Letting Orsa draft a Quote

Orsa can draft a Quote from what the customer described, using only your own price book.

Steps

1. Open the job and press Draft it from this.
2. Orsa picks lines from your price book. The price book works out every figure.
3. Check every line, change anything, and send it yourself.

Good to know

Orsa never sends a Quote and never invents a price. If something is not in your price book, it says so.

https://orshihq.com/help/orsa-draft-quote