Proposals Overview

Proposals are used to list items your business wants to sell to a prospective customer or an existing customer. A proposal is comprised of one or multiple elements: Items, Inventory Parts, or RMR. You can see the costs connected to the elements within the proposal to determine the profitability for your company.

You can add a new system to the proposal. This uses the same process as adding a system to a customer site. You can edit the system from the proposal. When you mark the proposal as sold and complete and generate a work order or an invoice from the proposal, Managely adds the system to the customer.

For companies that sell grouped items regularly, you can create sales packages to reduce the amount of data entry time when creating a proposal. For more information on sales packages, navigate to Setup > Proposals > Packages.

The Proposals page has three tabs: Open/Closed tab, Accepted tab, and Rejected tab.

Open/Closed tab

This tab shows all currently open proposals. There is a button to create new proposals and a switch to show open proposals, which are shown by default, or closed proposals. The grid on this tab has these columns:

- Proposal (This is a hyperlink to the proposal details)
- Site
- System Type
- Sales Person
- Created By
- Status
- Follow Up
- Modified

There is an edit button in each row. Click this to open the proposal directly in edit mode.

Accepted tab

This tab shows all accepted proposals. The grid on this tab has these columns:

- Proposal (This is a hyperlink to the proposal details)
- Site
- System Type
- Sales Person
- Follow Up
- Total Amount

Rejected tab

This tab shows all proposals that have been rejected. The grid on this tab has these columns:

- Proposal (This is a hyperlink to the proposal details)
- Site

- System Type
- Sales Person
- Rejected Reason
- Total Amount

Approval Queue

When using the proposal approval process, admin users and users who are selected as proposal approvers (in approval rules) will see the Approval Queue tab. Proposal approvers will see the proposals they are able to review and approve. Admin users will see all proposals that have been submitted for review.