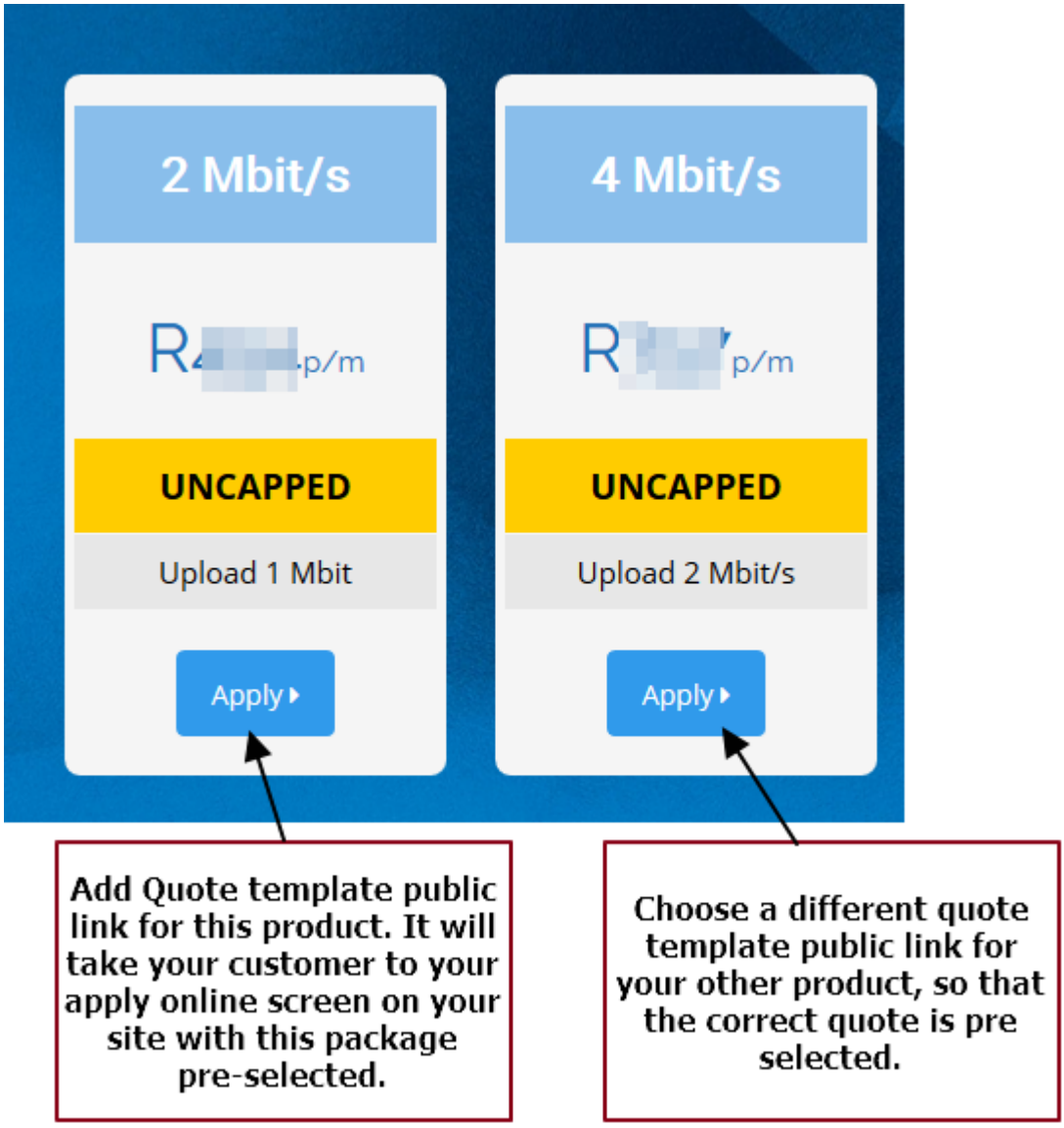
How to use public quote template links on your website or PDF “Apply Now” buttons :

Navigate to Sales > Sales Settings > Document Templates > Select to edit a Quote Template.

