

# Proposals Tab

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The Proposals tab displays all open or completed proposals for the customer.

## Add New Proposal Button

Clicking on the Add New Proposal button will open the Proposal form to create a new proposal for the customer.

## Proposal Hyperlink

In the Number column, clicking on the hyperlink of a Proposal will open the proposal for viewing and/or editing. Users with permissions are able to make changes to the proposal and re-save, only if the proposal has not been completed.

The screenshot shows a customer profile for Emily Wood. At the top, there are buttons for 'Edit', 'Tasks', and 'History'. The profile includes a 'Customer #3719' with 'Active' and 'Normal' status, and a 'Residential-Owner' role since 3/4/22. Financial data shows a 'Total Balance Due' of \$822.71 and a 'Total RMR' of \$120.00. A 'Customer Aging' bar chart shows two bars: a green bar for 'Current' and a blue bar for '1-30 Days'. Contact information includes an address in Plymouth, MI, phone number (734) 258-4646, cell number (734) 258-3311, and email emilyLwood@gmail.com. The salesperson is Dan Brown. A 'Comments' section is also visible. Below the profile is a navigation bar with tabs for Invoices (7), Credits (2), Sites/Systems (2/3), RMR (5), Work Orders (2), Proposals (0), Payments (8), CC/eCheck, Notes (0), Contacts (2), Documents, Archive, Custom Fields, eForms, and Emails. The 'Proposals' tab is selected, showing a table with columns: Number, Proposal Date, Site, Salesperson, Status, and Total Amount. The table is currently empty with the message 'No records available.' and a pagination bar at the bottom showing '0 - 0 of 0 items' and a 'Refresh' button.