SpeedQuote: the sales guide

How to build a quote, send it, get it signed, hand it over as a contract, and change that contract later by addendum. It covers what to send the customer at each stage, what happens behind the scenes, and what to do when something doesn't look right.

Sales team · SpeedQuote V75.5 · Screenshots use made-up customers

1 The journey at a glance

Every order goes through the same stages. SpeedQuote tracks each one for you, and the quote always shows where it is and what the next step is.

STEP 1
Build the quote
Customer, seats, term, products. Save it.
You

STEP 2 · ONLY IF NEEDED
Pricing approval
Only when the margin is below the company floor.
Manager

STEP 3
Send the proposal
Email it or copy the link. An opportunity opens in Pipeline.
You

STEP 4
Customer reviews
Opens the link, ticks any options, reads the MSA.
Customer

STEP 5
Customer signs
One signature covers the order and the MSA. You get an alert.
Customer

STEP 6
Won & locked
The deal closes as won. The quote is locked for good.
Automatic

STEP 7
Into the Contract Manager
Existing or new customer? The contract is created.
Manager*

LATER
Changes by addendum
Draft it, send it, the customer signs online, it takes effect.
You · Customer

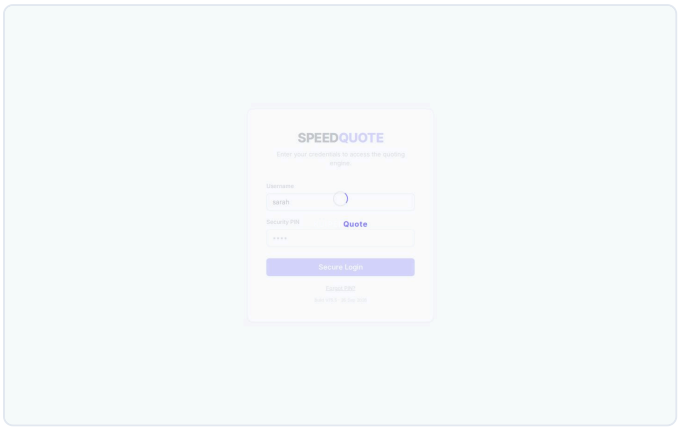
* By default only Managers can add a signed order to the Contract Manager. If your permission group allows it, you can do it yourself. See section 9.

Three rules that are never broken

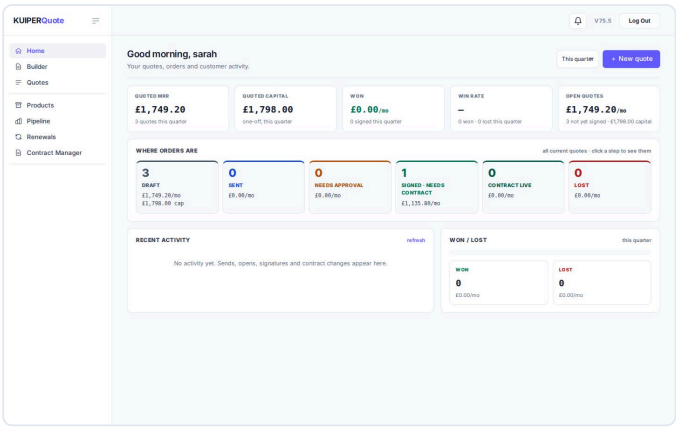
- **A signed order is final.** Once the customer signs, the prices, lines and terms can't change. Changes go through an **addendum** on the contract, or a new quote.
- **Customers never see cost prices on the web link.** The proposal link only carries customer prices, however you built the quote. Printed and PDF documents are different: see section 5 for the two things that must never go to a customer.
- **Send the link only when you're happy for them to sign it.** The link is live: the customer can sign as soon as they open it. (A quote waiting for pricing approval can't be opened, sent or exported at all.)

2 Signing in and finding your way

Sign in with your username and PIN. The build number under the sign-in box and in the top-right corner tells you which version you're on.



The sign-in screen. The small "Build" line at the bottom is the version.



After signing in you land on **Home**. The left bar takes you everywhere else.

LEFT BAR	WHAT IT'S FOR
Home	Your numbers this month, quarter or year, where your orders are, won/lost, and recent activity.
Builder	Build and price a quote. **+ New quote** starts a blank one; **Open quote** finds an existing one (both in the top bar while you are in the builder).
Quotes	Every quote you own, where each one is, and the next action. Managers see everyone's.
Products	The catalogue (read-only for Sales).
Pipeline	Your deals by stage, plus Won/Lost with loss reasons.
Renewals	Signed contracts coming up for renewal.
Contract Manager	The register of live contracts, each contract file, and addenda.

In the top bar: the 🔔 **bell** (customer activity, see section 7), the build number and **Log Out**.

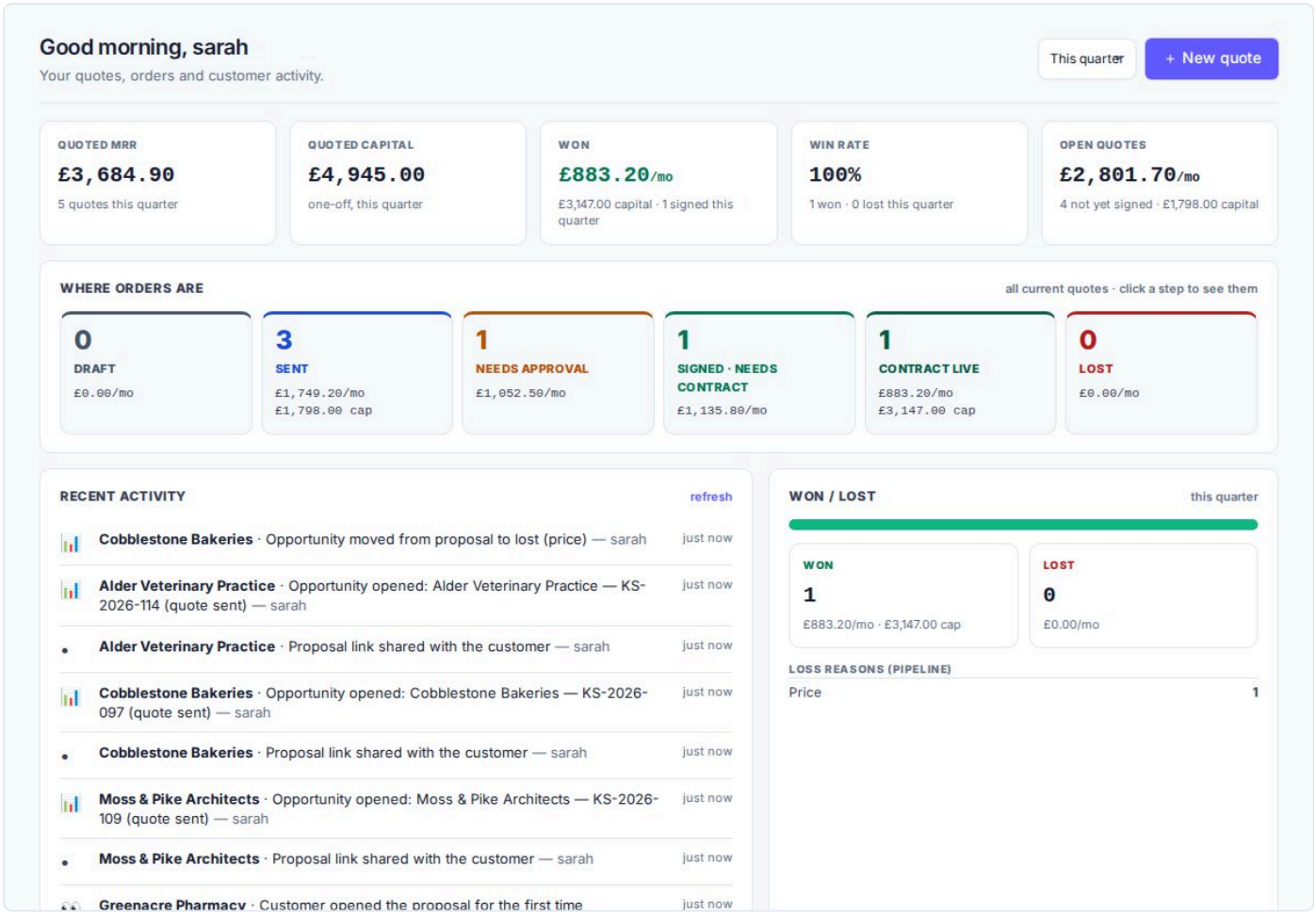
Light or dark. Appearance at the bottom of the left bar switches SpeedQuote between **Light**, **Dark** and **Match system** (follows your computer's setting). It is remembered on that computer. Proposals, contracts and PDFs always stay white, and customers always see the light version.

What you can see

With the **Sales** role you see **your own** quotes, deals and contracts: the ones you wrote or that are assigned to you. Managers see everything. The server applies this rule, so it isn't just hidden on screen. Depending on your permission group, cost and margin columns may also be hidden in the builder.

3 Home

A one-screen view of your business. Use the period menu (top right) to switch between this month, this quarter, this year and all time.

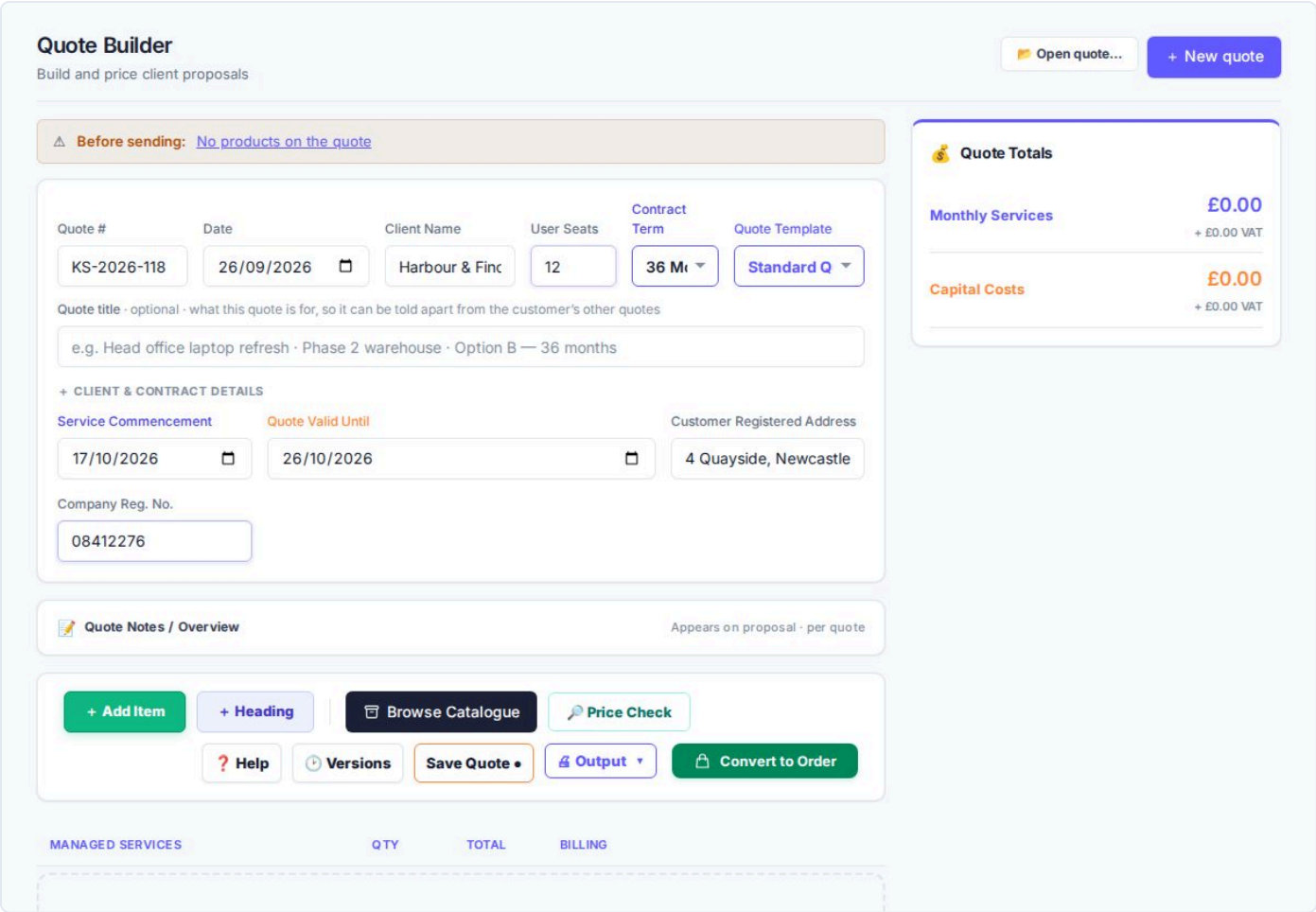


Home for a sales user part-way through a quarter.

- **Quoted MRR / Quoted capital**: the monthly and one-off value of quotes created in the period.
- **Won**: what was signed in the period. **Win rate**: won ÷ (won + lost). **Open quotes**: everything not yet signed.
- **Where orders are**: how many quotes are at each stage (Draft → Sent → Needs approval → Signed · needs contract → Contract live → Lost). **Click a stage** to open Quotes filtered to it.
- **Recent activity**: sends, customer opens, signatures, deals moving and contract changes, newest first.
- **Won / lost**: counts and values, with loss reasons from the Pipeline.

4 Building a quote

Start with **+ New quote** (on Home, Builder or Quotes). It clears the builder without reloading the page.



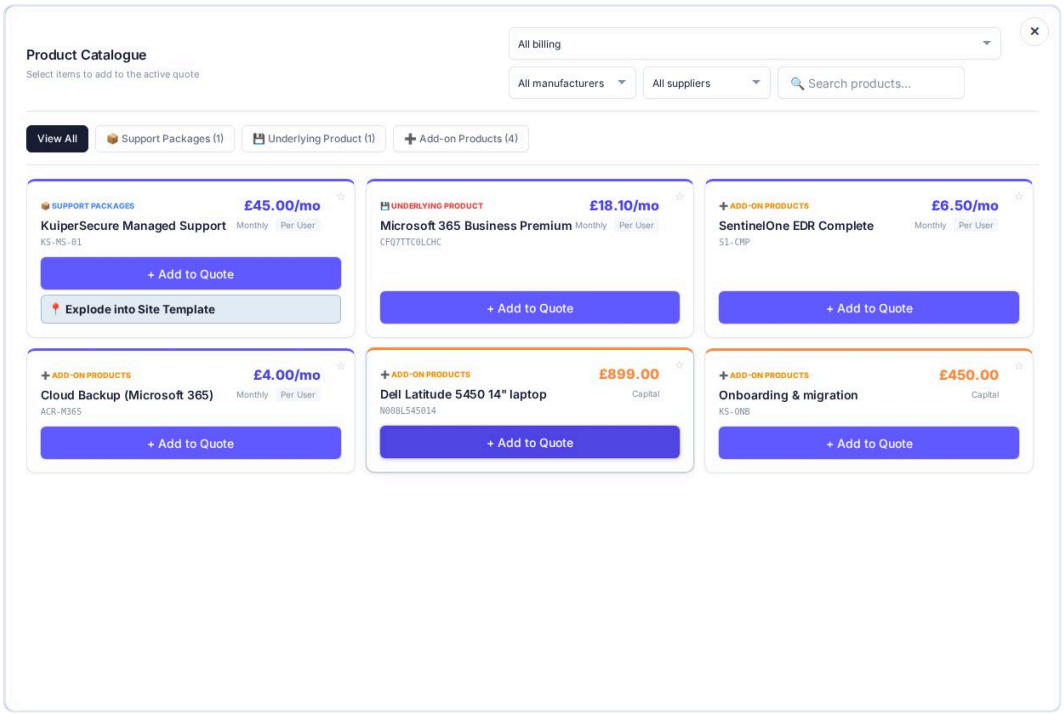
The top of the builder. The amber bar lists anything that must be fixed before the quote can be sent.