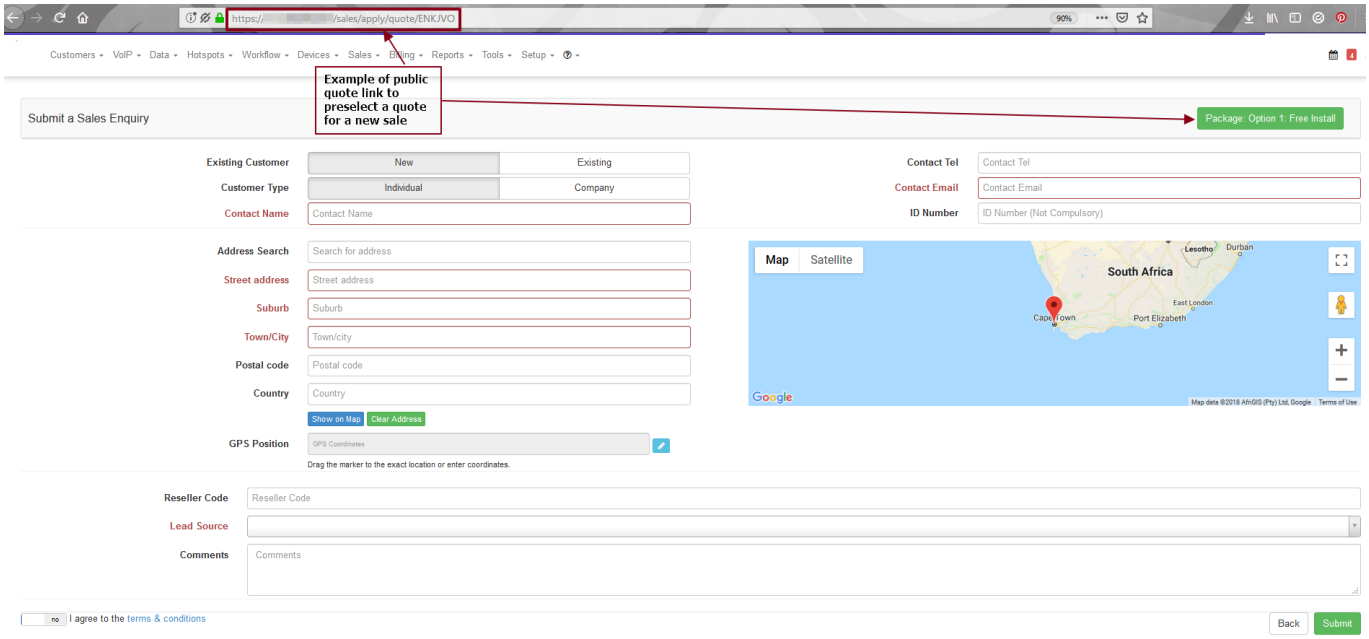


Use the quote public link for your “Apply” buttons on your website or PDF.

Various quote template links can be used on various packages so that the correct quote gets prefilled when the customer applies online:



After a customer clicked on one of your packages on website or PDF:


https://[redacted]/sales/apply/quote/ENKJVO
Example of public quote link to preselect a quote for a new sale
Submit a Sales Enquiry
Package: Option 1: Free Install
Existing Customer
New
Existing
Customer Type
Individual
Company
Contact Name
Contact Tel
Contact Email
ID Number
Address Search
Search for address
Street address
Suburb
Town/City
Postal code
Country
Show on Map
Clear Address
GPS Position
Drag the marker to the exact location or enter coordinates.
Map
Satellite
South Africa
Reseller Code
Lead Source
Comments
I agree to the terms & conditions
Back
Submit