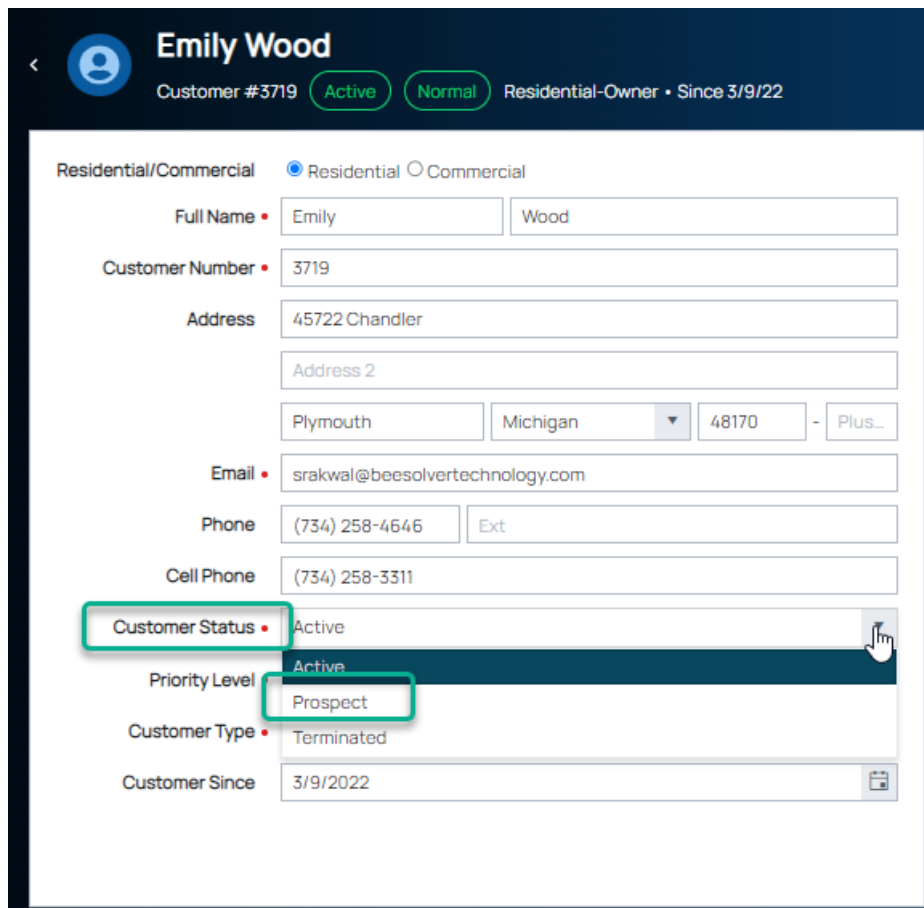


Add a Proposal using a Sales Package

Last Modified on 09/13/2024 11:58 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 form for Emily Wood. The form includes fields for Full Name, Customer Number, Address, Email, Phone, Cell Phone, Customer Status, Priority Level, Customer Type, and Customer Since. The Customer Status dropdown menu is open, showing 'Active' as the current selection and 'Prospect' as the selected option. A hand cursor is pointing at the 'Prospect' option.

Emily Wood
Customer #3719 **Active** **Normal** Residential-Owner • Since 3/9/22

Residential/Commercial Residential Commercial

Full Name • Emily Wood

Customer Number • 3719

Address • 45722 Chandler
Address 2

Plymouth Michigan 48170 - Plus...