The header

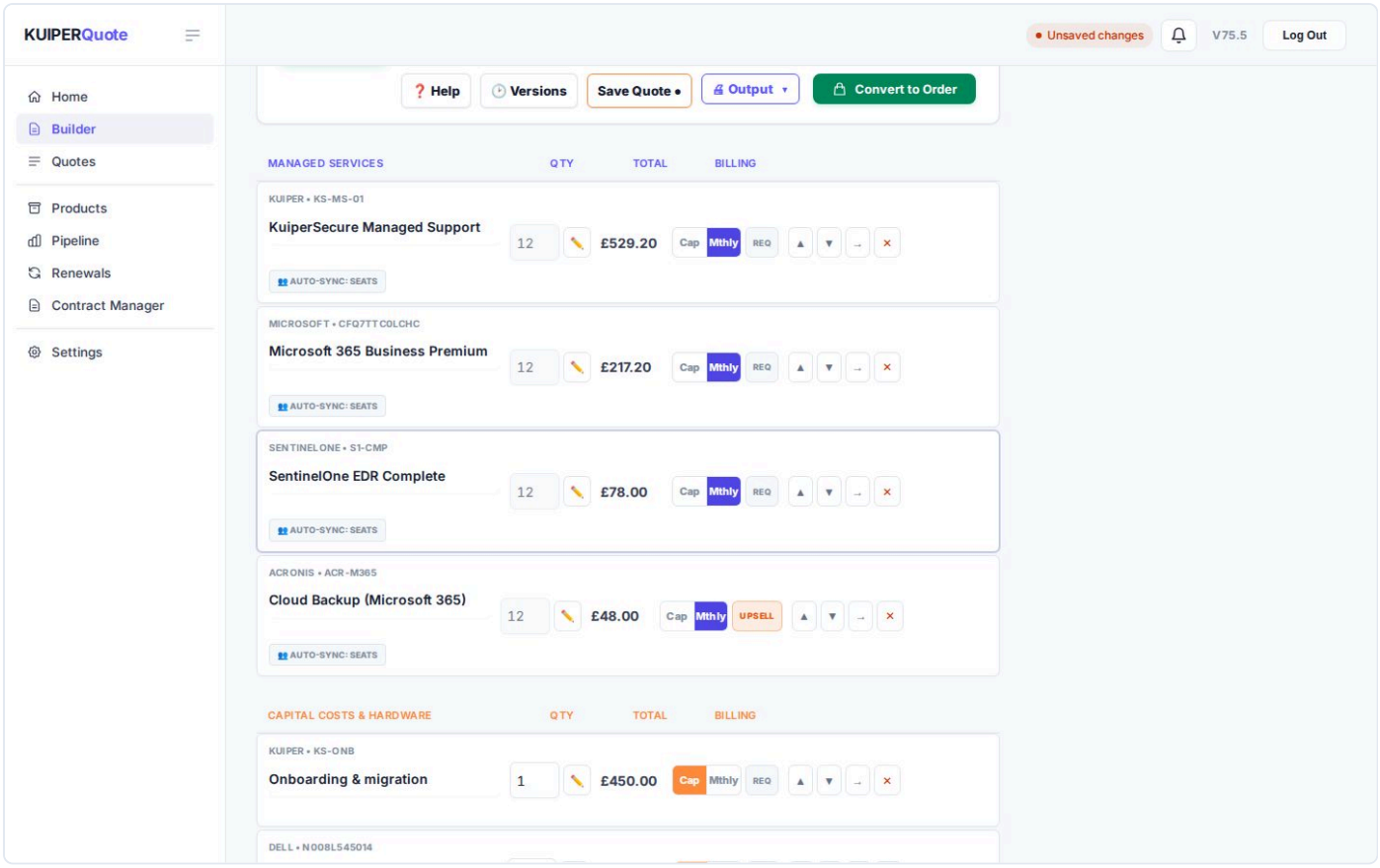
FIELD	WHAT TO PUT IN IT
Quote (top bar)	The quote number, e.g. `KS-2026-118`. Leave it blank and one is assigned when you first save. It must be unique: saving with an existing number saves over that quote. The quote **Date** sits next to it.
Client Name	The customer's company name as it should appear on the contract.
Seats	Number of users. Per-user products (marked **AUTO-SYNC: SEATS**) follow this number automatically.
Contract Term	12–60 months. Longer terms apply the automatic term discount to support packages.
Quote title (optional)	Tells this quote apart from the customer's other quotes, e.g. "Head office laptop refresh".
Details	**Service Commencement** (the contract start), **Quote Valid Until** (after this the quote shows as expired), **Registered Address** and **Company Reg. No.**. The address and company number go into the MSA, so fill them in for managed-service orders.
Notes	A covering note that appears on the proposal, like the body of an email. A dot on **Details** or **Notes** means something is filled in.

Adding products

Catalogue opens the product catalogue as a list. Type in the one search box (it matches name, part code, manufacturer and supplier), or use the chips: ★ **Favourites**, 🕑 **Recent** and the categories. Set the **Qty** on a row and click **Add**; the catalogue stays open so you can add several, a tray at the bottom lists what you added, and rows already on the quote say ✓ **on quote**. Keyboard: ↑ ↓ to move, Enter to add, Esc to close. Click ☆ to make a product a favourite. If nothing matches, **Search distributors** runs a Price check for what you typed. **Custom item** adds a blank line you type yourself; **Heading** adds a section heading. **Price check** compares live distributor cost and stock for a part code (where distributor accounts are connected).



The catalogue. Monthly items show a /mo price; capital items show a one-off price.



Lines are split into **Managed Services** (monthly) and **Capital Costs & Hardware** (one-off).

The controls on each line

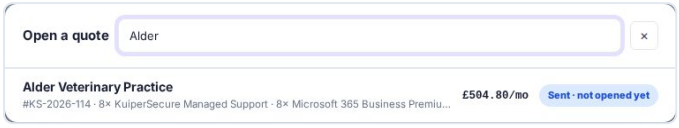
CONTROL	WHAT IT DOES
Qty and ✏️	Quantity. A greyed-out quantity is synced to the seat count. Click ✏️ to unlink it and type your own.
Cap / Mthly	Bill the line as a one-off (capital) or monthly.
REQ / REC / UPSELL / UPGRADE	Click to cycle: • **REQ**: part of the order. • **REC** (recommended): pre-ticked and included in the customer's total; they can untick it. • **UPSELL** (add-on): not included; the customer can tick it when they sign. • **UPGRADE**: an alternative to another line.
▲ ▼ → ×	Move the line up or down, group it under the heading above (→), or remove it.

The **Quote Totals** panel on the right shows the monthly and capital totals (with VAT). If your permission group can see costs, you also get cost, sell and profit columns and the term margin.

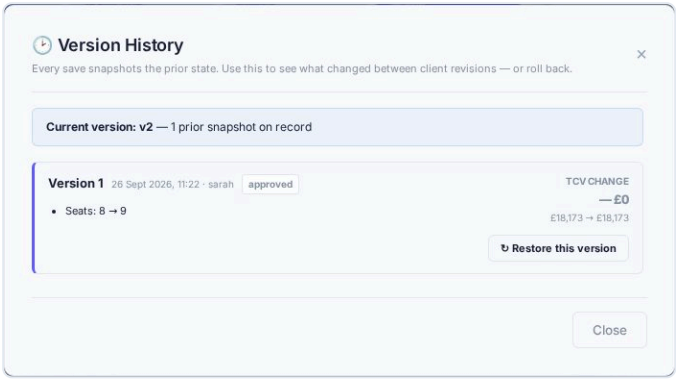
Saving, versions and reopening

- **Save Quote** (or `Ctrl` + `S`) saves it. "Unsaved changes" in the top bar means you haven't saved yet.

- **"Draft autosaved" does not mean your quote is saved.** It refers to the app's background settings save. Only **Save Quote** saves the quote, so always save before you leave the builder or send anything.
- Every save keeps the previous version. **Versions** shows what changed between versions and lets you restore one.
- **Open quote** searches your quotes by customer, number or title and opens one in the builder.



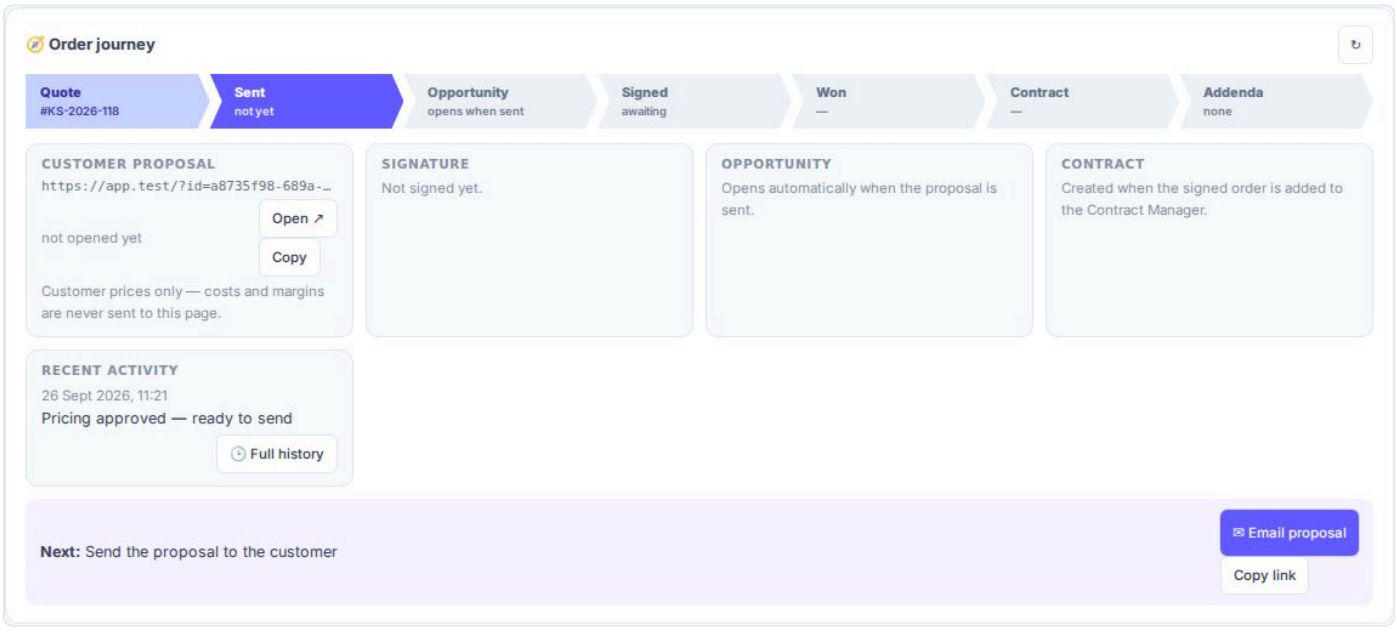
Open quote: type part of the customer name or number.



Version history: each save records what changed.

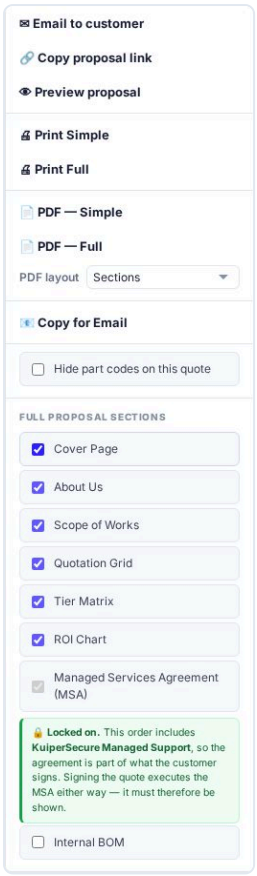
5 Sending the proposal: what to send, and when

Once the quote is saved, the **Order journey** panel at the top of the builder shows its stages and the next step. **Details ▾** opens the proposal link, signature and MSA, opportunity, contract and recent activity.



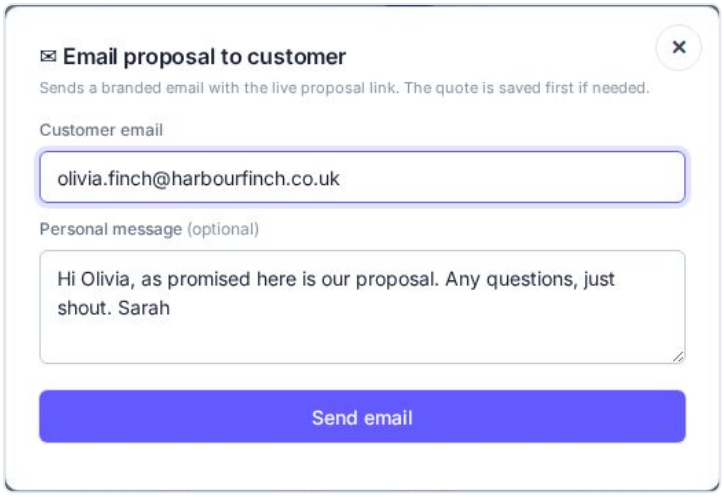
A saved quote that hasn't been sent yet. Next step: send the proposal.

The Output menu



Output: every way to send or print the quote.

OPTION	USE IT FOR
✉ Email to customer	Emails the live proposal link from SpeedQuote with your message. **Marks the quote as sent.**
🔗 Copy proposal link	Copies the live link to paste into your own email or Teams.
👁 Preview proposal	Opens the customer's page so you can check it before sending.
Print / PDF, Simple or Full	A document the customer **can't sign online**. Simple is the price table; Full adds the cover, about us, scope and so on. Print opens your browser's print dialog (A4).
PDF layout	How PDF Simple / PDF Full are laid out, remembered for next time: • **Sections** (the default): each section is its own page. Cover, About us and so on are A4; a long quote grid gets one longer page so it's never split. Clear page breaks, reads in sections on screen. • **One continuous page**: the whole document on one long page. • **A4 pages**: standard A4 sheets for printing on paper.
📧 Copy for Email	Pastes the quote as a formatted table into an email.
Hide part codes	Removes manufacturer part codes from this quote's outputs.



Email to customer: the customer gets a branded email with the link. The quote is saved first if needed.

What to send at each stage of the sale

WHERE YOU ARE	SEND	WHY
Early conversation / budget figures	PDF **Simple**, or **Copy for Email**	Gives prices without anything they can sign. Nothing is marked as sent and no opportunity opens.
A formal proposal you're happy to be held to	**Email to customer** (or **Copy proposal link** then send it yourself)	The live link: they can see options, read the MSA and sign. This opens the opportunity in Pipeline.
Board pack / procurement wants a document	PDF **Full** *and* the live link	The PDF for circulation; the link for signature.
After they've signed	Nothing more to send for the order.	They can reopen the same link at any time to see and print what they signed.
A change to a live contract	The **variation link** from the addendum (section 10)	Never re-quote a signed order to change it.
The customer asks for a copy of their current agreement	📄 **Review MSA** → **PDF** from the contract file	One document: what's in force now, the MSA as signed and every signed variation. Unsigned changes aren't included.

