# Proposal

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**Creating a New Proposal**

Once you are ready to provide a quote for the lead, the sales team can create a new proposal. This feature allows you to provide a detailed quote of the services needed by the customer.

Choose an existing lead and a sales package to start customizing the proposal. If you choose a lead with multiple sites or systems, you will be prompted to select the appropriate site or system for that proposal. You have the option of editing the contents of the package to better fit the needs of thelead. Any details entered in the description field of the proposal will also show up on the job. Also, adding “Notes” to a lead and flagging them as critical automatically prompts the tool to display a reminder about the note each time you open application. At this point, the proposal can be saved and sent to the department manager(s) for review. Once a customer accepts, change the proposal status to "Accepted" to unlock the signature field for signoff.

When you are ready to mark the proposal as "Sold", sign under the "Complete" tab and click "Complete Proposal" to save the signed proposal.

**Full View of All Proposals**

View all your proposals in one place using the Listing View (list of all proposals). Customize the Listing View by adding, removing, or grouping columns and save your custom layout by adding it as a "View" for future use. You can also easily find who you’re looking for using the search bar.

You can also view your proposals using the Kanban View. This view groups proposals by Stageusing a Kanban layout.

**eForms**

After finalizing the proposal content, you can use eForms to send the proposal to the lead for approval. eForms allows you to create a standard template or choose from your own custom proposal templates. It also gives you the convenience of collecting an electronic signature for the proposal. You can set an expiration date on the proposal and monitor the progress of each form including who has viewed the proposal or who signed off using the change history feature. Change history uses geolocation to help you capture the location of where thesignature was captured.

All of these features can be viewed in the eForms module. If you do not have eForms activated, you can use the email or print option to send the default generic proposal.