Proposal Details

Last Modified on 10/30/2025 3:35 pm EDT

The proposal detail page has two panels at the top. The one on the left shows the values and cost. The one on the right shows basic information added when the proposal was created.

Edit the proposal to change any of this information:

- Status
- Proposal Type
- PO Number
- Proposal Date
- Contact
- Phone
- Email
- Follow Up
- Est Closing
- Est Closing %
- Source
- Site
- System Type
- Sales Package
- Sales Tax
- Term
- Service Level
- Salesperson
- Delivery Method
- Brief Description

The tabs on the proposal show an overview and more details.

Overview tab

This tab shows labor, discount, commission, and deposit details. Edit the proposal to add or change these. A table shows the summary of the sales price, total cost, profit, commissions, deposit amount, and RMR.

Hours tab

This tab shows the items that have been added. Edit the proposal to add, delete, duplicate, or change the order of items in the grid.

Parts tab

This tab shows the parts that have been added. Edit the proposal to add, delete, duplicate, or change the order of parts in the grid.

Part Kits tab

This tab shows the part kits that have been added. Edit the proposal to add, edit, and delete part kits in the grid.

Systems tab

This tab shows the systems that have been added. Edit the proposal to add, edit, and delete systems in the grid.

Charges tab

This tab shows the current charges that come from items. You can group charges and they will appear grouped when the proposal is printed. When grouping charges, you can choose to display subtotals for the groups.

Tax tab

This tab shows the taxes on the proposal. These come from the proposal header and any linked taxes.

RMR tab

This tab shows any added RMR. Edit the proposal to add, edit, and delete RMR in the grid.

Notes tab

This tab shows any notes. Edit the proposal to add, edit, and delete notes.

Documents tab

This tab shows any documents attached to the proposal. Edit the proposal to upload or remove any documents.

Complete tab

Use for customer signature to complete the proposal.

Custom Fields tab

This tab shows any custom fields. These come from Setup > Operations > Custom Fields > Estimate Entity.

eForms tab

This tab shows and eForms added to the proposal.