The link is always the latest saved version

If you edit and save the quote after sending, the customer sees the new version next time they open the same link. They don't need a new link. Every save is kept in **Versions**, so you can see what they were sent. Tell the customer when you've changed something.

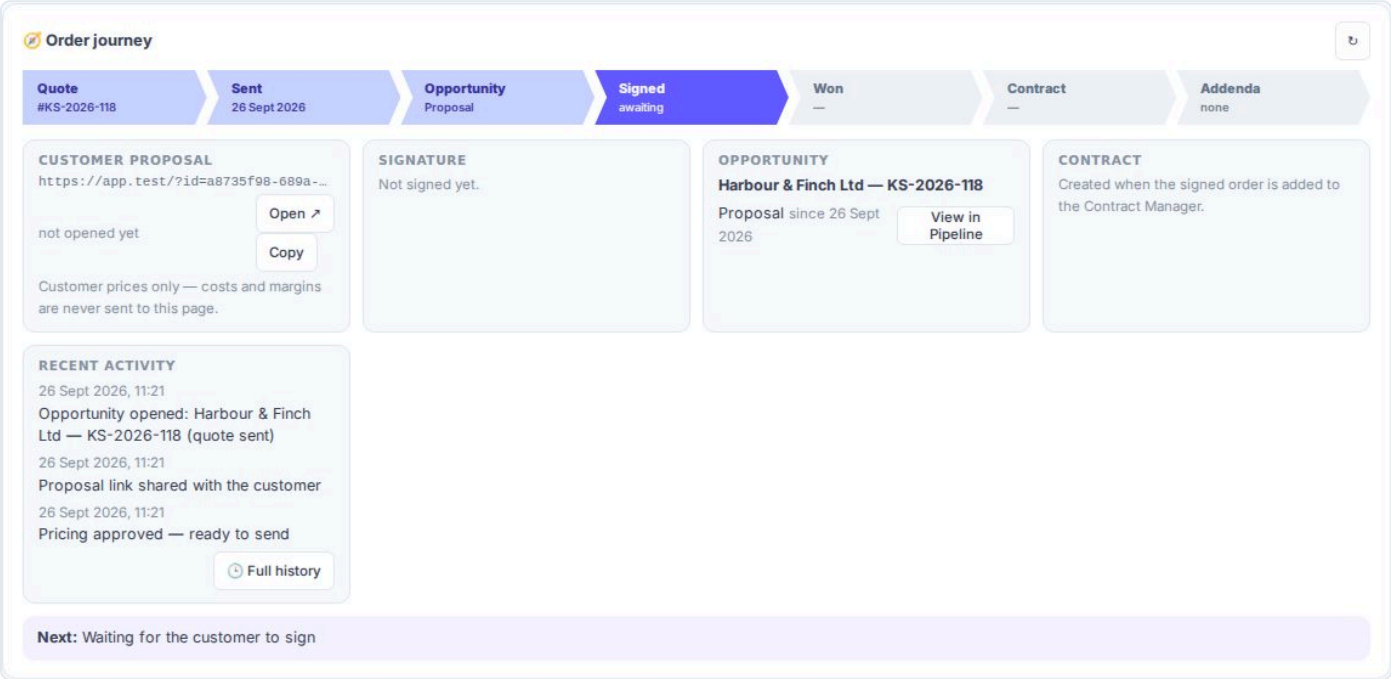
Never send these to a customer

- **Convert to Order**: an **internal** handover PDF for the office, with margin breakdown and procurement BOM (costs included).
- A **Print/PDF Full** with **"Internal BOM"** ticked under *Full proposal sections*: it adds buy prices and profit. It's off by default; leave it off for anything that leaves the building.

The web proposal link never includes costs, whatever is ticked.

What happens when you send

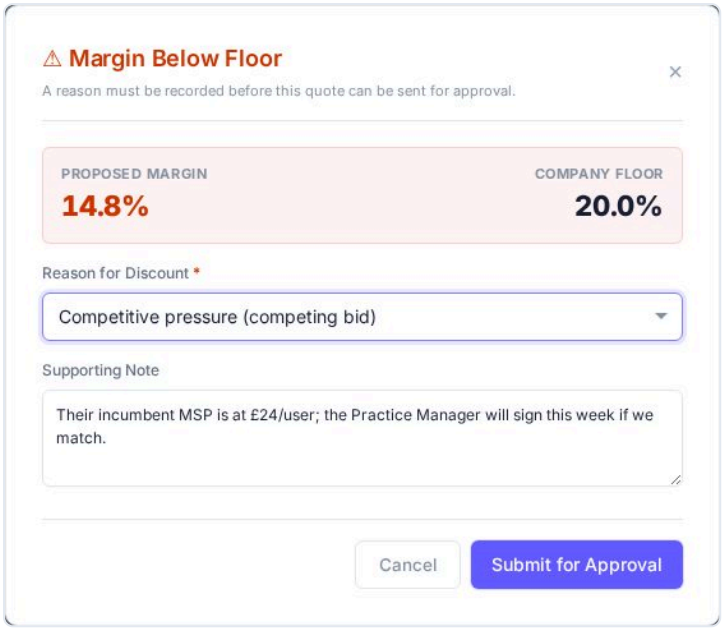
Emailing or copying the link marks the quote as **Sent** and opens an **opportunity** in the Pipeline at the *Proposal sent* stage. The journey panel updates:



Sent: the opportunity is open and the next step is "Waiting for the customer to sign".

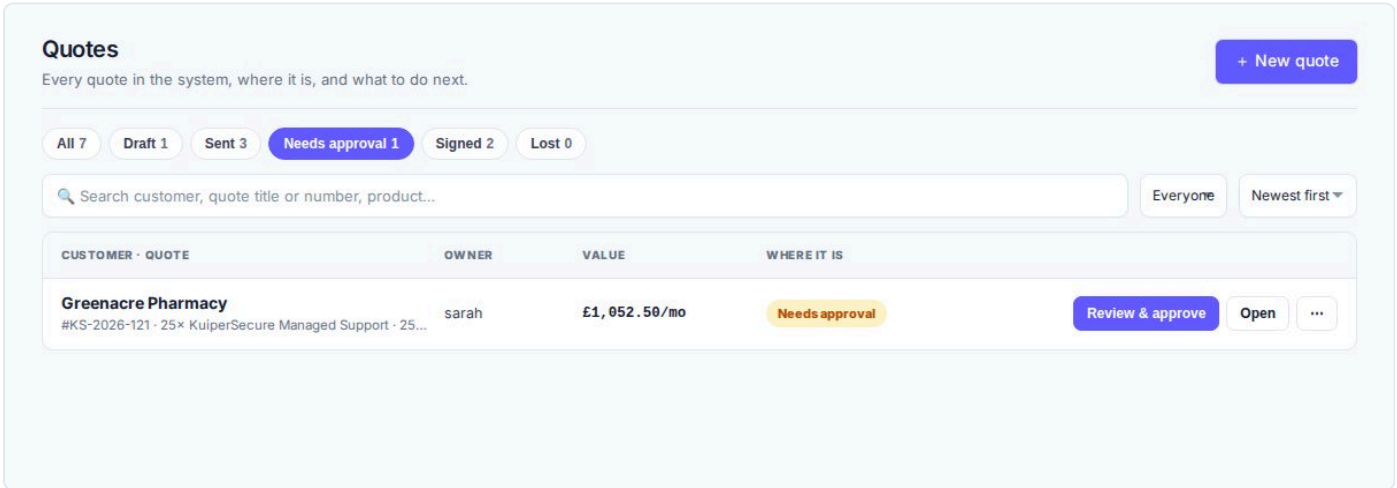
6 Pricing approval (margin floor)

If a quote's margin is below the company floor, saving it asks for a reason. The quote then waits for a Manager to approve it.



Choose the reason and add a note a Manager can act on (who you're competing with, when they'll sign).

1. Save the quote. If it's below the floor you're asked for a **reason** and a **note**. Click **Submit for Approval**.
2. The quote shows **Needs approval**, and Managers see it under **Quotes → Needs approval**. An email alert goes to the company's alerts address (if email is set up). Special-bid costs on a line need approval the same way.
3. Until it's approved, a banner above your quote lines says **Awaiting Manager approval**, and the 🔒 **Output** menu is locked: no PDFs, printing, Copy for Email, proposal link, emailing or Convert to Order. The customer's link shows **"Proposal not quite ready"**, with no prices, and can't be signed.
4. A Manager approves or declines it, from the banner on the quote or from Quotes. Once approved, the banner turns green, **Output unlocks**, and the same link opens and can be signed. If declined, the banner shows the Manager's reason: revise the pricing and save to resubmit.
5. The approval covers the margin that was approved. Change other things freely, but if you **lower the margin further**, Output locks again and saving asks for a new approval.



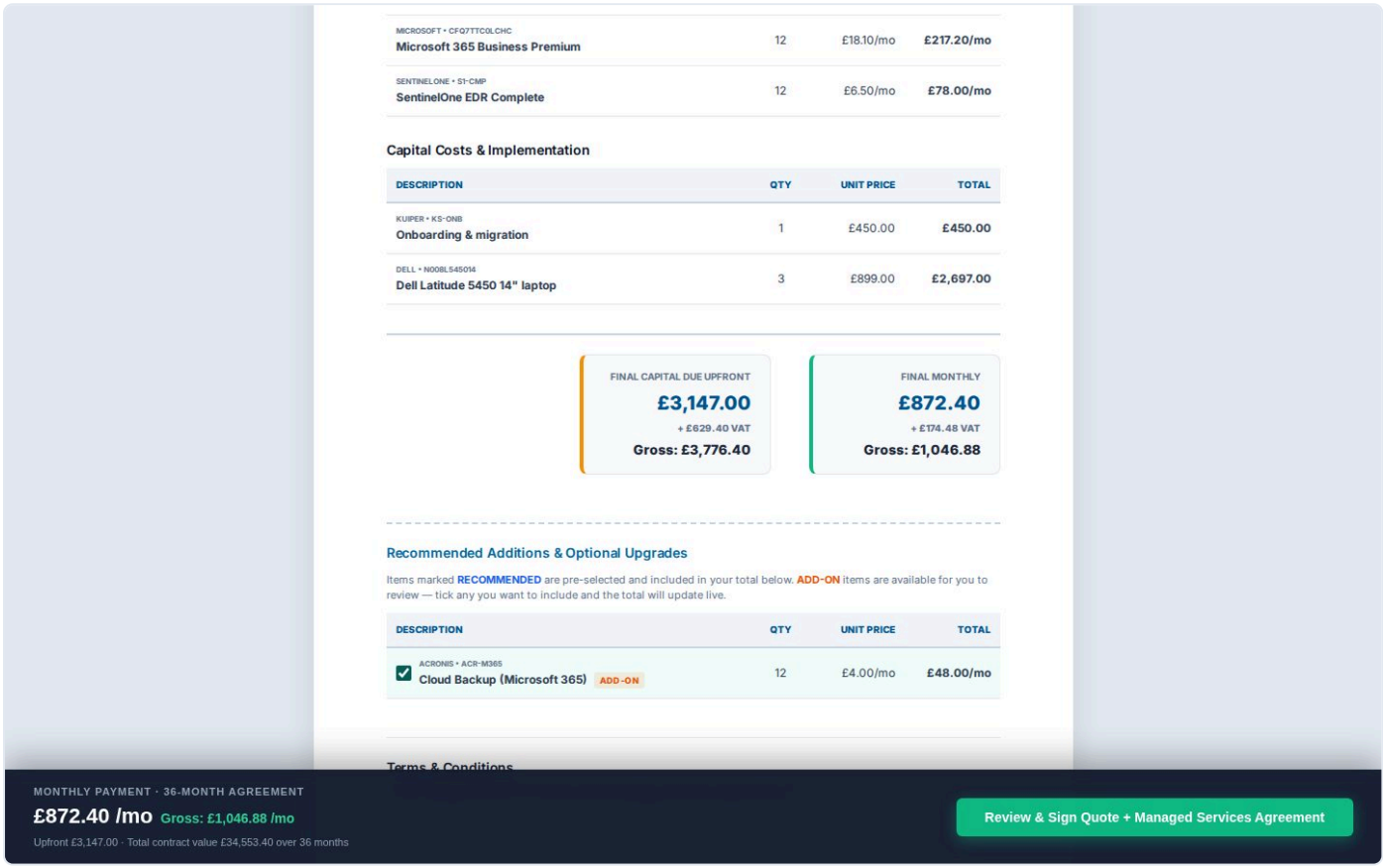
The Manager's view: **Review & approve**. (The ⋯ menu also has Approve and Decline.)

7 What the customer sees and does

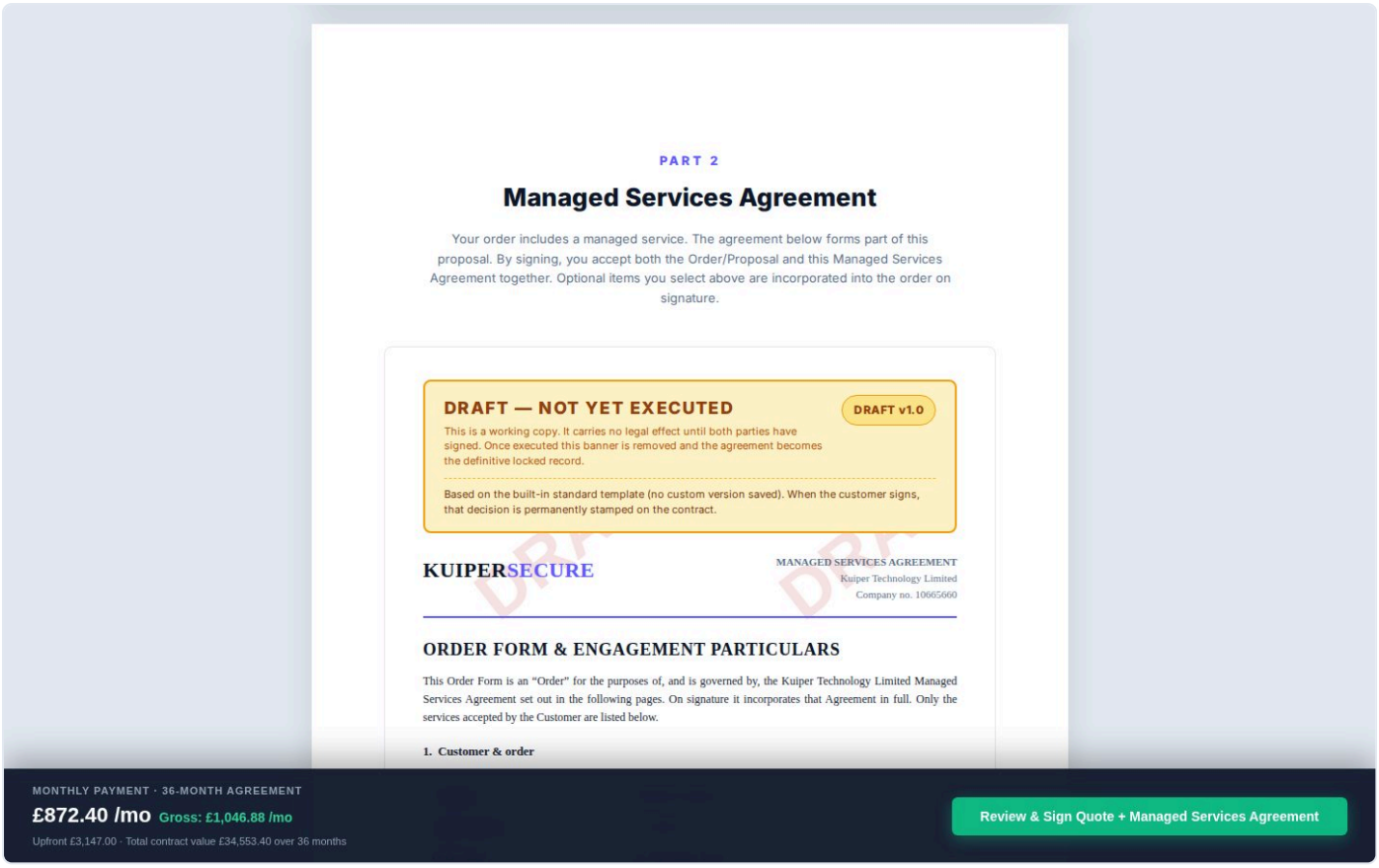
The customer's page is branded, shows only customer prices, and carries a bar at the bottom with the monthly and upfront totals and the signing button.



