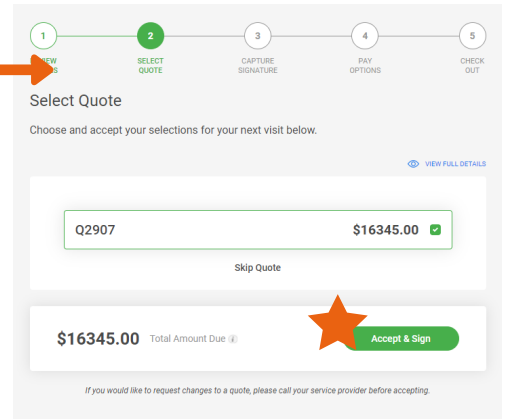


Helping Your Customers Accept Quotes with DocuSign

When your customers open the email with their pending quote, there will be a clickable link that says **View Your Quote**. Doing so takes them to the consumer portal to review/accept Quotes with DocuSign.

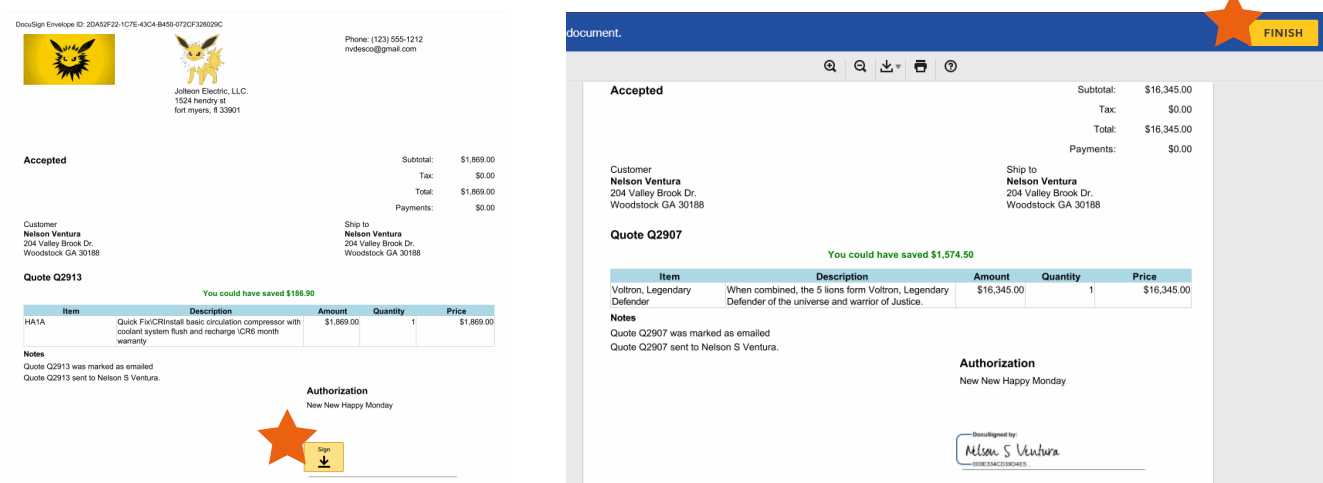


Once your customer chooses to **Accept & Sign** the Quote, they'll be directed to DocuSign to complete the process. Once in DocuSign, they'll click **Continue** to proceed.

**If changes need to be made to the Quote before signing, they should not click the Accept button here, and instead should speak to your office so changes can be made and a new DocuSign can be sent.*



If approved, the next step will be to click **Sign** at the bottom of the Quote. At this point, the signature will populate, and they can then click **Finish** to continue.



Once finished, they will be redirected back to the consumer portal to choose the deposit amount, enter the payment details, and see the Quote as accepted once payment details are submitted.

