

Contracts/Proposals (Accounts) - Ability to Text Message Documents for Viewing and Signing (18405) [New Feature]

Last Modified on 05/30/2025 9:16 am PDT

Proposals and Contracts now support sending documents to contacts via text message for viewing and signing. To accommodate this enhancement, the **Send Email** button has been replaced with a **Send Notification** drop down, offering options for **Email** and **Text Message**. Similar to the email method, if a contact is associated with the account, they will display in the **Send to Contact** drop down for quick selection.

The screenshot displays the 'EDIT DOCUMENT - PROPOSAL 4175' interface. The top navigation bar includes tabs for Settings, Services (with a red notification badge), History (with a red notification badge), Attachment, Master Agreement, Term Addendums, and Surcharge Rates. Below the tabs is a table with columns: SITE ID, START DATE, QTY, SERVICE CODE, and FREQU. The table contains one row with the following data: SITE ID 49317001, START DATE, QTY 1, SERVICE CODE 10 Yard Open Top Service - Recycle, and FREQU. Below the table are buttons for SAVE, PRINT, and SEND NOTIFICATION. A red arrow points to the SEND NOTIFICATION button, which has a dropdown menu open showing 'EMAIL' and 'TEXT MESSAGE' options. To the right, a 'TEXT MESSAGE PROPOSAL' modal is open, showing a 'SEND TO CONTACT' dropdown, a 'MOBILE PHONE' field with a US flag icon and the number (999) 999-9999, a 'TEMPLATE' dropdown with the selected option 'Please Sign QA Waste Service Agreement', and a large text area with the placeholder text 'Please view and approve attached proposal'. A 'SEND' button is at the bottom of the modal. The bottom right of the main interface shows a status bar with 'Saved at 10:05 am.'

Pathway: Accounts > Orders, Quotes and Contracts