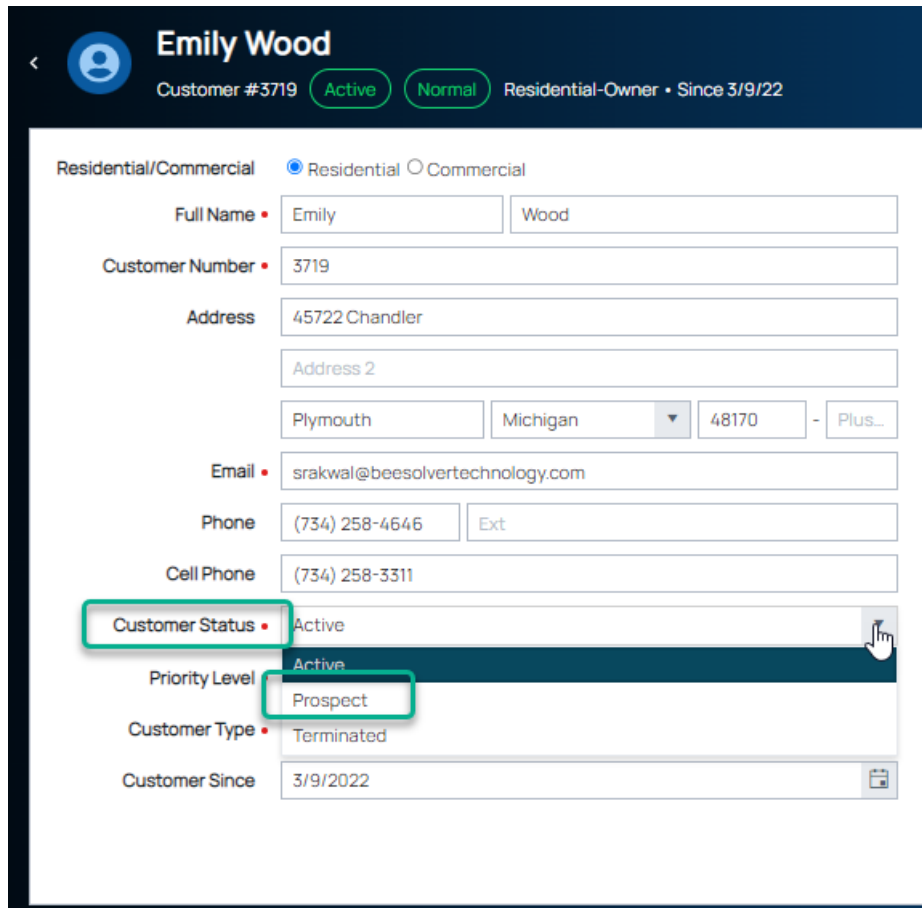


# Add a Proposal using a Sales Package

Last Modified on 03/19/2025 10:19 am EDT

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.



The screenshot shows a customer record for Emily Wood. The record includes fields for Full Name, Customer Number, Address, Email, Phone, Cell Phone, Customer Status, Priority Level, Customer Type, and Customer Since. A dropdown menu is open for the Customer Status field, showing options: Active, Prospect, and Terminated. The 'Prospect' option is highlighted with a green box. A hand cursor is pointing at the dropdown arrow.

Field	Value
Residential/Commercial	<input checked="" type="radio"/> Residential <input type="radio"/> Commercial
Full Name	Emily Wood
Customer Number	3719
Address	45722 Chandler
Address 2	
City	Plymouth
State	Michigan
Zip	48170
Plus...	
Email	srakwal@beesolvertechnology.com
Phone	(734) 258-4646
Ext	
Cell Phone	(734) 258-3311
Customer Status	Active
Priority Level	Active
Customer Type	Terminated
Customer Since	3/9/2022

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

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

Joseph Marina  
Customer #4259 Active Normal Residential-Owner • Since 8/17/22

Total Balance Due: \$0.00  
Total RMR: \$0.00

Customer Aging

Address: 44705 Albert Drive, Plymouth, MI 48170  
Phone: (734) 555-7899  
Cell: (734) 555-1068  
Email: joseph.marina@gmail.com  
Branch: Michigan

Salesperson: Dan Brown  
Last Statement: Net 15  
Default Term: Net 15  
Part Pricing Level: Print  
Delivery Method: YES  
Delivery RMR Inv: YES

Proposals: 0

+ New Invoice | Generate Statement

Invoice #	Invoice Date	Due Date	PO Number	Total Amount	Amount Due
No records available.					

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

Joseph Marina  
Customer #4259 Active Normal Residential-Owner • Since 8/17/22

Total Balance Due: \$0.00  
Total RMR: \$0.00

Customer Aging

Address: 44705 Albert Drive, Plymouth, MI 48170  
Phone: (734) 555-7899  
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Default Term: Net 15  
Part Pricing Level: Print  
Delivery Method: YES  
Delivery RMR Inv: YES

Proposals: 0

+ Add New Proposal

Number	Proposal Date	Site	Salesperson	Status	Total Amount
No records available.					

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.