

Proposal Items

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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:

The screenshot shows a form titled "Edit Proposal Item : Install Labor-Taxable" with a close button (X) in the top right corner. The form contains the following fields and controls:

- Item Description**: Text input field containing "Installation Labor".
- System**: Dropdown menu.
- Zone**: Dropdown menu.
- Location**: Text input field.
- Sales Tax Code**: Dropdown menu containing "MI".
- Taxable?**: Toggle switch currently set to "YES".
- Quantity**: Spin box containing "1".
- Rate**: Spin box containing "\$0.00".
- Amount**: Text label showing "\$0.00".
- Item Cost**: Spin box containing "\$0.00".
- Total Cost**: Text label showing "\$0.00".
- Labor Units**: Spin box containing "0".
- Total Labor**: Text label showing "0".

At the bottom of the form, there are two buttons: a blue "OK" button with a checkmark icon and a white "Cancel" button with an X icon.