

Department Linking for Proposals

Last Modified on 11/01/2024 4:16 pm EDT

On the Proposals page (CRM > Proposals), we added the Department field. Use this to link the proposal to a department. Proposals linked to a department that has an approval rule will go through the approval rule process.

The screenshot shows the 'Create Proposal #0' form with the following fields and values:

Field	Value
List Price	\$0.00
Discount	\$0.00
Sales Price	\$0.00
Tax Total	\$0.00
Proposal Total	\$0.00
RMR Total	\$0.00
Status	Open
Est Closing %	0 %
Department	Please Select
Proposal Type	Please Select
Source	Google
Salesperson	1 Unassigned
PO Number	PO Number
Site	Site 1 ABC (commercial) -1
Delivery Method	Email
Proposal Date	08/19/2024
System Type	Please Select
Brief Description	
Contact	Contact
Sales Package	
Sales Tax	None -3%
Phone	() - -
Email	stephen.fisher@boldgroup.com
Follow Up	08/19/2024 20:03
Term	Net 15
Est Closing	08/19/2024
Service Level	SVC T&M COM