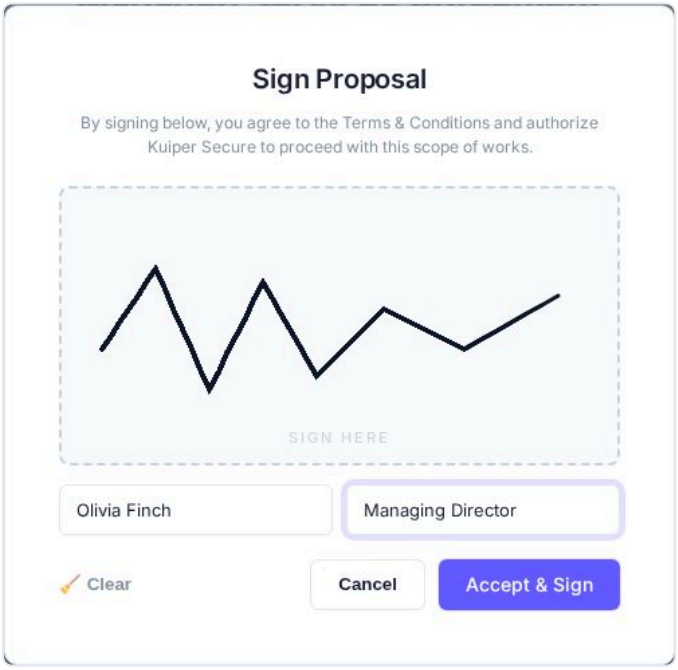
The top of the customer's proposal.



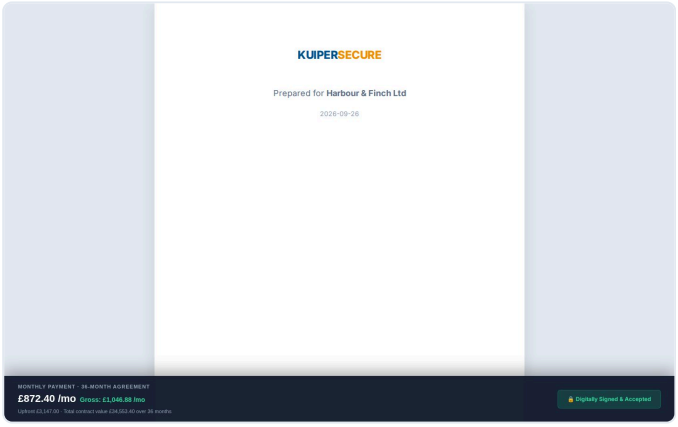
Optional items: the customer ticks what they want and the totals update. Ticked options become part of the order when they sign, and you're told which ones they picked.



If the order includes a managed service, the **Managed Services Agreement** follows as "Part 2", and the button reads "Review & Sign Quote + Managed Services Agreement".



Signing: the customer draws their signature and enters their name and job title.



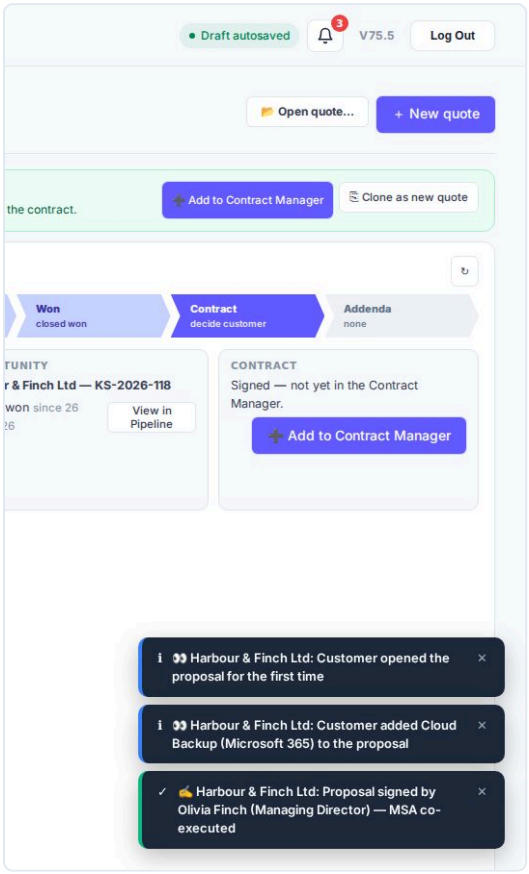
Once signed, the page shows the signature, the signer, their IP address and the date and time. It stays available to them.

One signature covers the order and the MSA

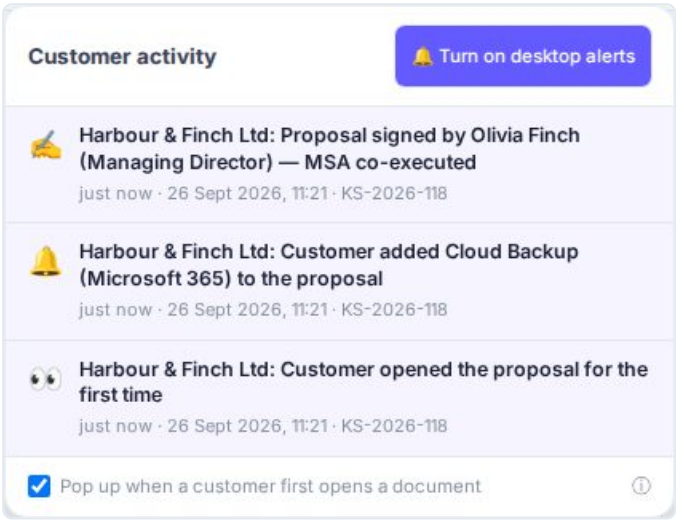
When the order includes a managed service, the customer's single signature accepts both the proposal and the Managed Services Agreement. The executed agreement is frozen with a fingerprint (SHA-256) so it can never change afterwards. The system records who signed, their title, the time and their IP address.

8 When the customer signs

You'll know straight away, and the order locks.



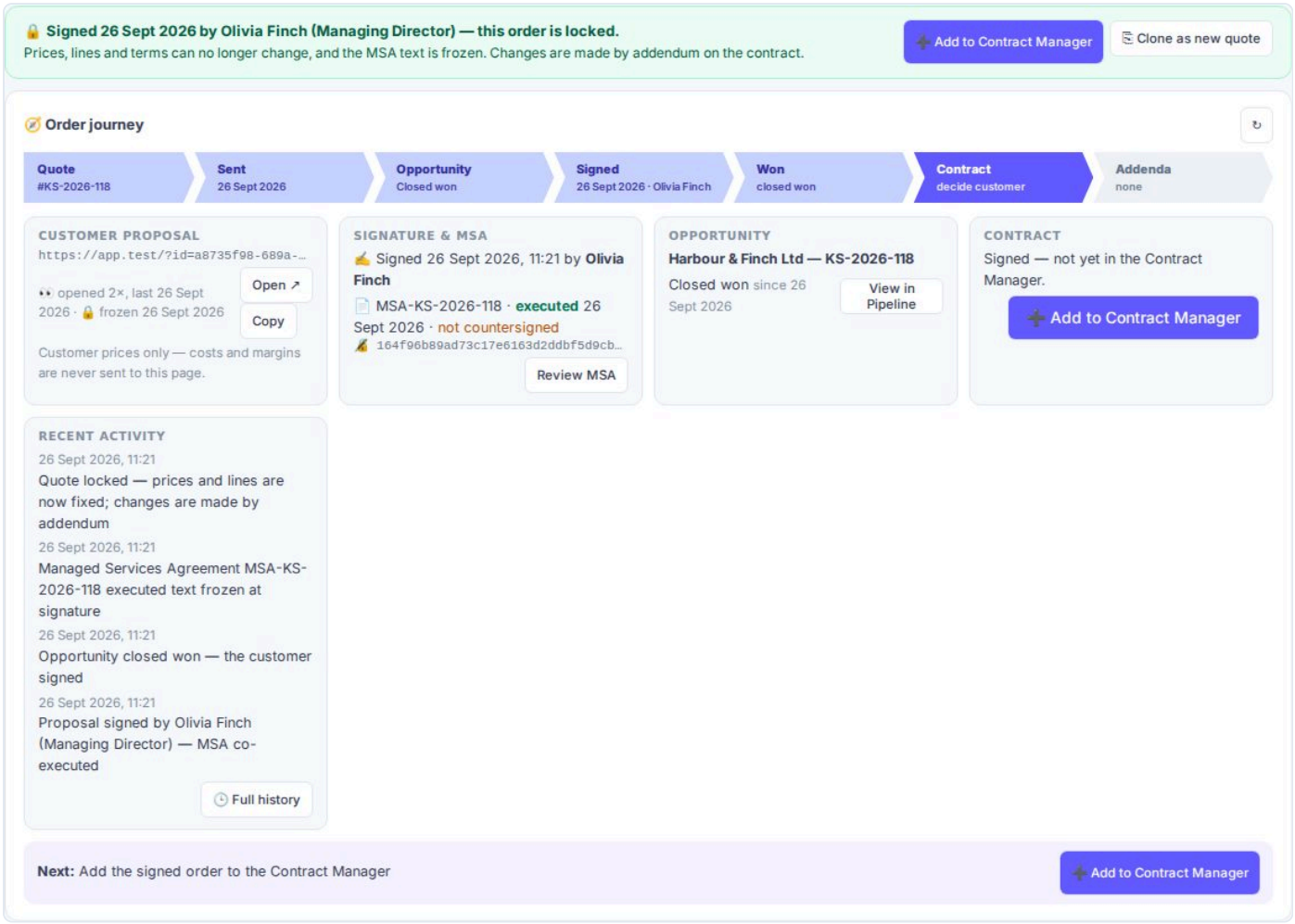
Pop-ups as it happens: opened, option added, signed.



The 🔔 bell lists all customer activity. Click an item to open its history.

- **Pop-ups** appear in SpeedQuote when a customer opens, changes options or signs. The **browser tab title** shows the number of unread updates, e.g. `(2)`.
- **Desktop alerts**: click **🔔 Turn on desktop alerts** in the bell panel once and allow notifications. You'll then be alerted even when SpeedQuote is in a background tab. SpeedQuote must be open in a tab for alerts to arrive.
- Untick *"Pop up when a customer first opens a document"* if you only want to hear about signatures.

Signed means locked



Signed, won and locked. The next step is to add it to the Contract Manager.

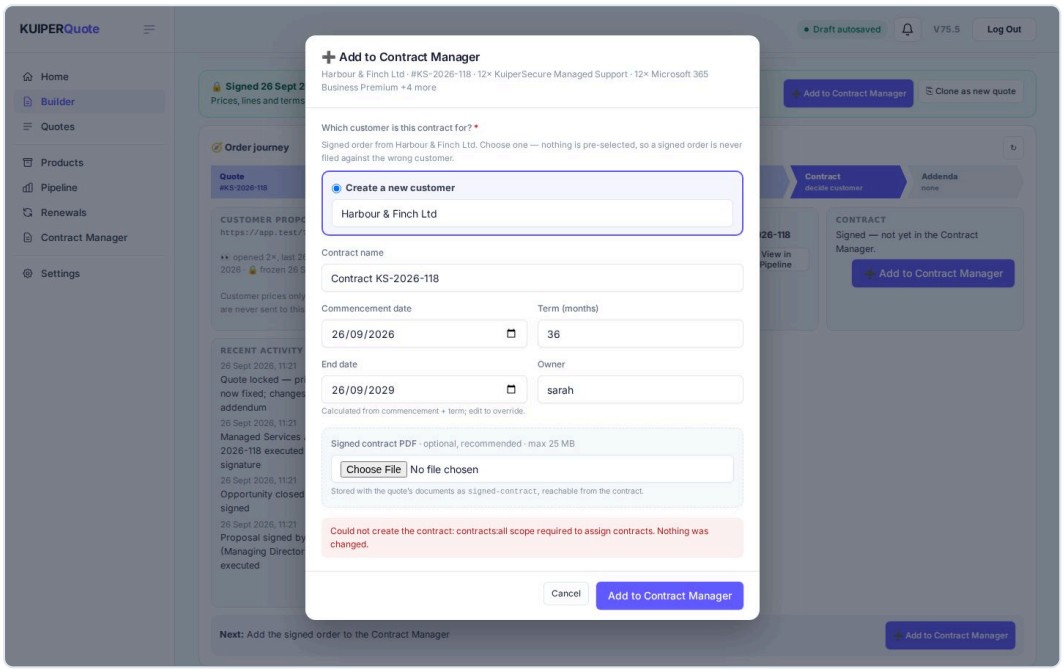
- The deal moves to **Closed won** in the Pipeline automatically.
- The quote becomes **read-only**: prices, lines and terms can't be edited or saved over. The Output menu still works for printing and copying the link.
- Need something different? Either raise an **addendum** once the contract exists (section 10), or use **Clone as new quote** to start a fresh, editable quote from it.
- If you had the quote open when the customer signed and you try to save, SpeedQuote refuses, so the signed version is never overwritten.

