

How do I use eSign?

First generate a proposal in JobPro exactly like you normally do. Please note that some screenshots may vary depending on customizations unique to your organization.

After confirming the PDF and any selected attachments, View the Reports History tab.

Click the Email/eSign link

Note: If you have not approved your account for eSign, you must agree to the terms and conditions before sending your first proposal for eSign.

Confirm the name and email address of your customer and select “Yes” from the “Send for eSign” drop down.

You may also enter a note that will be included in the email generated to the customer.

Click ‘Ok’.

You will receive a confirmation message.

Customer Proposal					
	Price	Total Price	Material Cost	Labor Cost	
40	4000.00	53600.00	29480.00	7370.00	
40		53600.00	29480.00	7370.00	

Documents	Related Bids	Reports History
3 Report(s) found		
Excel	Print	Refresh
ed	Pages	Remove
22:00 AM	1	X
Email Document		
Email/eSign		

Email Document [LEARN MORE](#)

To Name: JobPro Technology

Email: customer@jobprotech.com

Cc:

Bcc:

Subject: Proposal

Note:

Characters Remaining:1000

Send for eSign: Yes

Send Proposal as Attachment: No

Email Template: Standard eSign Email

Require Credit Card Payment: No Bid Total: \$25,257.90

Deposit: 30% or \$ 7,577.37

Ok Cancel

Save Save and Return Cancel Delete Bid

Email with eSignature Key sent to customer@jobprotech.com.

Your customer will receive an email from the email address on file for the authenticated user with a unique link to view and sign your proposal.

Notice that the email can be configured to your specifications. See below for information on changing the body of the email message.

Sent: Wed 5/27/2015 11:14 AM
To: support@jobprotech.com

Dear Builder ABC,

Your proposal is ready for your review and electronic signature.

[CLICK HERE](#) to review your proposal in a very safe and secure environment. Please execute and approve electronically with your signature, honoring our commitment to preserve paper and the environment when possible. We look forward to your reply.


Please call us if you have any questions. We appreciate your business, confidence, and loyalty.

If you are not the person identified above, please forward this to the correct individual for electronic signature.

Thank you,

Andrew Oliver

When your customer clicks the link in their email, they will be displayed a secure eSign page. The right part of the screen will be the exact proposal you generated in JobPro in PDF format, including any attachments. Note that the Adobe Acrobat plug-in is required for viewing proposals in Internet Explorer.

ESIGNATURE APPROVAL		An updated proposal with selected options and/or alternates will be emailed to you upon acceptance.	
Name	Bob Perkins	 <p>Date: 05/29/2015</p> <p>Customer: Bob Perkins Address: 121 Main Street, Charlotte, NC 28213-4 Contact: o: 704-555-5512 c: 704-555-5512 Bob Job Location: Bid # & Name: 146861 - test 9/18/2014 215</p> <p>Salesperson Contact: Andrew Oliver</p> <p>JobPro V2.0 Demo is pleased to provide you with a quotation based on the requirements determined at the site address listed above.</p> <p>WE PROPOSE TO SUPPLY ALL EQUIPMENT, LABOR AND MATERIALS TO THE FOLLOWING SPECIFICATIONS:</p> <p>Closed Cell Spray Foam Fiberglass Open Cell Spray Foam BAYER - 1/2 Pound, 5"</p> <p>Fee for above: \$6,554.00</p> <p>ADDITIONAL OPTIONS: (Check if Desired)</p> <p><input type="checkbox"/> Option 1 - \$2,500.00</p> <p>BAYER - 1/2 Pound, 3.5"</p>	
Bid	146861		
Base Bid Price	\$9,054.00		
Options <input type="checkbox"/> Option 1 (\$2,500.00)			
Approved Total	\$9,054.00		
<p>In an effort to preserve paper, ink, and conserve energy, we welcome you to approve and execute this contract electronically. Simply enter your full legal name below and click "Approve".</p> <p>Once you have clicked "Approve", you will receive an email confirmation stating your approval of this contract with our company including the contract date, any options, and contract amount.</p> <p>Thank you very much for your business.</p> <p>Full Name</p> <p>_____ type your full name here and click Approve</p> <p><input type="button" value="Approve"/></p> <p><small>*As an alternative method to approve this proposal, click HERE and print your approved proposal for signature and return to us.</small></p>			

The customer may “check” any options they wish to approve of your proposal. The Approved Total will automatically update as options are selected.

Base Bid Price	\$9,054.00
Options	
<input checked="" type="checkbox"/>	Option 1 (\$2,500.00)
Approved Total	\$11,554.00

The customer must enter their full legal name and click “Approve” to approve the proposal.

Full Name
<input type="text"/>
Type your full name here and click Approve
<input type="button" value="✓ Approve"/>

Both the sales person for the bid in JobPro and the customer will receive an email stating the proposal was approved. The email will include the contract generation date, signature date and time, approved amount, and the default receipt email text you insert.

Daniel [REDACTED]

This automated email is to confirm that we have received your acceptance of the contract described below:

Bid #: 26151
 Contract Dated: May 24 2011 9:32AM (EST)
 Contract Signed: May 24 2011 9:36AM (EST)
 Signer Key: EFB05198-1F73-47E0-A2A4-E704534DB731

Approved Amount: \$7,681.47

Thank you,

Robin [REDACTED]
 JobPro V2.0 Demo

See below for information on changing the body of the email message.

If you wish to cancel a proposal that you previously sent for eSign, return to the Reports History tab and click the “Remove” link. The customer will no longer be able to eSign this document.

Remove ^(a)	Email Document ^(a)	Last Emailed To ^(a)	eSignature Status ^(a)
<input checked="" type="checkbox"/>	Email/eSign		Sent on 07/11/2011


Note that the eSign Status is also displayed on this tab which indicates if a proposal has been sent for eSign, and if the customer has approved the proposal.

You may configure the middle body of the email that the customer will receive, and the middle body of the receipt email the customer receives after acceptance. You’re also able to default one additional email to copy on the acceptance receipt.

eSign Email Text^(a)
<p>Here is the proposal for your job site. Please review and if any questions arise please contact us via email or by phone.</p> <p>When you are ready to approve, simply sign your name and hit submit. You'll receive a receipt, and we will contact you shortly about scheduling.</p> <p>Thank You.</p>

This is controlled using the Settings-Configure System Settings menu option. View and edit the System Defaults tab.

*If you need assistance with using this new eSign feature, contact us at:
support@jobprotech.com

eSign Receipt Email Text 

Thank you for signing the proposal.

We will contact you shortly to set up a schedule.

Thanks,

Additional Email for eSign Receipt 

anotherEmail@gmail.com