

Proposals Page

Last Modified on 11/07/2016 12:53 pm EST

Accessing Proposals Page

To access lists of your Open / Closed, Accepted, and Rejected Proposals at the dealer level, click "Proposals" at the top of the page:

The screenshot shows the ABC Company dashboard. At the top left is the company logo. To the right are navigation links for 'Barbie', 'Support Center', 'AlarmBill', and 'Logout'. Below these is a search bar for 'Customers' with the text 'Customer Search: name - cust #'. A main navigation bar contains several menu items: 'Customers', 'Invoices', 'Payments', 'RMR', 'Work Orders', 'Proposals' (circled in purple), 'Calendar', 'GL', 'Reports', 'Setup', and 'Accounting'. Below the navigation bar are three main sections: 'Open Receivables & Aging Past Due' with a list of aging categories and amounts; 'Notifications to Process' with a list of various metrics like 'Unassigned Mobile Payments', 'Credit Cards', etc.; and 'Top 5 RMR By Item' which includes a pie chart showing the distribution of RMR by item type.

The Proposal Page will appear:

The screenshot shows the 'Proposals' page in the ABC Company system. The 'Proposals' menu item is highlighted in the top navigation bar. In the upper right corner, there is a 'New Proposal' button. Below the navigation bar, there are three tabs: 'Open / Closed Proposals' (selected), 'Accepted Proposals', and 'Rejected Proposals'. A checkbox labeled 'Show Closed Proposals' is visible. The main content is a table with the following data:

#	Site	System Type	Salesperson	Status	Follow Up	Total Amount
2230	Lauren Connolly 25350 US Highw...	Burglar Alarm	Lorena Mobley	Open	08/06/2015	\$413.31
2240	John 6116 Benhurst Road, Tocco...	Burglar Alarm	Brad Solomon	Open	03/29/2016	\$140.95

New Proposal

To add a new proposal, click "New Proposal" in the upper right corner (hyperlink to new customer page):

Proposals

[+ New Proposal](#)

Open / Closed Proposals		Accepted Proposals	Rejected Proposals				
#	Site	System Type	Salesperson	Status	Follow Up	Total Amount	
2230	Lauren Connolly 25350 US Highw...	Burglar Alarm	Lorena Mobley	Open	08/06/2015	\$413.31	
2240	John 6116 Benhurst Road, Tocco...	Burglar Alarm	Brad Solomon	Open	03/29/2016	\$140.95	

Dealer-Level Open / Closed Proposals Tab

Click this tab to access a list of all your open proposals at the dealer.

Proposals

[+ New Proposal](#)

Open / Closed Proposals		Accepted Proposals	Rejected Proposals				
#	Site	System Type	Salesperson	Status	Follow Up	Total Amount	
2230	Lauren Connolly 25350 US Highw...	Burglar Alarm	Lorena Mobley	Open	08/06/2015	\$413.31	
2240	John 6116 Benhurst Road, Tocco...	Burglar Alarm	Brad Solomon	Open	03/29/2016	\$140.95	

The following will discuss functions within this tab.

Proposal Details Page

Click the blue "#" hyperlink to the left of the proposal to open the Proposal Details Page. This page will give you detailed information about the proposal ([Hyperlink to customer proposal page](#)):

Proposals

[+ New Proposal](#)

Open / Closed Proposals		Accepted Proposals	Rejected Proposals				
#	Site	System Type	Salesperson	Status	Follow Up	Total Amount	
2230	Lauren Connolly 25350 US Highw...	Burglar Alarm	Lorena Mobley	Open	08/06/2015	\$413.31	
2240	John 6116 Benhurst Road, Tocco...	Burglar Alarm	Brad Solomon	Open	03/29/2016	\$140.95	

Show Closed Proposals

Check the "Show Closed Proposals" box on the right side of the page to view all your closed proposals:

Proposals

[+ New Proposal](#)

Open / Closed Proposals		Accepted Proposals	Rejected Proposals				
#	Site	System Type	Salesperson	Status	Follow Up	Total Amount	<input type="checkbox"/> Show Closed Proposals
2230	Lauren Connolly 25350 US Highw...	Burglar Alarm	Lorena Mobley	Open	08/06/2015	\$413.31	
2240	John 6116 Benhurst Road, Tocco...	Burglar Alarm	Brad Solomon	Open	03/29/2016	\$140.95	

Dealer-Level Accepted and Rejected Proposals Tabs

Click the "Accepted Proposals" or "Rejected Proposals" tab to access a list of all your accepted or rejected proposals at a dealer level.

*Note: In order for a proposal to be turned into a work order its status must be "Sold".

Proposals

[+ New Proposal](#)

Open / Closed Proposals		Accepted Proposals	Rejected Proposals				
#	Site	System Type	Salesperson	Status	Follow Up	Total Amount	<input type="checkbox"/> Show Closed Proposals
2230	Lauren Connolly 25350 US Highw...	Burglar Alarm	Lorena Mobley	Open	08/06/2015	\$413.31	
2240	John 6116 Benhurst Road, Tocco...	Burglar Alarm	Brad Solomon	Open	03/29/2016	\$140.95	

The functions explained in the dealer level open / closed proposals tab apply to the dealer-level accepted and rejected proposals tabs.