9 Handing over: adding the order to the Contract Manager

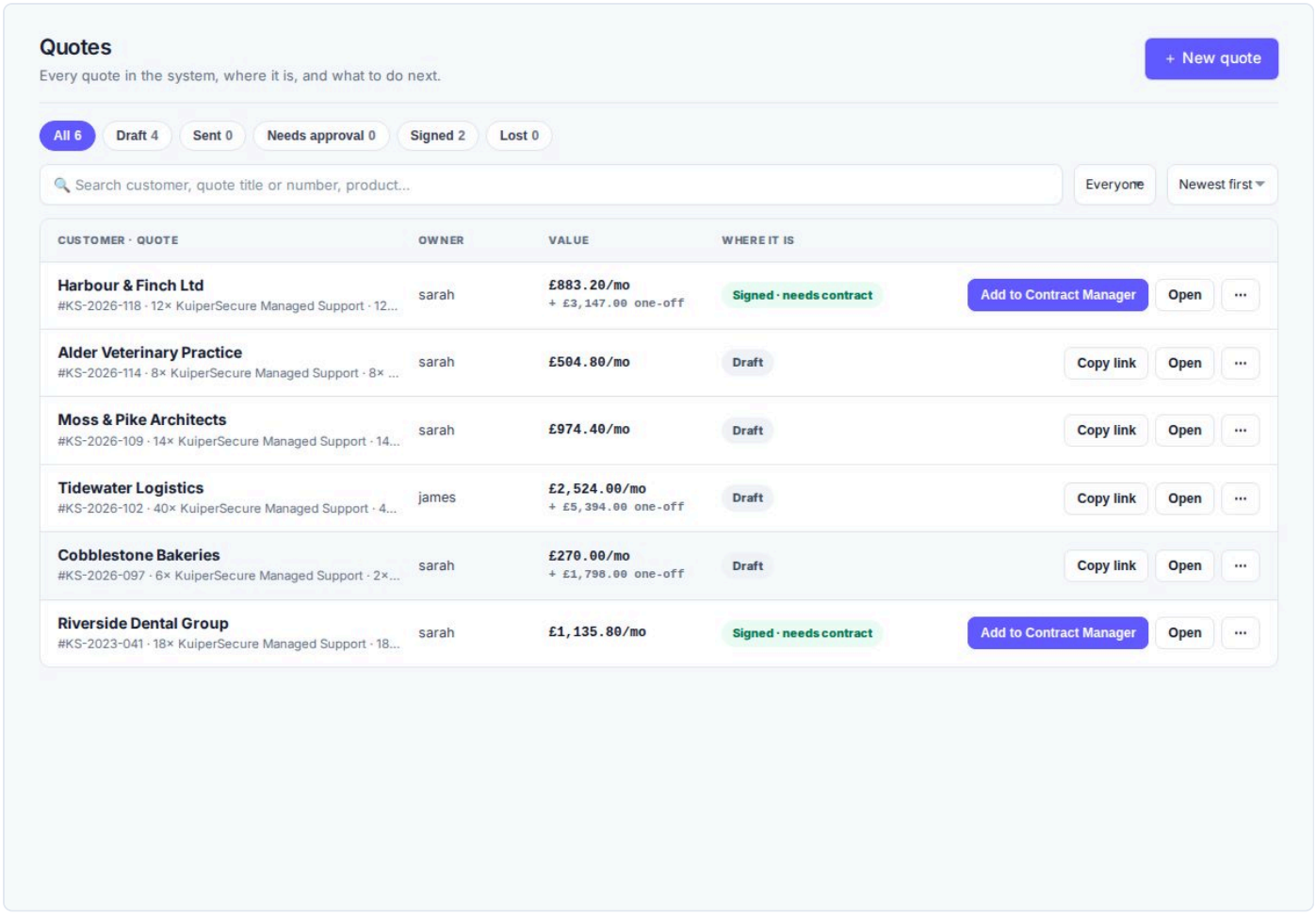
A signed order becomes a contract when it's added to the Contract Manager. Signed orders not yet added show as **Signed · needs contract** on Home and Quotes, and under **Needs attention** in the Contract Manager.

Who does this

By default **only Managers** can add a signed order to the Contract Manager, because it means choosing which customer record the contract belongs to. If you try without that permission, you'll see *"Could not create the contract: contracts:all scope required to assign contracts. Nothing was changed."* Tell your Manager the order is signed; it's already waiting in their Quotes list.

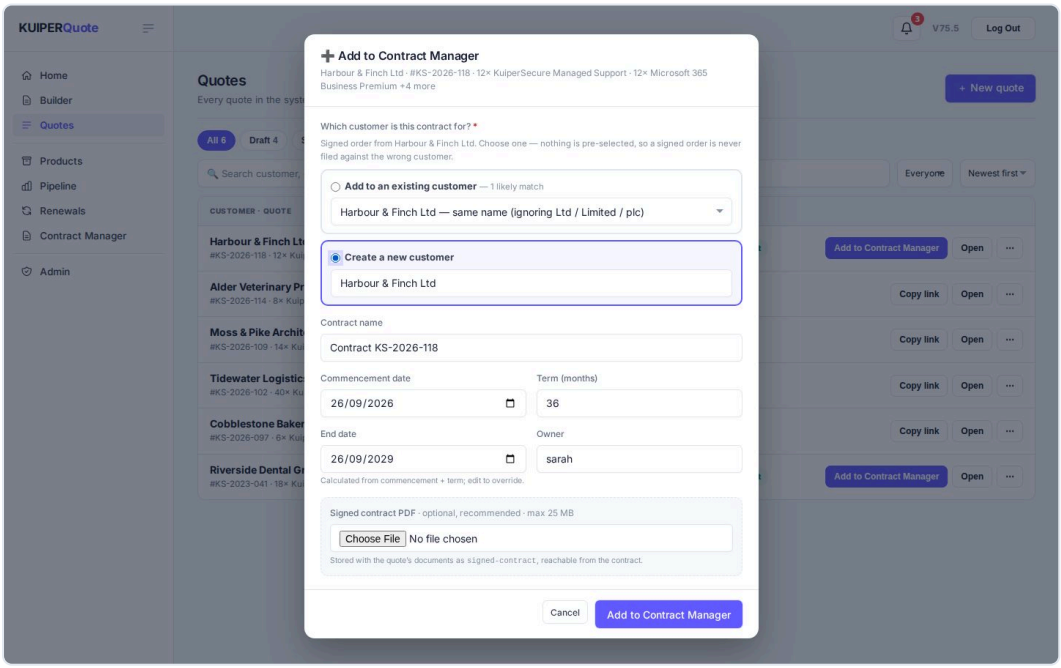


What a Sales user without the permission sees. Nothing is changed; hand it to a Manager.



Signed orders waiting to be added show **Add to Contract Manager** as the next action.

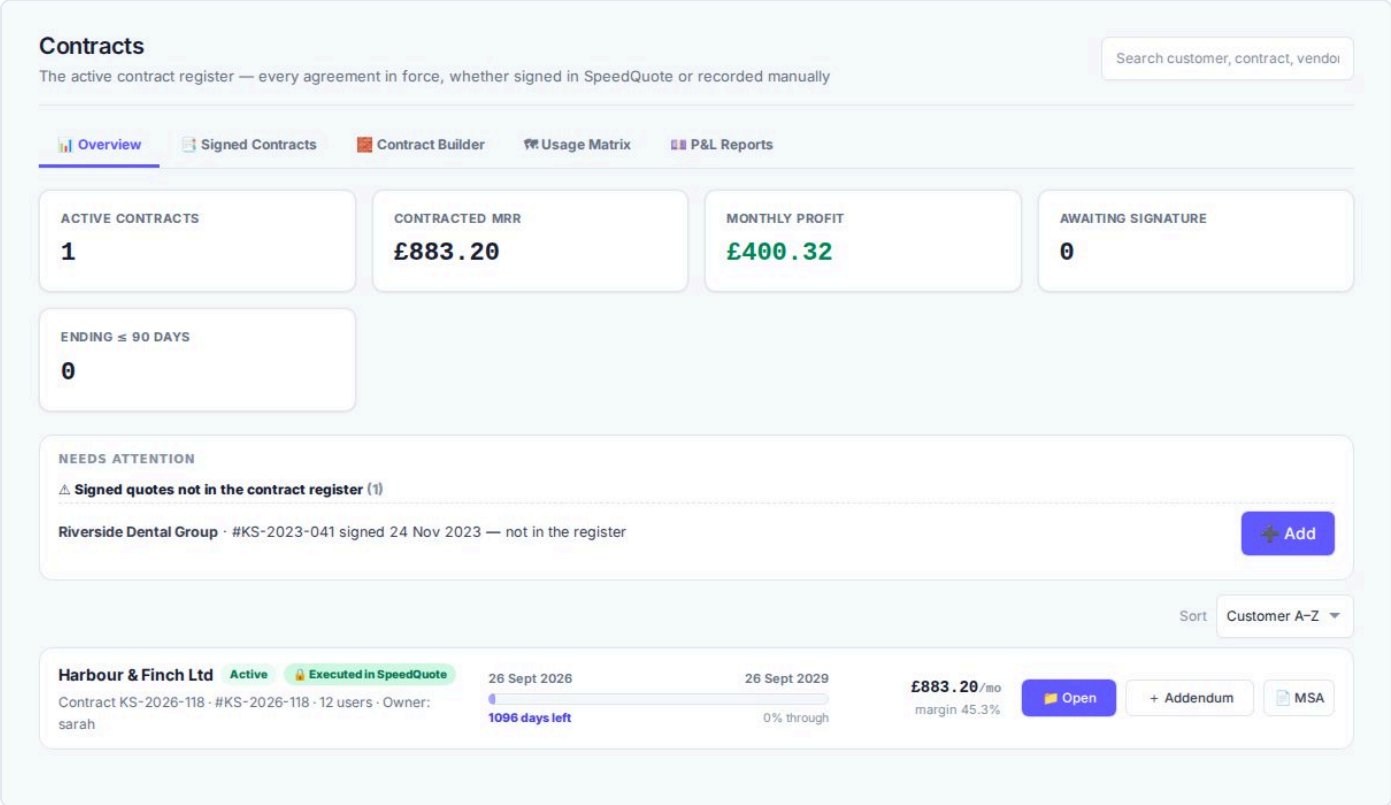
The customer decision



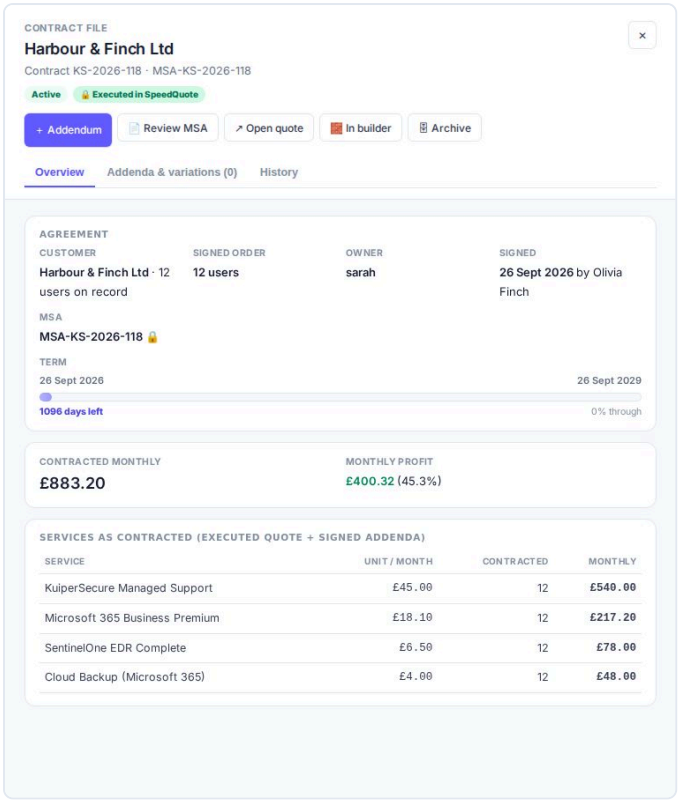
Nothing is pre-selected, so a signed order is never filed against the wrong customer.

1. **Existing customer or new customer?** If a likely match exists (e.g. "Harbour & Finch Limited" for "Harbour & Finch Ltd"), it's suggested first. Pick the existing customer if they already have contracts with us; otherwise create a new one.
2. Check the **commencement date**, **term** and **end date** (calculated from the term; you can override it), and the **owner**. The owner is the salesperson who sees and manages the contract; it defaults to the quote's author.
3. Optionally attach the **signed contract PDF**.
4. **Add to Contract Manager**. The contract file opens.

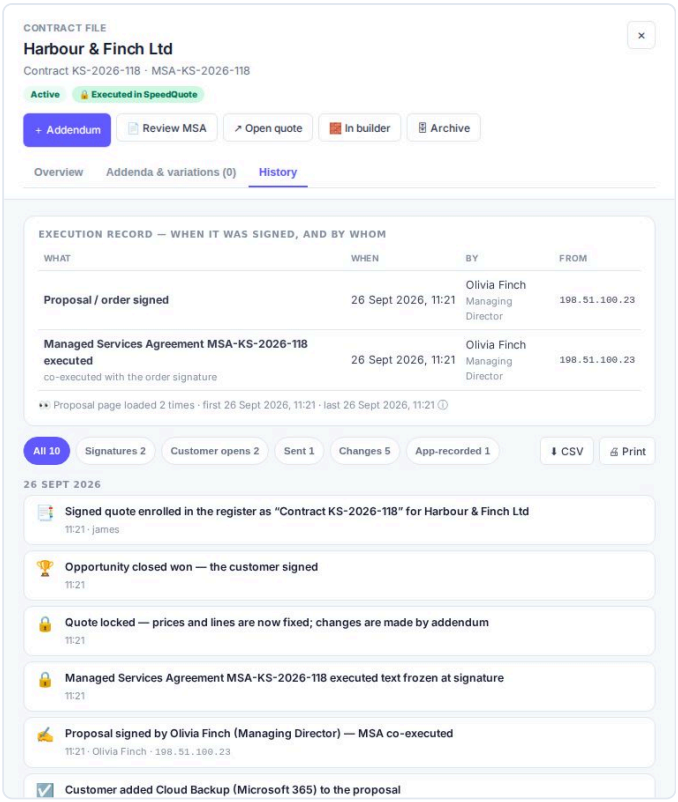
The contract file



The Contract Manager: live contracts, contracted MRR, anything awaiting signature and anything that needs attention.



Overview: customer, signed users, owner, who signed and when, the MSA, the term and the services as contracted.



History: the execution record (who signed, when, from which IP) and every event since.

The buttons along the top: **+ Addendum**, **📄 Review MSA** (the agreement), **↗ Open quote**, **In builder** and **Archive**. Once a variation is signed, **📄 Review MSA** shows the **agreement as varied**: a one-page summary of the services and charges now in force, then the MSA exactly as executed, then every signed variation in full. Its **Print** and **PDF** give the same document.

10 Changing a contract: addenda and variations

A signed contract is never edited. Every change (extra users, a new service, removing a service) is an **addendum**. It's issued to the customer as a **variation** they sign online, just like the original. Only then does it take effect.

