

Proposals and Service Agreements - Unwanted PDF Copies of Forms Included in Email (16160)

Last Modified on 01/17/2024 3:02 pm EST

When emailing proposals and service agreements from the Navusoft application, if the user selected forms to attach with the email, a PDF copy of the proposal/agreement was also attached even if the 'Include Attachment?' check box wasn't checked. This has been resolved.

The screenshot displays the 'EDIT PROPOSAL - 3915' interface. The background form shows the following details:

- ACCOUNT: 43696 / JUICE IT UP
- DOCUMENT FORMAT: Proposal
- DOCUMENT TYPE: A-New Business-From Compe
- STATUS: Open
- SOURCE: Employee
- SALES REP: House Acct non System
- TITLE: (empty)
- EFFECTIVE DATE: 01/17/2024
- TERM: 24 Months
- PRINT EST. SURCHARGE: No
- NOTE: (empty)
- DELIVERY INSTRUCTION: (empty)
- PAYMENT REQUIRED AT CU: Not Required
- CUSTOM FIELD1 TEXT: (empty)

The 'EMAIL PROPOSAL' dialog box is open, showing the following fields and options:

- SEND TO (EMAIL): aliena@fakeEmail.com
- EMAIL TO CONTACTS: (dropdown menu)
- SUBJECT: Proposal / Agreement
- FORMS: (dropdown menu)
- INCLUDE ATTACHMENT?:
- CC SALES REP:
- CC SENDER:

The email body text in the dialog box reads:

Dear

Thank you for discussing your needs with me so I could offer you a solution that should not only meet your needs, but my goal is to exceed your expectations. Please review the attached proposal I built for you by [clicking here to review your service proposal](#).

Please contact me directly if you have any questions or need additional information. I look forward to working together.

Have a great day!

House Acct non System - House Account

Pathway: Accounts (Customer Service Screen) > Orders, Quotes, and Contracts (section)