

# Contract Bookings: How To Attach Quote and Set Customer Appointment



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Click here to review a new contract booking from customer

Create New Booking

DailyMonthlyYearly

0.00

New Customers

+0.00%

New Service Bookings (To authorize and send quote)

Contract booking

Type of Services:BC0391

Commercial Refrigeration Servicing (1 Unit)

No.	Date	Time Slot	Employee
JO1676			Not Assigned Yet
JO1675			Not Assigned Yet
JO1674			Not Assigned Yet
...			

Type of Services:BO0390

Aircon Maintenance (1 Unit)

No.	Date	Time Slot	Employee
JO1668	07/03/2024	12:00PM - 02:00PM	Not Assigned Yet

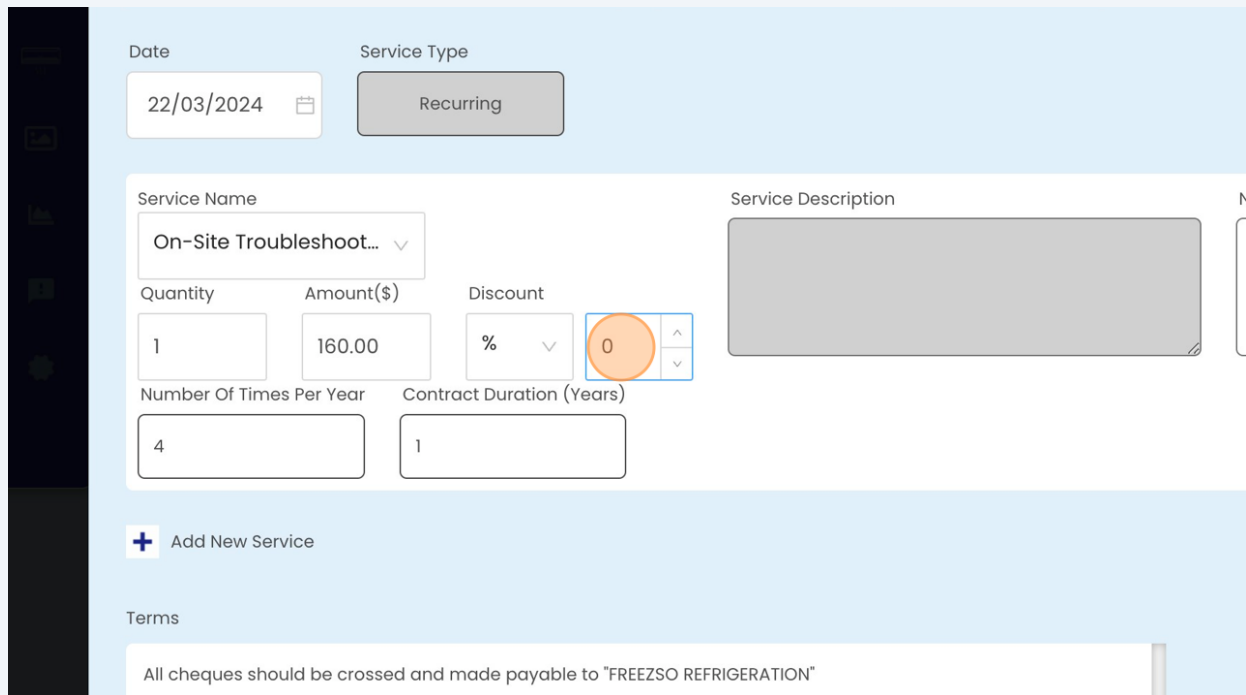
## 2 Click "Edit"

The screenshot shows a booking interface with a light blue background. At the bottom, there are two buttons: a dark blue button labeled "Edit" and a white button labeled "Cancel booking". The "Edit" button is highlighted with an orange circle.

## 3 Click "Attach Quote"

The screenshot shows a booking interface with a light blue background. At the top, there is a button labeled "+ Add Type of Service". Below this, there are two sections: "Designated Address" and "Billing Address". The "Designated Address" section contains the text: "Blk 88 Hougang Ave 8", "#03-00", "238900", and "Residential Type: Landed". The "Billing Address" section contains the text: "Blk 88 Hougang Ave 8", "#03-00", "238900", and "Residential Type: HDB". Below these sections, there is a text label "Promo Code Used: NA". At the bottom, there is a button labeled "Attach Quote" which is highlighted with an orange circle.

#### 4 Edit your discount amount from here



The screenshot shows a service configuration form. At the top, there is a 'Date' field with '22/03/2024' and a 'Service Type' dropdown set to 'Recurring'. Below this, the 'Service Name' is 'On-Site Troubleshoot...' and the 'Service Description' is empty. The 'Quantity' is '1' and the 'Amount(\$)' is '160.00'. The 'Discount' is set to '%' and the spinner is highlighted with an orange circle, showing '0'. The 'Number Of Times Per Year' is '4' and the 'Contract Duration (Years)' is '1'. At the bottom, there is a '+ Add New Service' button and a 'Terms' section with the text 'All cheques should be crossed and made payable to "FREEZSO REFRIGERATION"'. A dark sidebar is visible on the left.

Date	Service Type
22/03/2024	Recurring

Service Name	Service Description
On-Site Troubleshoot...	