1
Draft
Change quantities or add services in the addendum editor.
You

2
Issue
Send it for signature: email or copy the link.
You

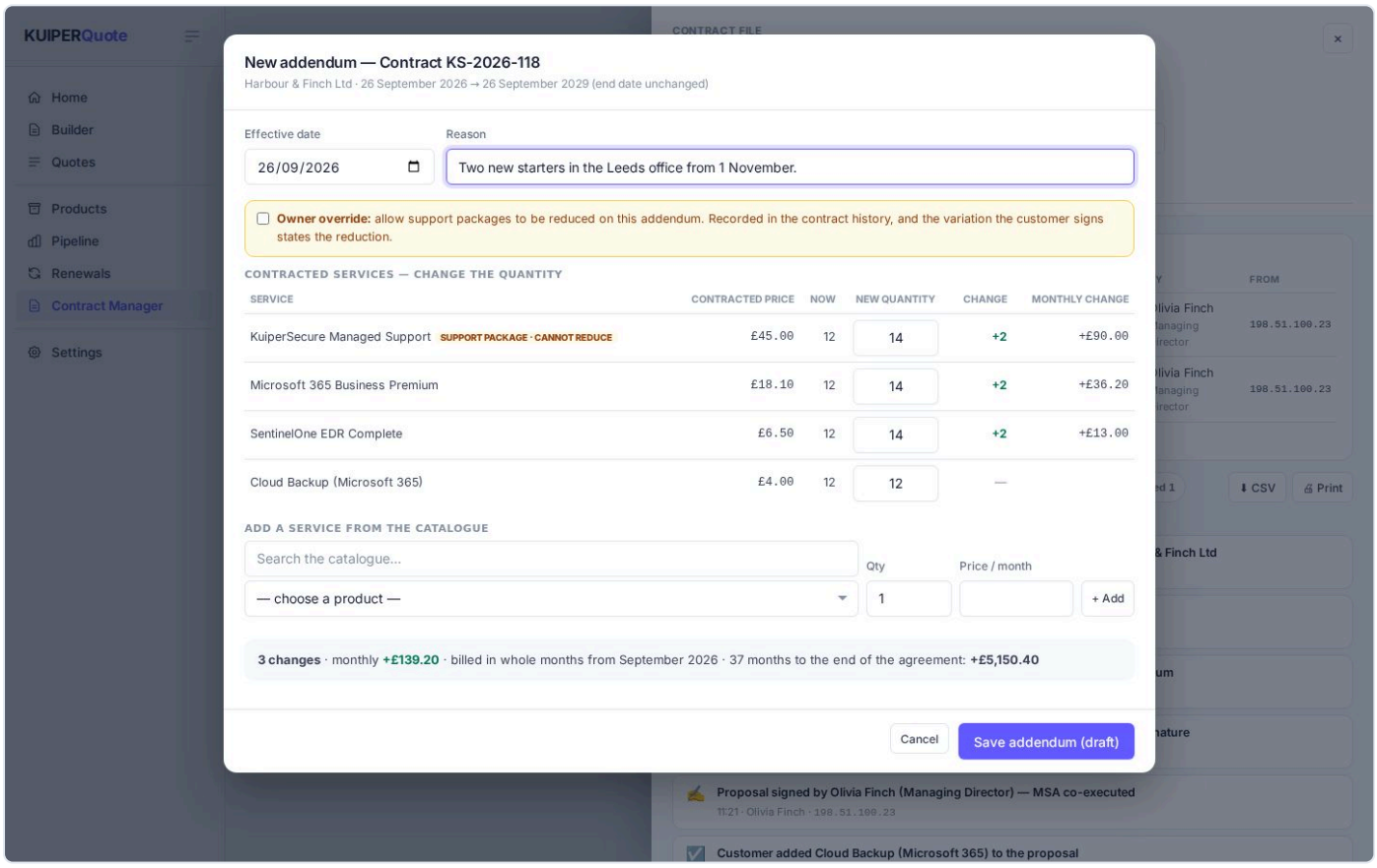
3
Opened
You're alerted when the customer opens it.
Customer

4
Signed → In effect
Contracted value updates everywhere.
Customer

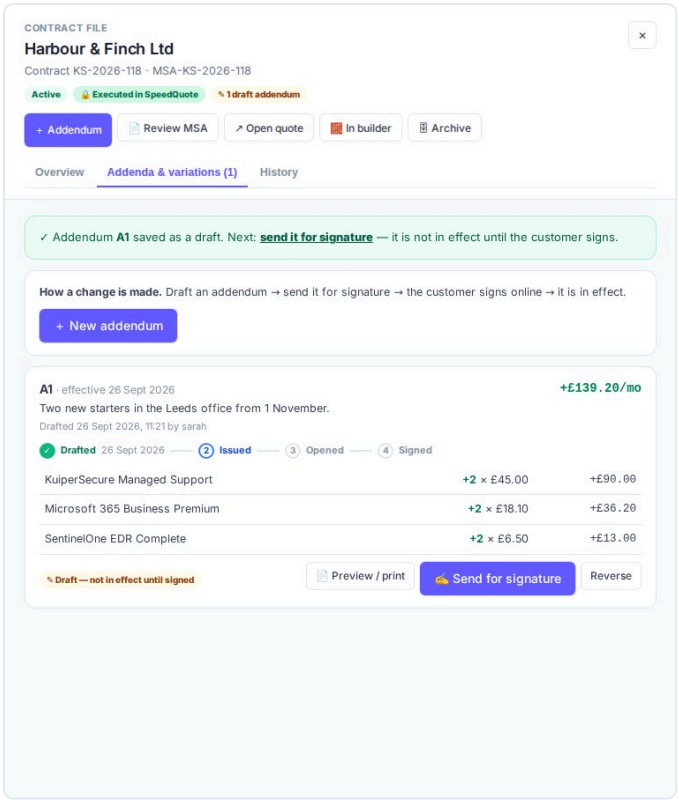
Step by step

1. Open the contract (Contract Manager → **Open**, or from the quote's journey panel) and click **+ Addendum**.

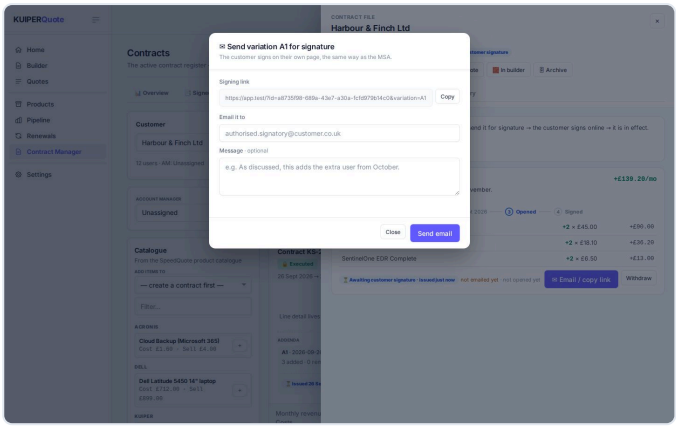
2. Set the **Effective date**: the date the change starts, which is what the customer is billed from. Enter a clear **Reason**; the customer sees it on the variation.
3. Change the **New quantity** on existing services, or add a service from the catalogue with its quantity and monthly price. The bottom line shows the monthly change and the value to the end of the agreement.
4. **Save addendum (draft)**. Nothing is sent yet, and you can still change or delete it.
5. Click **send it for signature**. Enter the customer's authorised signatory email and a short message, then **Send email**. Or **Copy** the signing link and send it yourself.
6. When the customer signs, you get an alert and the addendum shows **In effect**. The contracted monthly value, Home and the register all update.



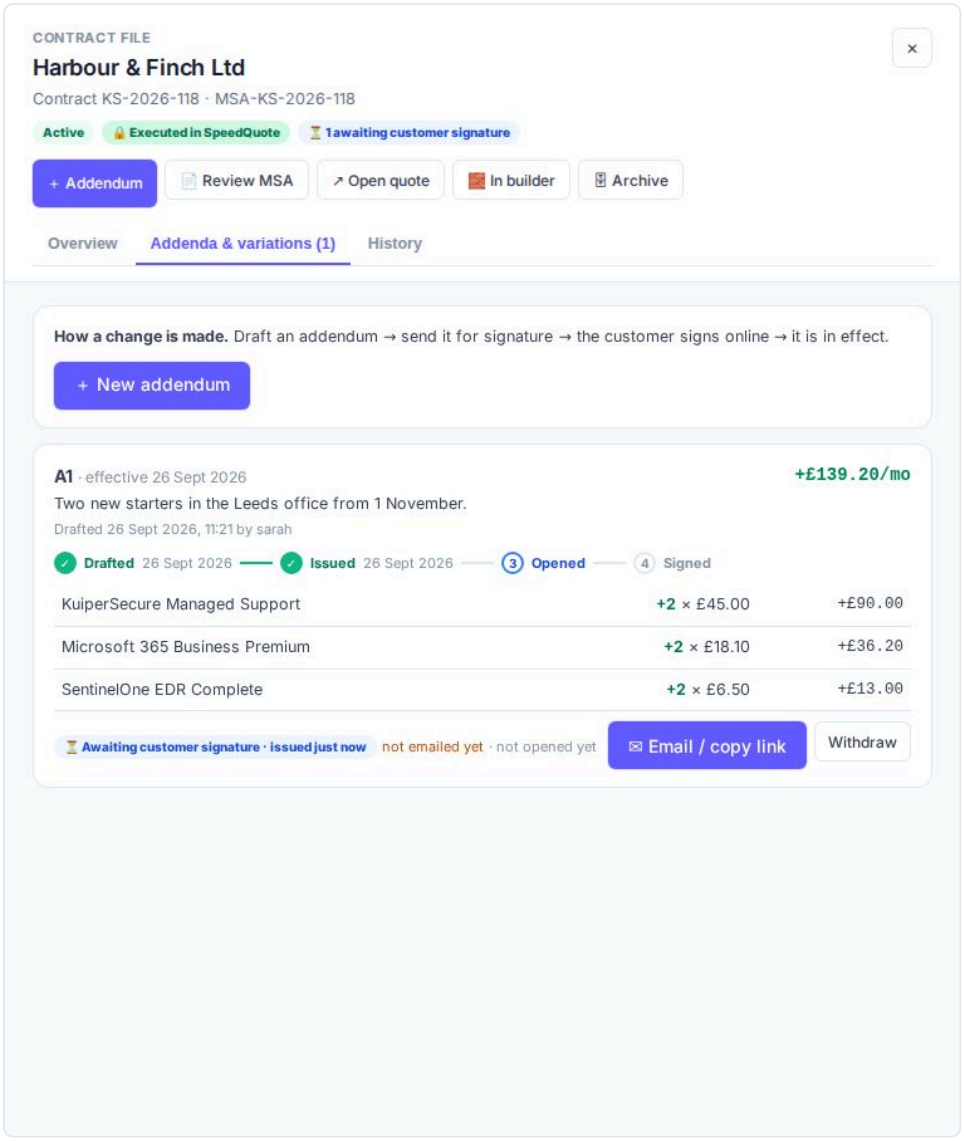
The addendum editor: +2 users on three services. Support packages can be increased but not reduced by addendum. Only an Owner can override that, with a recorded reason; ask your Manager if a customer's users were raised in error.



Saved as a draft: A1, with the next step to send it for signature.

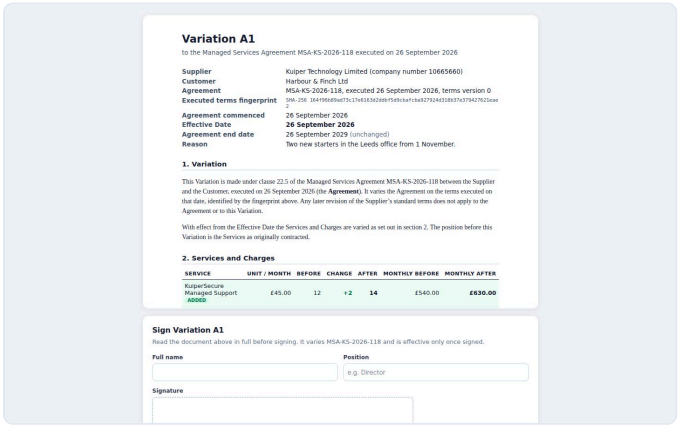


Sending the variation: email it, or copy the link.

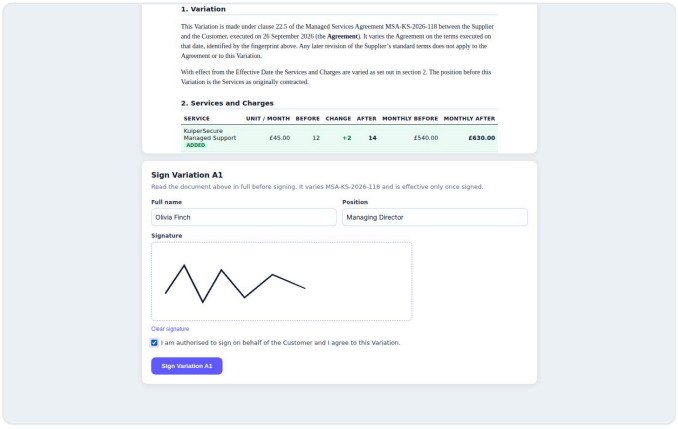


Issued: the tracker shows Drafted → Issued → Opened → Signed. Use **Withdraw** to cancel an issued variation (the link stops working); **✉ Email / copy link** to resend.

