Add a Proposal using a Sales Package

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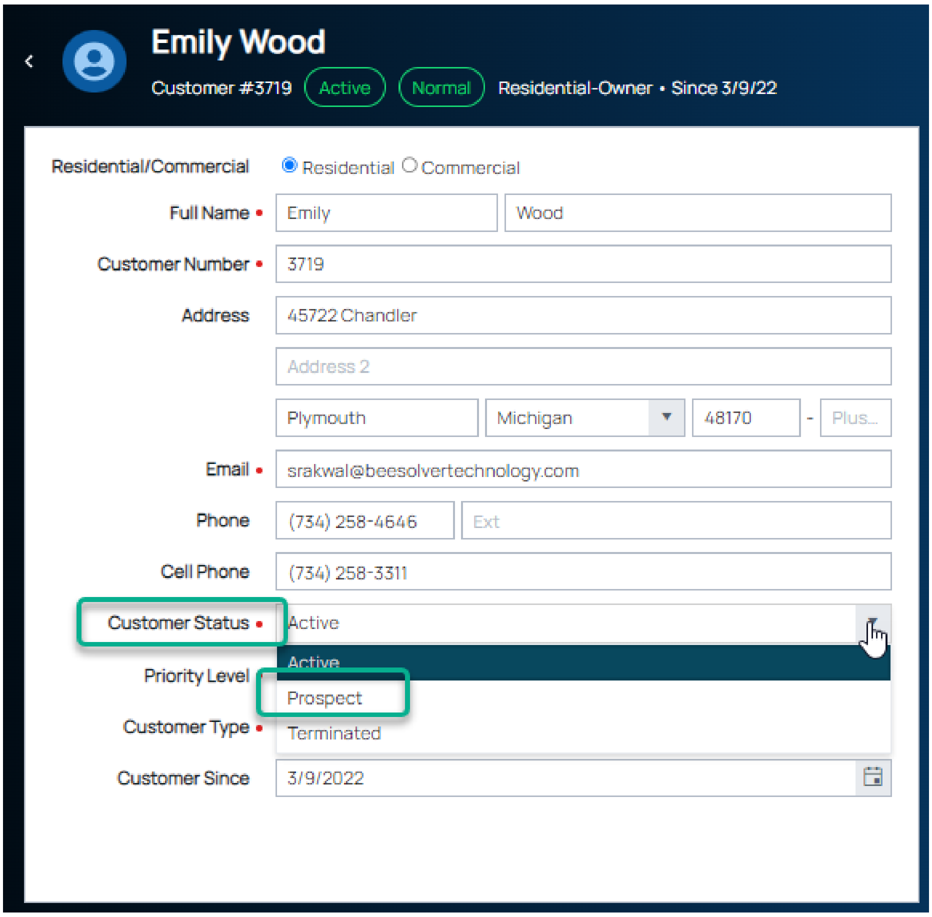
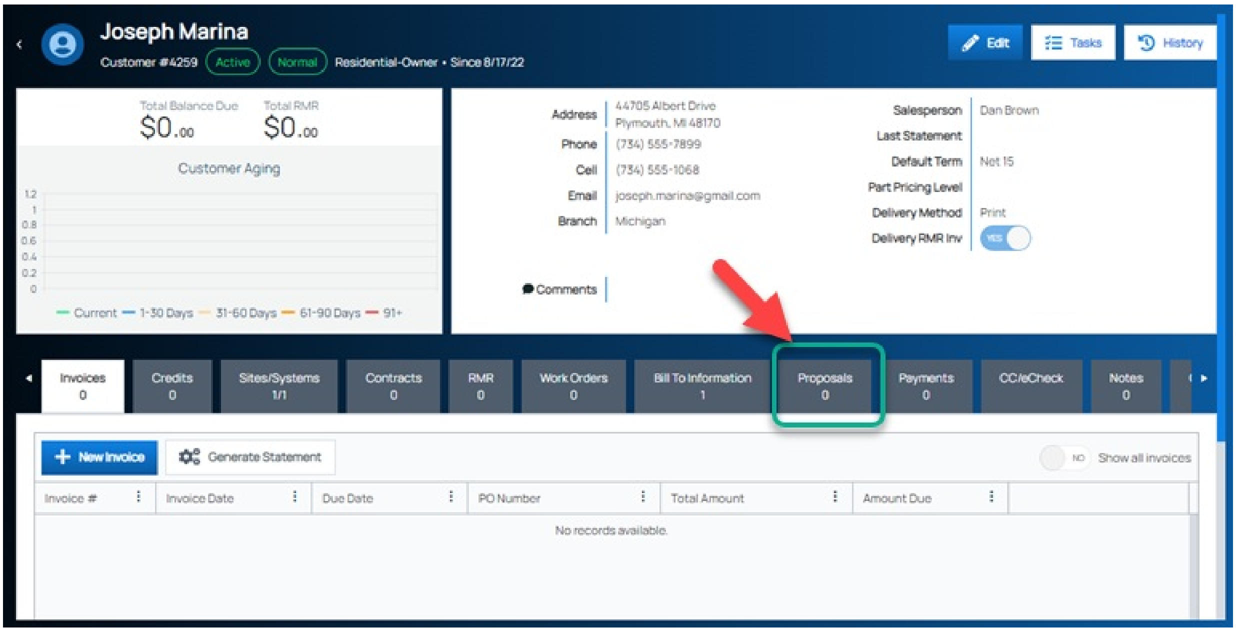
A new proposal can be created from a customer record or from the proposals list. This article addresses creating a proposal using a sales package.

