

Proposal Items

Last Modified on 12/16/2024 5:11 pm EST

You can add items to a proposal when creating the proposal or when editing an existing proposal. If you are using approval rules, changing a proposal can send the proposal through the approval process again.

To add items to a proposal, click the Items tab.

Click the **Add Items** button. This opens the Add Items popup, which shows the items that you can select.

Select the checkbox to the left of each item to add.

Click the **Add Items** button at the bottom of the popup.

To edit item details, click the item row in the Items grid. This opens the Edit Proposal Item form:

Edit Proposal Item : Installation Fee ✕

Item Description • Installation of Security System

System

Sales Tax Code • None

Taxable? NO

Quantity •

Rate •

Amount \$0.00

Item Cost

Total Cost \$0.00

Labor Units •

Total Labor 0