Email • srakwal@beesolvertechnology.com

Phone • (734) 258-4646 Ext

Cell Phone • (734) 258-3311

Customer Status • Active
Active
Prospect

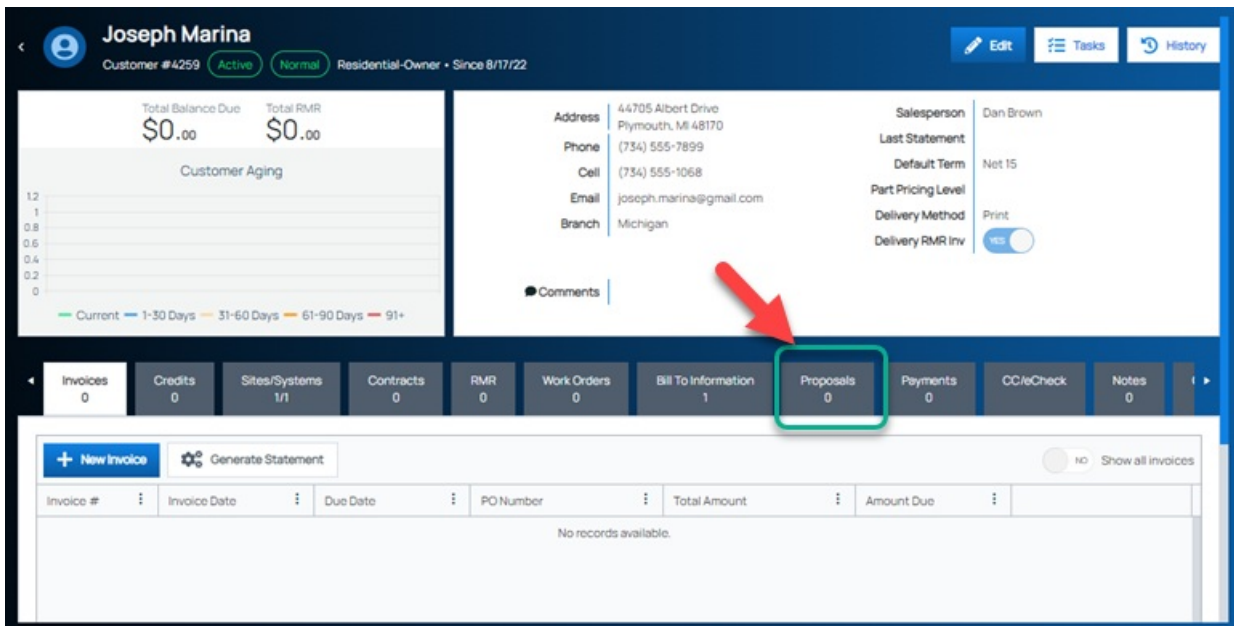
Priority Level • Active

Customer Type • Terminated

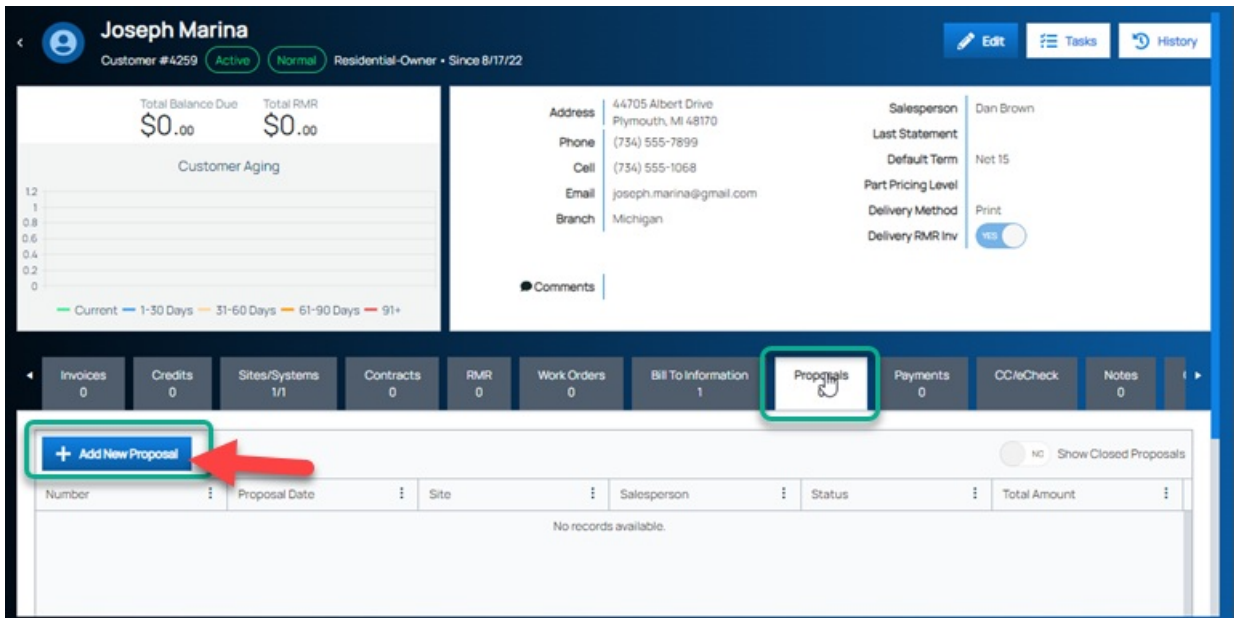
Customer Since • 3/9/2022

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

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



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



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

< Create Proposal #0 Save Cancel

Hide Details

<p>List Price \$0.00</p> <p>Discount \$0.00</p> <p>Sales Price \$0.00</p> <p>Tax Total \$0.00</p> <p>Proposal Total \$0.00</p> <p>RMR Total \$0.00</p>	<p>Status • Please Select</p> <p>Proposal Type • Please Select</p> <p>PO Number PO Number</p> <p>Proposal Date • 08/17/2022</p> <p>Contact Contact</p> <p>Phone (734) 555-7899</p> <p>Email joseph.marina@gmail.com</p> <p>Follow Up 08/17/2022 14:43</p> <p>Est Closing 08/17/2022</p> <p>Est Closing % • 0 %</p> <p>Source • Google</p>	<p>Site • Joseph Marina -1</p> <p>System</p> <p>System Type • Please Select</p> <p>Sales Package</p> <p>Sales Tax • None -0%</p> <p style="text-align: right;">Update Item/Parts</p> <p>Term • Net 15</p> <p>Service Level • Please Select</p> <p>Salesperson • Kathy Ackerman</p> <p>Delivery Method • Print</p> <p>Brief Description 0/250</p>
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- ***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
- **Est Closing:**
- ***Est Closing %:**
- **Source:**
- ***Site:**
- **System:**
- ***System Type:**
- **Sales Package:**
- ***Sales Tax:**
- ***Term:**
- ***Service Level:**
- ***Salesperson:**
- ***Delivery Method:**
- **Brief Description:**

Data entry fields preceded with an asterisk are required.