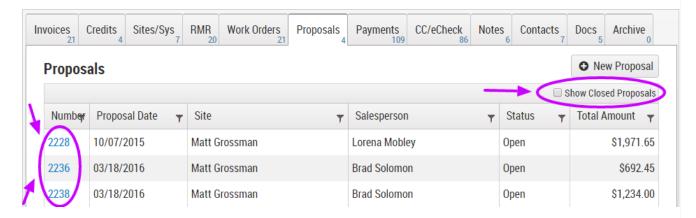
Proposal Details Page

Last Modified on 11/08/2016 9:49 pm EST

The Proposal Details Page is the homepage for each of your prospect's (or customer's) proposals.

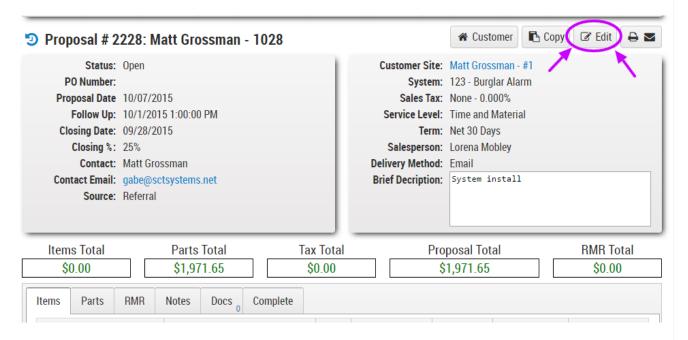
Accessing the Proposal Page

Access this page by clicking the blue number to the left of the open proposal you would like to view. Check the "Show Closed Proposals" box to view a proposal page to view "Closed", Rejected", "Revised", or "Sold" proposals



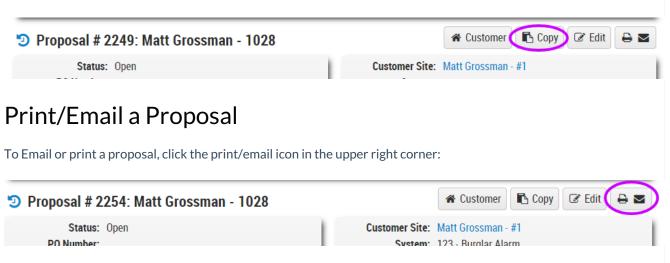
Edit Proposal Dashboard/Tabs

Here you will see a Dashboard of information and Tabs regarding the proposal. If this is not a "Sold" or "Revised" Proposal, you can edit these fields and tabs by clicking "Edit" in the upper right corner.

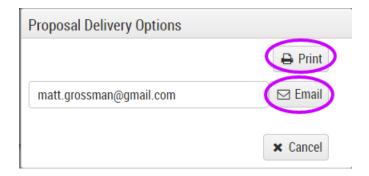


Copying a Proposal

To copy a proposal, click the "Copy" button in the upper right corner. This will change the status of the proposal to "Revised" (unless the previous status was "Sold", then the status won't change). This revised proposal can no longer be edited. The new copy will appear with a modified "Proposal Date" and a status of "Open" in the "Proposals" tab of the "Customer Manager Page".



A "Proposal Delivery Options" page will appear:



To print the proposal, click "Print" on the right side of the page. This will download a pdf of the proposal to your documents, which you can access, preview, and print

To email the proposal, enter the email address you would like to send the proposal to in the white box and click "Email" on the right side of the page. This will Send the proposal in a pdf attachment to the email address you entered along with any documents you may have attached.

View the Work Order for a Sold Proposal

This only applies to proposals with the "Status" of "Sold". Click "Work Order" in the upper right corner.