Note: To be able to create a proposal for a sales lead, you must first create a customer, site, and system record, and set the **Customer Status** to Prospect. If the sales lead accepts the proposal, you can change the customer status to active.

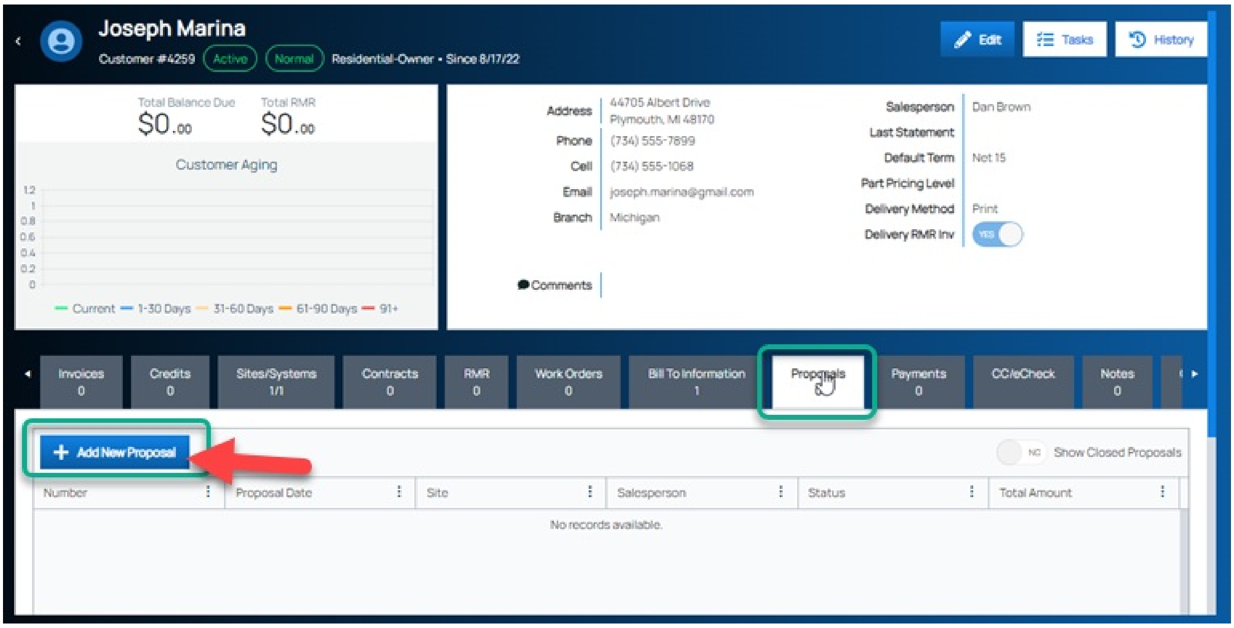


To add a new proposal, first open the customer record.