Quantity	Amount(\$)	Discount
1	160.00	% 0

Number Of Times Per Year	Contract Duration (Years)
4	1

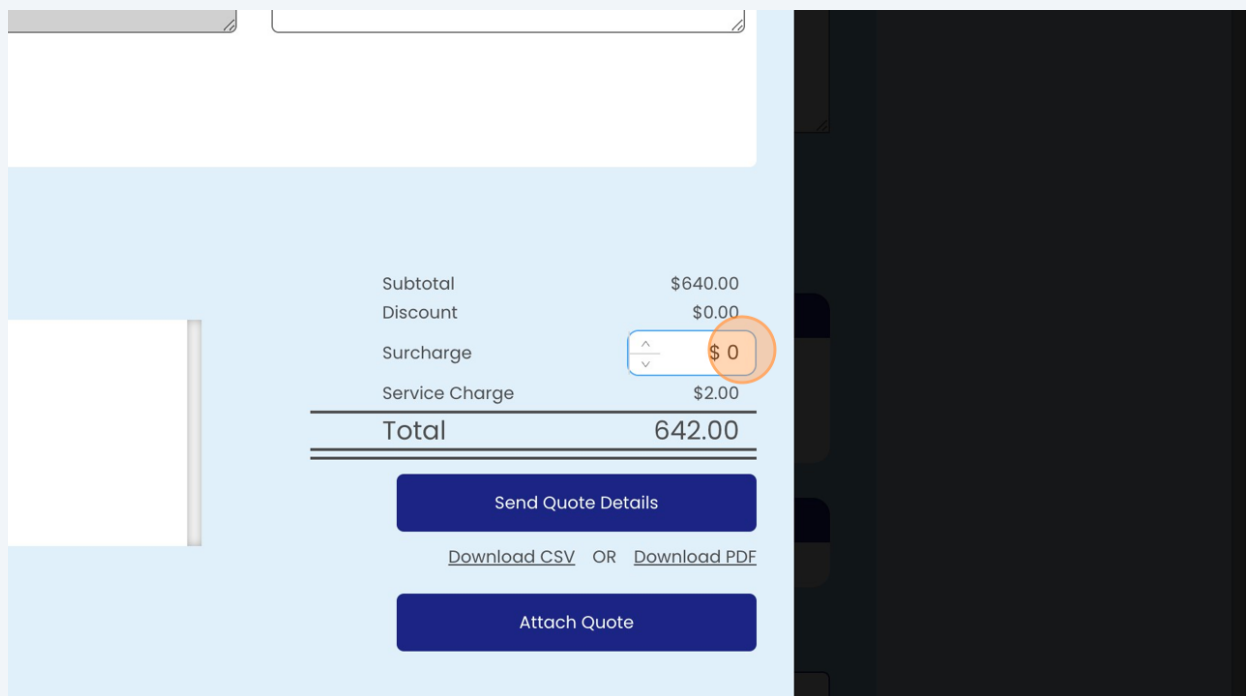
  

+ Add New Service

Terms

All cheques should be crossed and made payable to "FREEZSO REFRIGERATION"

#### 5 Edit your surcharge amount from here



The screenshot shows a quote summary. The 'Subtotal' is '\$640.00', 'Discount' is '\$0.00', 'Surcharge' is '\$0' (highlighted with an orange circle), and 'Service Charge' is '\$2.00'. The 'Total' is '\$642.00'. Below the summary, there are buttons for 'Send Quote Details', 'Download CSV', 'Download PDF', and 'Attach Quote'. A dark sidebar is visible on the right.

Subtotal	\$640.00
Discount	\$0.00
Surcharge	\$0
Service Charge	\$2.00
Total	642.00

Send Quote Details

[Download CSV](#) OR [Download PDF](#)

Attach Quote

## 6 Click attach quote to save and send quote to customer

SO REFRIGERATION"

valid for 30 days only.

eable.

Subtotal	\$320.00
Discount	\$0.00
Surcharge	\$ 0
Service Charge	\$2.00
<b>Total</b>	<b>322.00</b>

[Download CSV](#) OR [Download PDF](#)

[Send Quote Details](#)

[Attach Quote](#)

## 7 Click accept quote for customer if the customer does not use the app

Quote

Service Name	Service Description	Notes
Aircon Maintenance (1 Unit)	Our aircon maintenance and repair service is your trusted partner in keeping your air conditioning system running smoothly and efficiently. Our experienced technicians offer a comprehensive range of services, including routine maintenance to prevent issues before they arise and prompt repairs to address any unexpected problems. We conduct thorough inspections, clean air filters, check for refrigerant leaks, and ensure all components are in optimal condition during maintenance visits.	

[View Quote](#)

[Accept quote for customer](#)

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Click "Set Appointment for Customer" to assign slots for customer instead

Harvey ra  
04-00  
123389  
Residential Type: Commercial

Quote

Service Name	Service Description	Notes
On-Site Troubleshooting (1 Unit)	Most of the common refrigeration and air conditioning problems can apply to any type of system. Our technical experts are able help you troubleshoot any issues with your aircon at an affordable price!	

View Invoice

✔ Quote Approved

Set Appointment for Customer