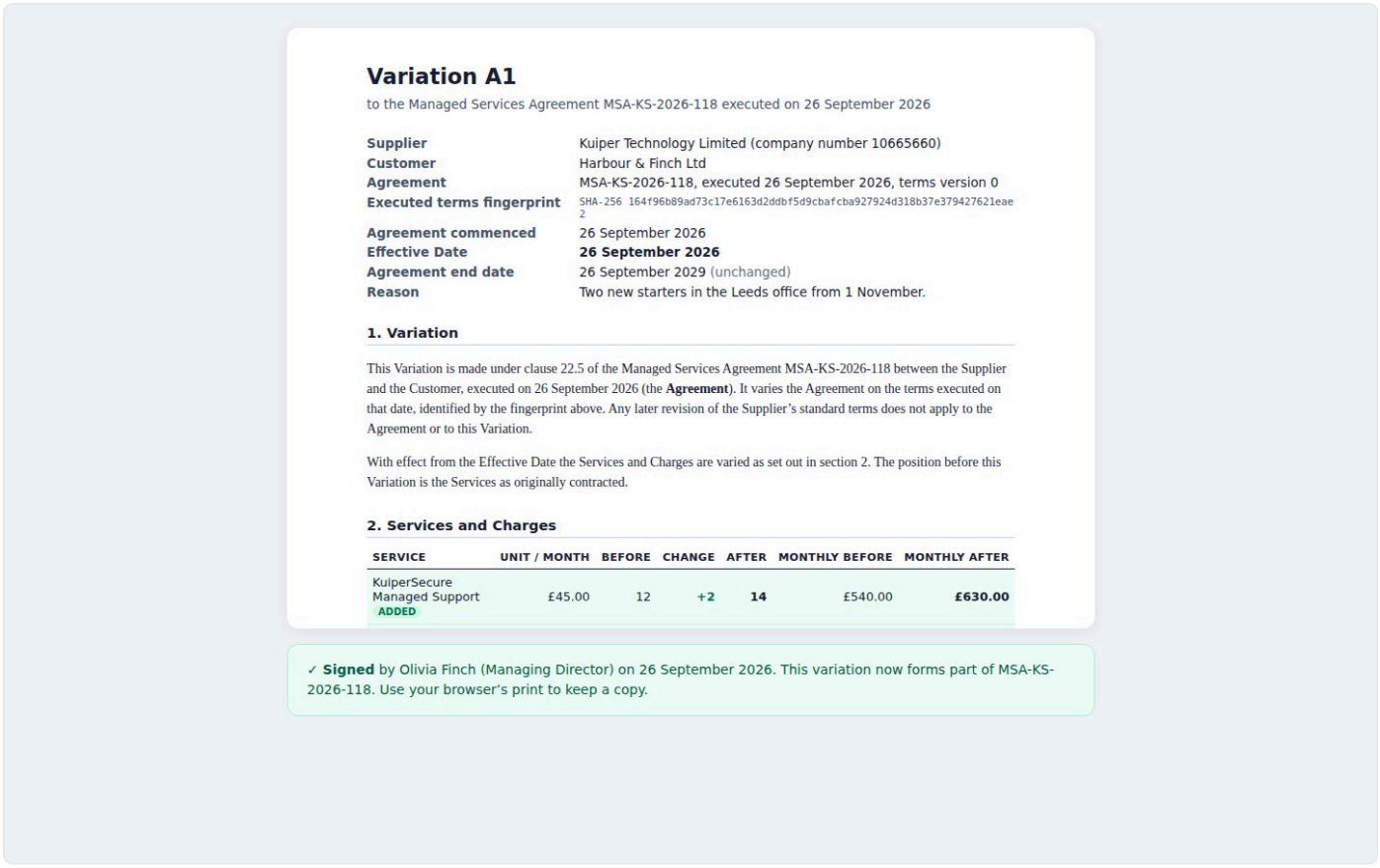
What the customer sees



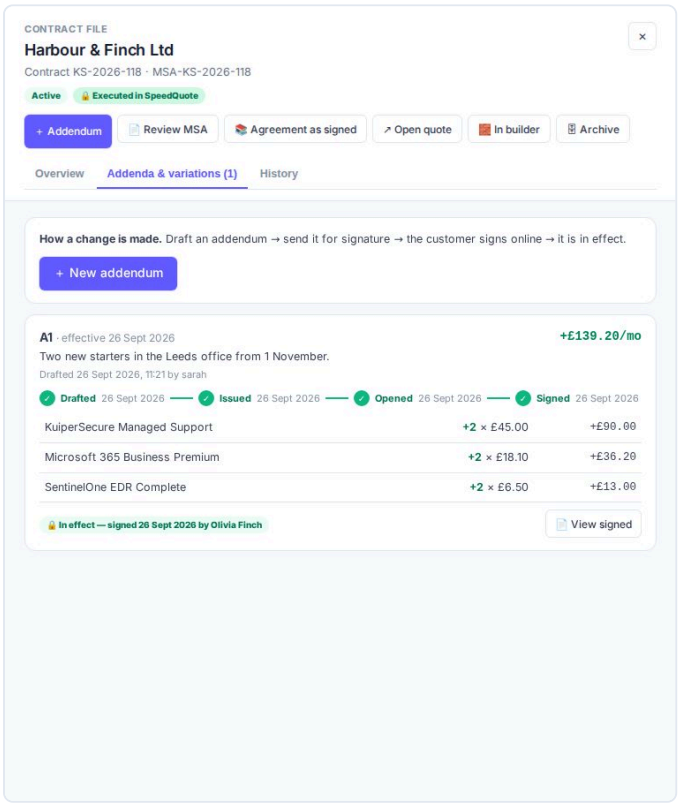
The variation: which agreement it varies, the effective date, the reason, and a before/after table of services and charges.



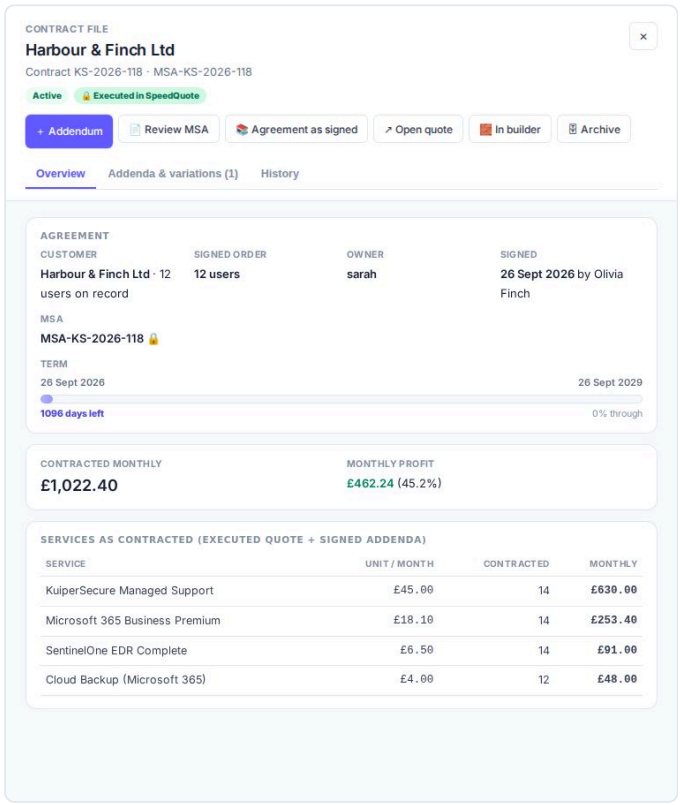
They enter their name and position, sign, and confirm they're authorised.



Signed: the variation now forms part of the MSA.



Back in SpeedQuote: **In effect**, signed by the customer.



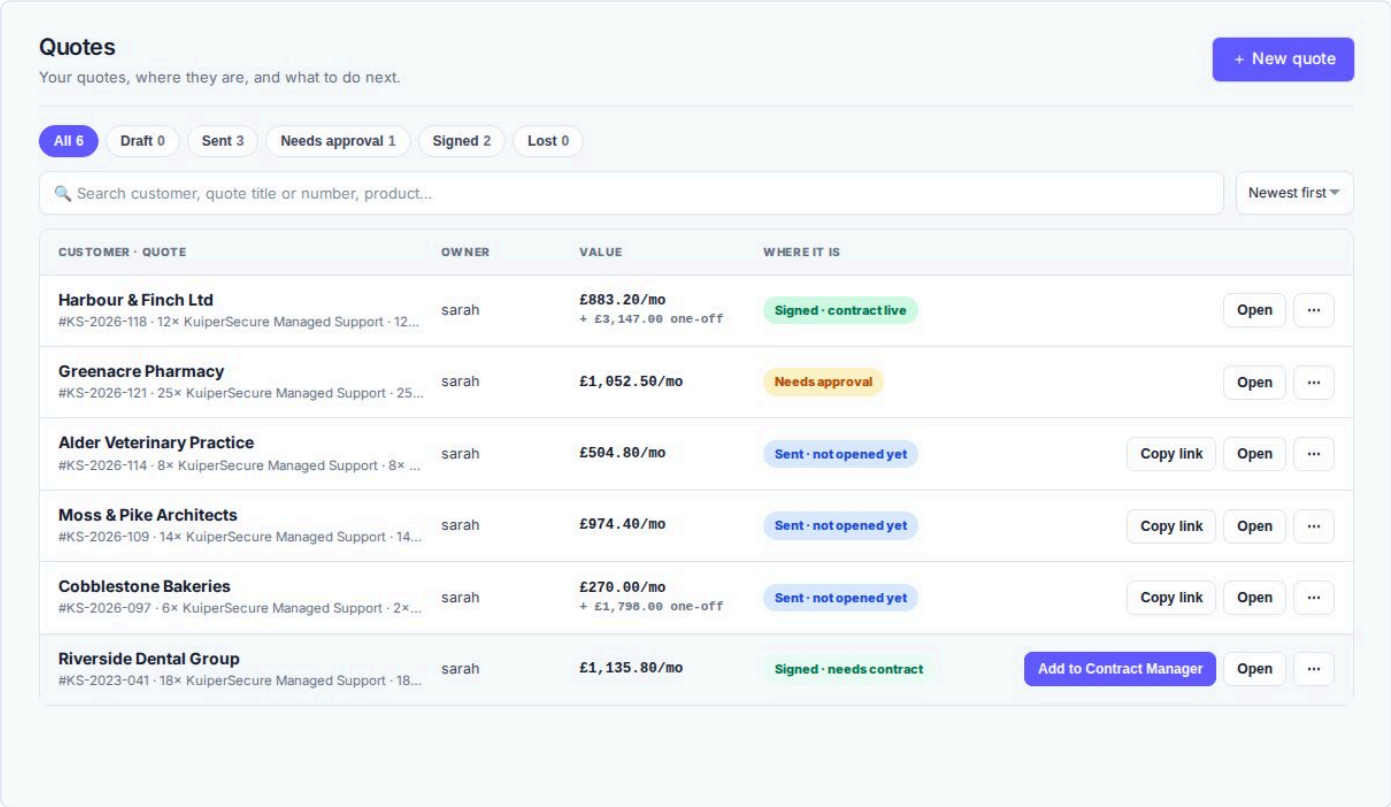
The Overview now shows the contract as varied.

Good practice for addenda

- One addendum per change request. Several small addenda are clearer than one that mixes unrelated changes.
- Set the effective date to when the change really starts (e.g. the new starters' first day), not the day you draft it.
- Contracts that weren't signed in SpeedQuote (entered manually or imported) can't be varied by e-signature. SpeedQuote tells you to print the variation and have it signed on paper.
- If the change is really a new deal, such as a new site or a different term, use a **new quote** instead.

11 The Quotes page

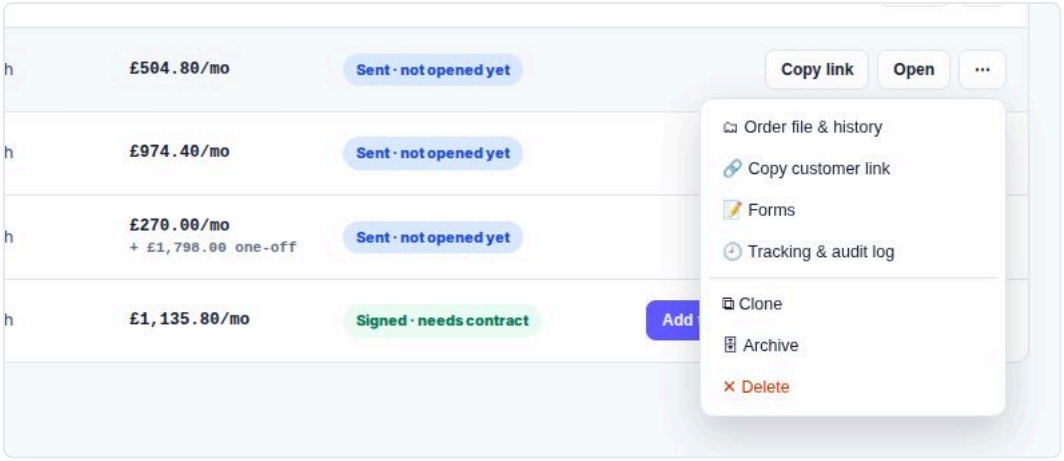
Every quote you own on one list, with where it is and the one obvious next action.



Filter by stage with the chips; search by customer, number, title or product; sort by date, value or customer.

"WHERE IT IS"	MEANS	NEXT ACTION
Draft	Saved, not sent.	Copy link / Email from the builder.
Sent · not opened yet / **Sent · opened n×**	With the customer.	Follow up. The number of opens tells you they're looking.
Needs approval	Below the margin floor; waiting for a Manager.	Don't send until approved.
Signed · needs contract	Signed, not yet in the Contract Manager.	Add to Contract Manager (Manager).

Signed · contract live	In the register.	Changes by addendum.
Lost / declined, **Archived**	Closed.	Clone if it comes back to life.

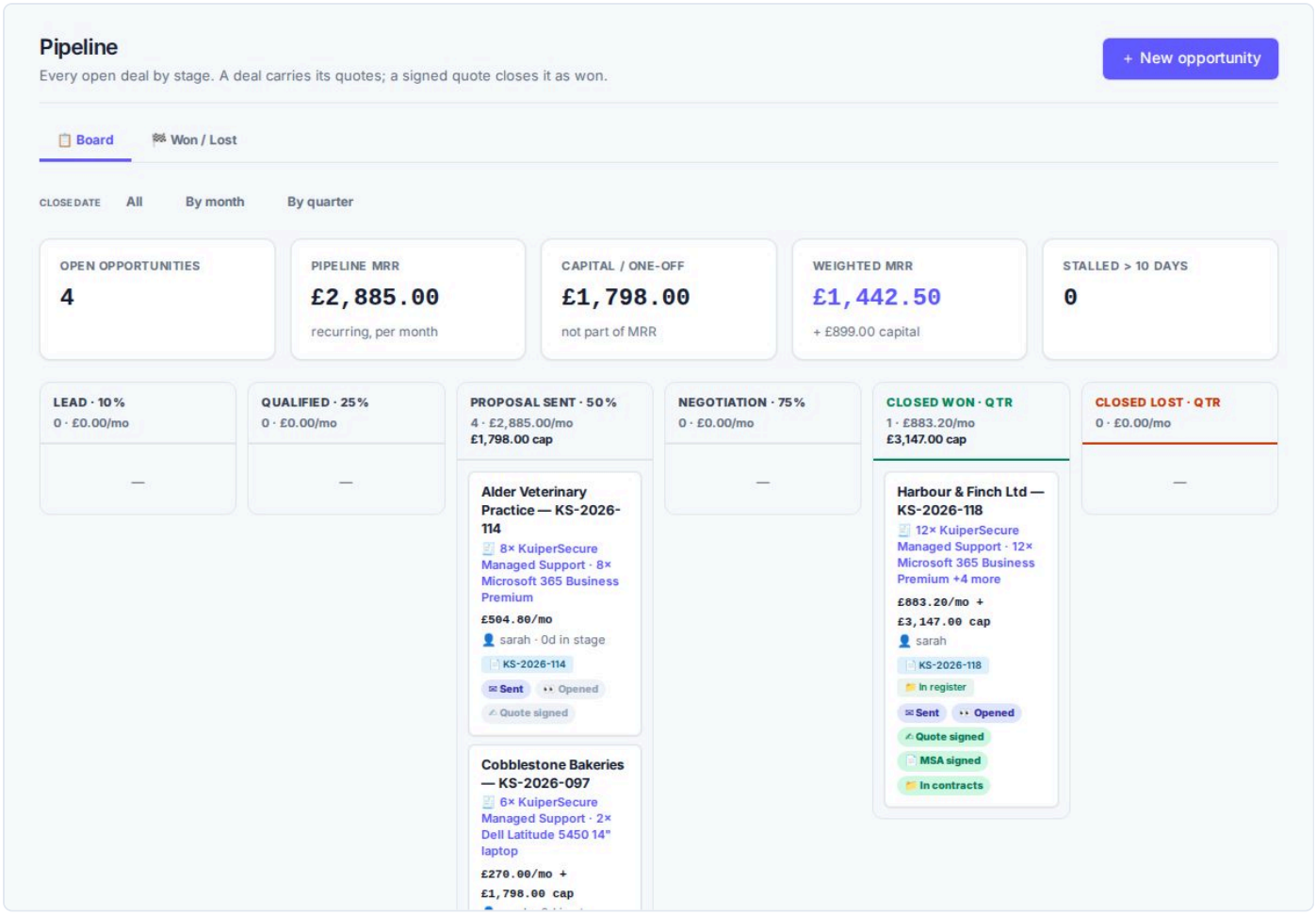


The ··· menu on each row.

- **Order file & history**: the full tracking log: sent, opened (with times), options chosen, signed, enrolled.
- **Copy customer link**: the same live link as in the builder.
- **Forms**: attach order forms (e.g. onboarding details) and see whether they've been completed.
- **Clone**: a new editable copy. **Archive** hides a dead quote without deleting it. **Delete** removes it for good (if your permissions allow).
- Managers also get **Transfer to…** (reassign the quote to another salesperson) and **Approve / Decline**.

