

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

Invoices	Credits	Sites/Sys	RMR	Work Orders	Proposals	Payments	CC/eCheck	Notes	Contacts	Docs	Archive
21	4	7	20	21	4	109	86	6	7	5	0

Proposals							New Proposal
							<input type="checkbox"/> Show Closed Proposals
Number	Proposal Date	Site	Salesperson	Status	Total Amount		
2228	10/07/2015	Matt Grossman	Lorena Mobley	Open	\$1,971.65		
2236	03/18/2016	Matt Grossman	Brad Solomon	Open	\$692.45		
2238	03/18/2016	Matt Grossman	Brad Solomon	Open	\$1,234.00		

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.

Proposal # 2228: Matt Grossman - 1028

Customer Site: Matt Grossman - #1
System: 123 - Burglar Alarm
Sales Tax: None - 0.000%
Service Level: Time and Material
Term: Net 30 Days
Salesperson: Lorena Mobley
Delivery Method: Email
Brief Description: System install

Items Total	Parts Total	Tax Total	Proposal Total	RMR Total
\$0.00	\$1,971.65	\$0.00	\$1,971.65	\$0.00

Items | Parts | RMR | Notes | Docs | Complete

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".



Print/Email a Proposal

To Email or print a proposal, click the print/email icon in the upper right corner:



A "Proposal Delivery Options" page will appear:

A screenshot of the "Proposal Delivery Options" form. It has a title bar "Proposal Delivery Options". On the right side, there are two buttons: "Print" and "Email", both circled in purple. Below these buttons is a text input field containing "matt.grossman@gmail.com". At the bottom of the form is a "Cancel" button.

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.