Once the customer record is open, click on the Proposals tab.



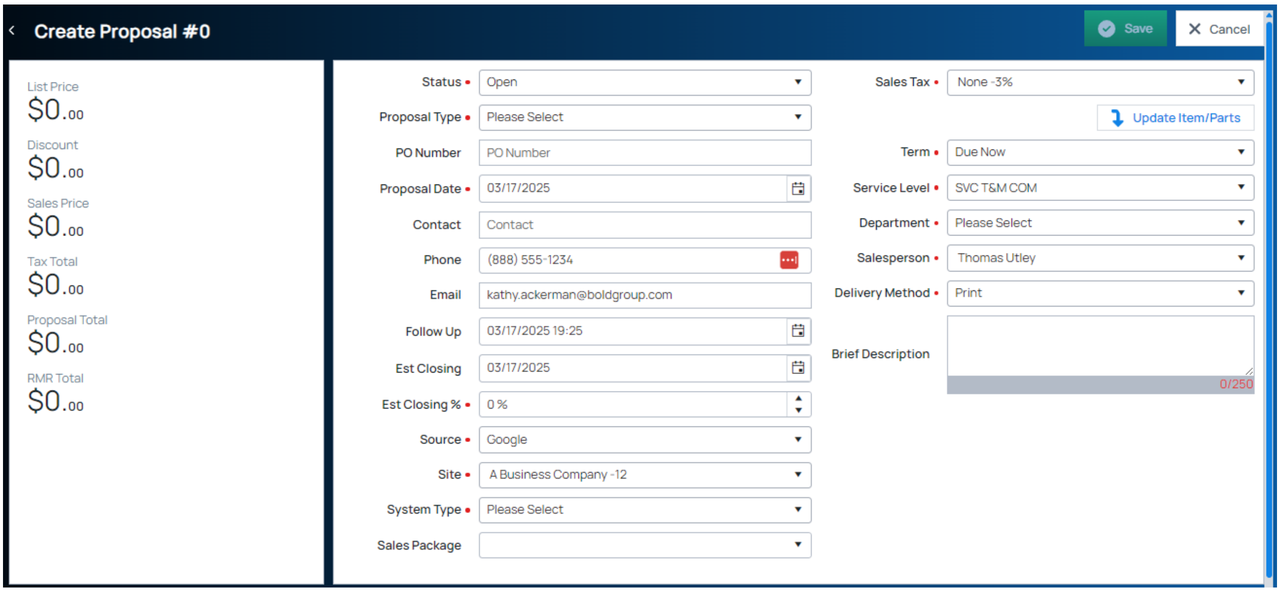
From the Proposals tab, click the **Add New Proposal** button.



Select a **Customer Site**.

The Proposal form is displayed. In the upper area of the form, make your selections in each data entry field. Required fields have a red bullet to the left of the field name. Each data entry field is described below.

Data Entry Fields



- *__Status__: Make a selection from the drop-down list. This identifies where the proposal is in your sales process.
- *__Proposal Type__: Make a selection from the drop-down list.
- **PO Number**: If your customer provides a purchase order number for billing the installation of the system, enter that value. Maximum of 50 characters.
- *__Proposal Date__: This defaults to today's date and can be changed if needed.
- **Contact**: Enter the person who is the primary contact for the proposal.
- **Phone**: Enter a phone number for the contact.
- **Email**: Enter an email address for the contact. If you will be emailing the proposal (delivery method), this is a required field.
- **Follow Up**: Enter a date to follow up with the customer.
- **Est Closing**: Enter an estimated closing date for the proposal.
- *__Est Closing %__: Enter an estimated closing percent.
- *__Source__: Choose the source for the lead. These come from Setup > Proposal > Marketing Sources.
- *__Site__: This defaults from the source chosen when creating the proposal.
- *__System Type__: Choose a system type. These come from Setup > Other > System Types.
- **Sales Package**: If needed, choose a sales package. These come from Setup> Proposals > Packages
- *__Sales Tax__: Choose the correct sales tax for the site.
- *__Term__:
- *__Service Level__:
- *__Department__:
- *__Salesperson__:
- *__Delivery Method__:
- **Brief Description**:

Data entry fields preceded with an asterisk are required.