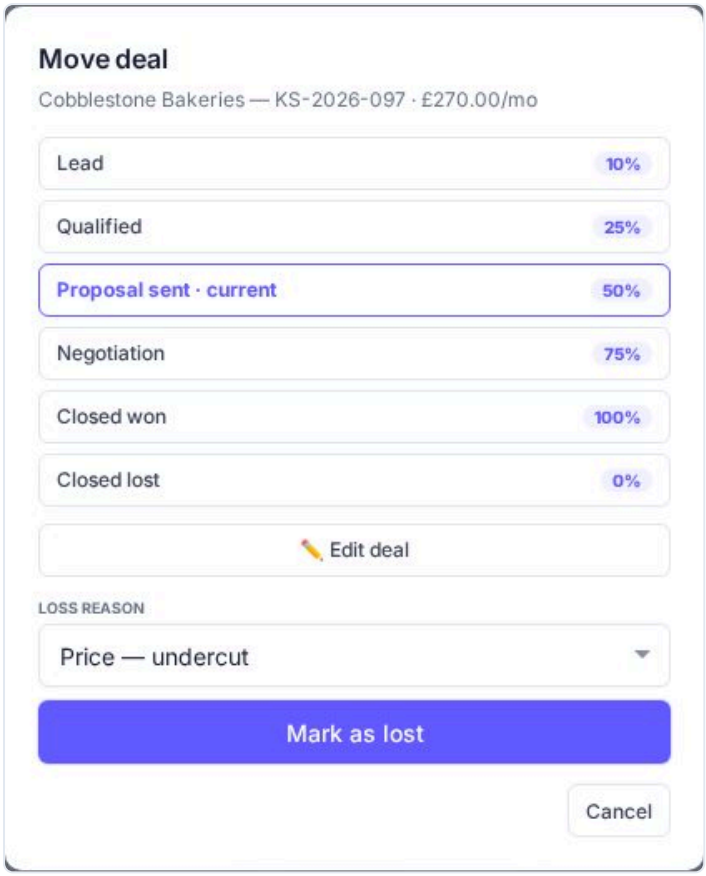
12 Pipeline

Your deals by stage. A deal opens automatically when you send a quote and closes as won when the customer signs. You can also add early-stage deals yourself.

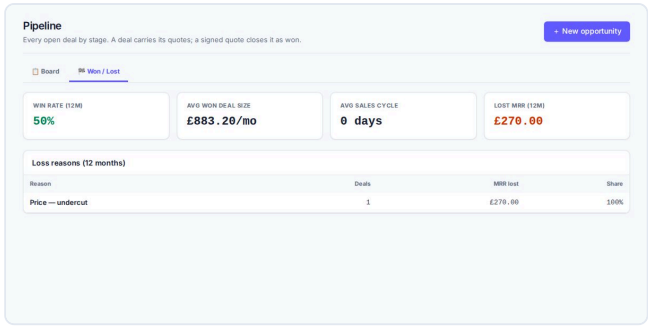


The board: Lead 10% · Qualified 25% · Proposal sent 50% · Negotiation 75% · Closed won (this quarter). Lost deals are listed under Won / Lost. "Weighted MRR" multiplies each deal by its stage probability.

- **+ New opportunity** for a deal that doesn't have a quote yet (Lead or Qualified).
- Each card shows the customer, value, owner, days in stage and chips for where it is in signing: **Sent · Opened · Quote signed · MSA signed · In contracts**.
- **Click a card** to move it to another stage. Moving to **Closed lost** asks for a **loss reason**. Please always give one; it feeds the Won/Lost report. The deal then leaves the board and appears under **Won / Lost → Lost deals**; click it there to reopen it.
- A deal whose quote has been **deleted or archived** (for example a test quote) is left off the Pipeline. Restoring the quote brings it back.
- **Stalled > 10 days** counts deals that haven't moved; chase those first.
- 🔄 Renewal deals appear automatically for contracts ending within 90 days.



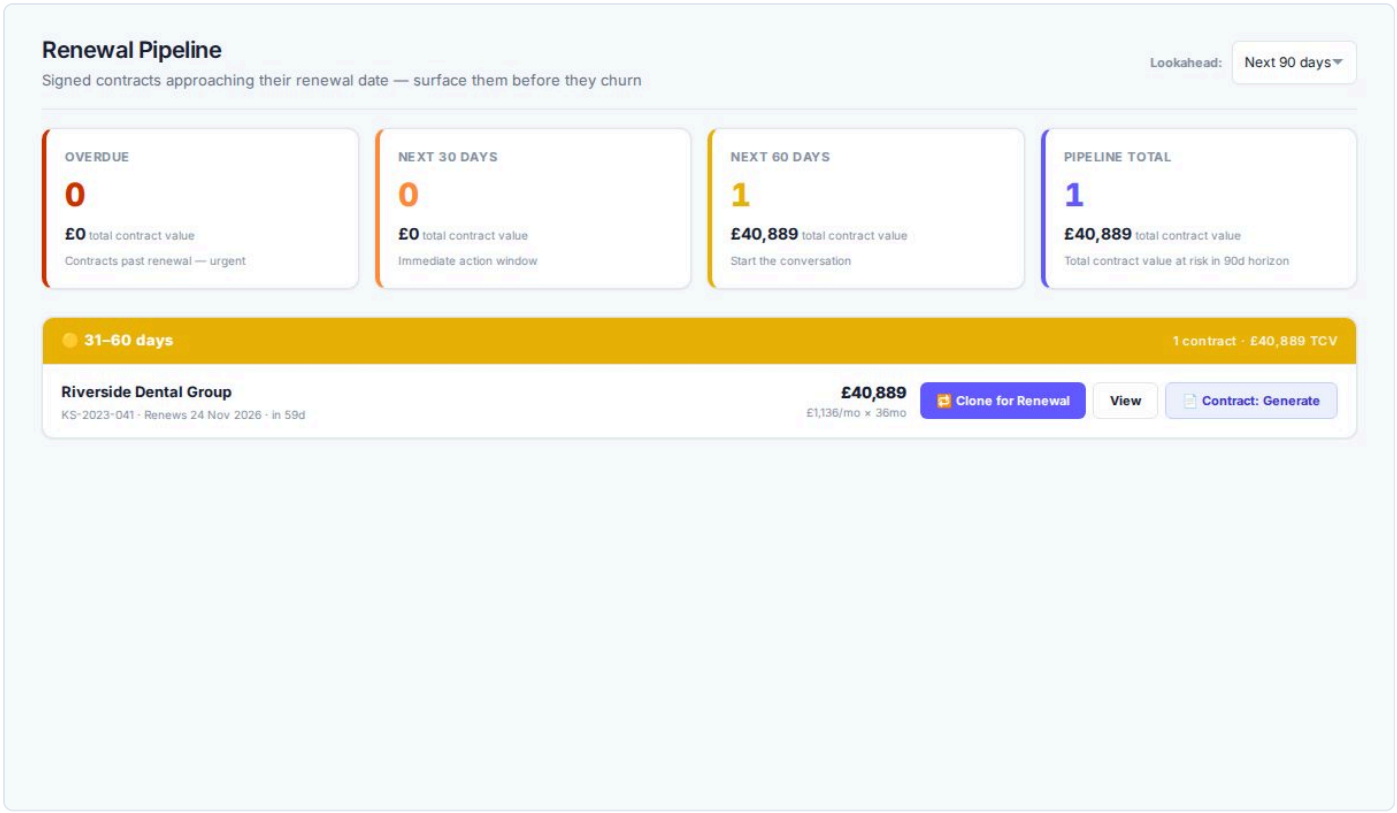
Moving a deal to lost, with the reason.



Won / Lost: win rate, average won deal size, sales cycle, loss reasons and the lost deals over 12 months.

13 Renewals

Signed contracts approaching the end of their term, grouped as overdue, next 30, 31–60 and 61–90 days (change the look-ahead at the top right).



A contract renewing in 58 days. **Clone for Renewal** starts a new quote from the current one.

Start renewal conversations in the 61–90 day window. Use **Clone for Renewal**, update the lines and term, and send it as a normal proposal. The new signature starts a new agreement.

14 Products

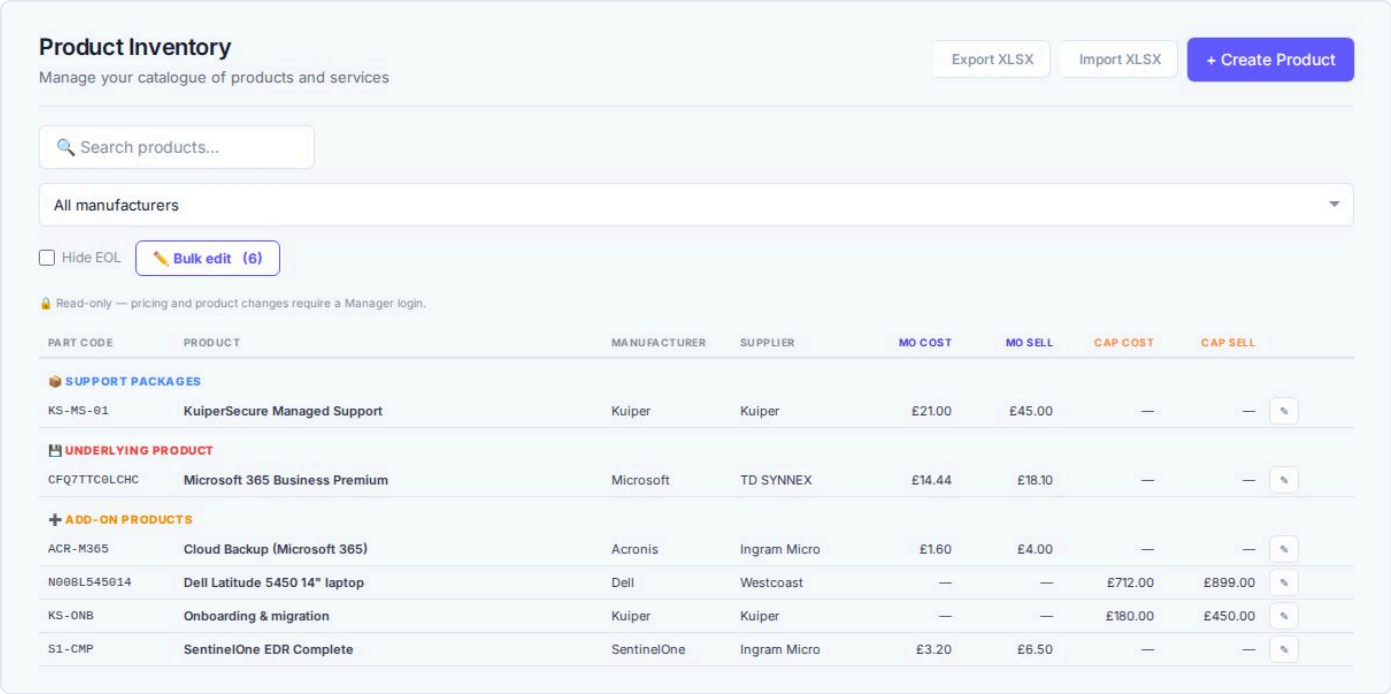
The product catalogue. Sales can view it; changes are made by a Manager.

- **One filter bar:** search (name, part code, manufacturer, supplier), category, manufacturer, supplier, and **Hide end of life**.
- **Cost, Sell and Margin** for each product's own billing (monthly or one-off). Managers can type a new cost or sell straight into the list; the margin updates at once. Margin turns amber under your margin floor and red below cost.
- **Needs attention** shows products to tidy: no part code, no supplier, a package with no scope of works, no price, selling below cost or under the floor, or not on any quote in 12 months.
- Click a row to edit it. ··· on a row: Edit, Duplicate, Mark end of life / Restore, Delete.
- **Bulk ▾** acts on every product in the list: **Edit a field**, or **Refresh costs from distributors**, which looks up each part code, shows the cheapest cost next to the current one, and applies only the rows you tick. Sell prices are not changed.

Editing a product

The editor opens at the side in sections: **Basics** (name, category, billing, part code, manufacturer, supplier), **Pricing** (cost, sell and live margin; **Check distributor price** with **Use** to take a distributor's cost; the price history), **On quotes** (quantity follows seats, end of life, MSA required), **Proposal** (scope of

works, engineering hours, datasheet link) and, for packages, **Components**. A package is priced from its components unless you tick **Set the sell price myself**. Before saving it warns about a duplicate part code, no price, selling below cost or a margin under your floor.



Products. End-of-life products can't be added to new quotes.

15 Troubleshooting and FAQ

The customer wants to change something after signing.

The signed order can't be changed. If it's in the Contract Manager, raise an **addendum** (section 10). If it's a different deal altogether, **Clone as new quote**. If the signature itself was a mistake, speak to a Manager.

"This quote is signed and locked — it cannot be saved over."

Working as intended: the customer has signed. See the answer above.

"The customer has signed this quote since it was opened."

You had the quote open while the customer signed it. Your copy is out of date and SpeedQuote won't let it overwrite the signature. Reopen the quote to see the signed version.

The customer says the page says "Proposal not quite ready".

The quote is below the margin floor and waiting for a Manager, or a Manager declined it (section 6). Ask your Manager to approve it; the same link then opens and can be signed.

"Could not create the contract: contracts:all scope required..."

Your permission group can't add signed orders to the Contract Manager. Ask a Manager to do it; the order is waiting under Quotes → Signed.

I didn't get a desktop alert.

Desktop alerts need (1) SpeedQuote open in a browser tab, (2) **Turn on desktop alerts** clicked in the 🔔 panel, and (3) notifications allowed for the site in your browser. If the panel says "blocked by the browser", allow notifications in the browser's site settings (the padlock icon in the address bar).

"Proposal not found or has expired."

The quote was never saved, or it's been deleted. Save it and copy the link again. Always use Copy link or Email from SpeedQuote rather than typing the address.

I sent the link, then changed the quote.

The customer sees your latest saved version on the same link. Let them know it's changed. Versions keeps what was there before.

"Save blocked" or "Could not load your data".

SpeedQuote didn't load everything it needs, so it won't save to protect the data. Refresh the page and sign in again. If it persists, tell your Manager.

A yellow banner says the API worker is older than the app.

The system is part-way through an update. Tell your Manager; the customer-facing pages may not behave correctly until it's finished.

16 Words we use

TERM	MEANING
Proposal / proposal link	The customer's web page for a quote, where they choose options and sign.
MSA	Managed Services Agreement: the master terms for managed services. Executed with the customer's signature when the order includes a managed service.
Opportunity / deal	A Pipeline card. Opens when a proposal is sent; closes as won when it's signed.

Locked	Signed: the order can't change.
Contract / contract file	The signed order in the Contract Manager, with its history and addenda.
Addendum	A change to a contract, drafted in SpeedQuote.
Variation	The document the customer signs to agree an addendum. It becomes part of the MSA.
MRR	Monthly recurring revenue: the monthly services total.
Capital	One-off charges: hardware, onboarding, projects.
Margin floor	The minimum margin allowed without Manager approval.

Screenshots were taken from SpeedQuote V75.5 with made-up customers and prices. Your screens may show different products, prices or permissions.