Create and Send a Proposal

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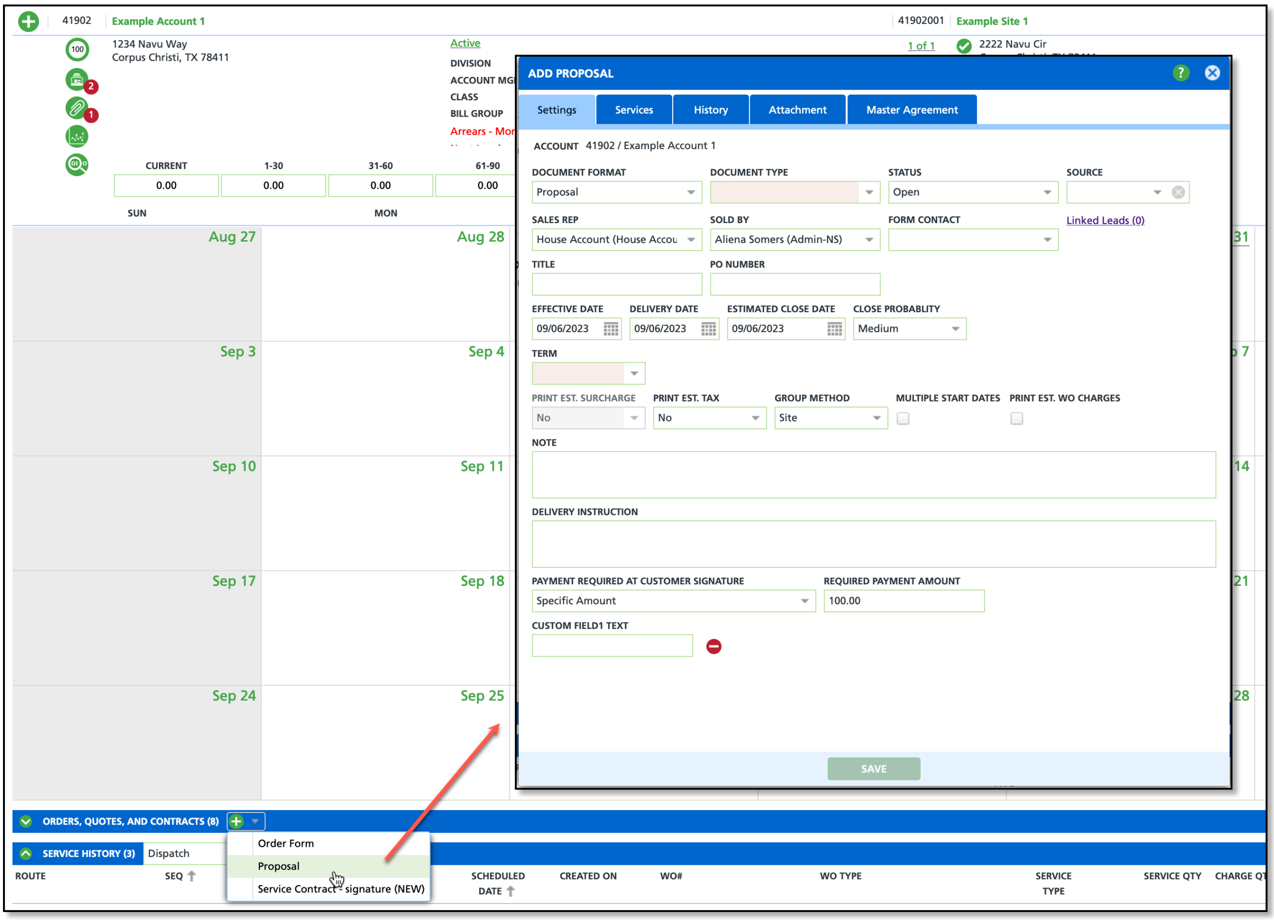
Pathway: *Accounts > Search > Account (Customer Service Screen) > Orders, Quotes and Contracts*

This article details the Add Proposal form available in the *Orders, Quotes and Contracts* section of a site. Proposals are created for a variety or reasons (rate changes, service changes, new services, etc.) and are available to both active and prospect accounts. After a proposal is issued, it is tracked in the following sales CRM tools:

- Sales Pipeline Summary
- Sales Pipeline Opportunities

Add Proposal: Settings

The Settings tab establishes the basics of the document and qualifies it as either an 'Opportunity' or 'Quote'. Because a proposal document does not include a signature section it is considered an opportunity and tracked in the Pipeline Opportunities dashboard using the 'Proposal' filter.



Field Descriptions

Field	Description
Document Format	Identifies the document's format and determines how/where it will be tracked in the Sales Pipeline CRM tools. Form Format setup is located in *Setup > Document Formats > Format.*

<table>
<tr><td>Document Type</td><td>Indicates a reason code for the proposal.
Example: Change In Service, New Business, Increase in Service, etc.

Document Type setup is located in Setup > Document Formats > Type.</td></tr>
<tr><td>Status</td><td>Indicates the current status of the proposal and will automatically update if the proposal is sent, viewed or signed in the system. Status options include:

Open
Applies once a proposal is created.
'Open' status allows for edits to fields in the Settings tab.
Submitted to Client
Displays after the proposal has been emailed from the system to the customer or prospect.
'Submitted to Client' status allows for edits to fields in the Settings tab.
Sold
Displays once a signature has been received for the Agreement via a browser link. If the proposal was printed and signed, the status must be manually updated to sold and the signed agreement uploaded as a PDF.
When the status is marked as Sold, and no signed PDF exists, an attachment button displays to attach the signed pdf to.
'Sold' status prevents edits to fields in the Settings and Services tabs.
Void
Select Void to indicate the proposal was created in error.
'Void' status prevents edits to fields in the Settings tab.
Lost
Select Lost to indicate the proposal was lost (i.e. went with a competitor).
'Lost' status prevents edits to fields in the Settings tab.
</td></tr>
<tr><td>Source</td><td>Indicates how the sale originated (referral, internal, employee, and etc.).</td></tr>
<tr><td>Sales Rep</td><td>Identifies the sales representative responsible for the proposal or agreement. Form notifications, dashboard tracking and credit for a sale/approval are sent to the sales representative selected.</td></tr>
<tr><td>Sold By</td><td>Identifies who made the sale. Provides flexibility to record who made the sale if it was someone other than the sales representative.</td></tr>
<tr><td>Form Contact</td><td>Identifies the account contact the proposal/agreement will be sent to. Account Contacts must be created first or they will not display as a drop down selection.

Related Article: Add Account Contact</td></tr>
<tr><td>Linked Leads</td><td>Option to link an existing lead service to the proposal/agreement. Linked leads reduces double entry by allowing a user to copy services from the lead to the quote.

*Important - Leads will continue to populate in the Sales Pipeline - Leads dashboard until linked. Linking to a document closes the lead.

Related Articles: Add a Lead; Pipeline Leads</td></tr>
<tr><td>Title</td><td>Option to enter the title for the Form Contact.</td></tr>
<tr><td>PO Number</td><td>Option to enter a PO number if one exists.</td></tr>
</table>

Effective Date	The date proposed services and billing will begin.
Delivery Date	Indicates the customer’s preferred date to receive service equipment.
Estimated Close Date	The expected date the sale will close and drives the Sales Pipeline Opportunities dashboard.
Close Probability	Probability of a successful sale (identified by the sales representative).
Term	The initial term length of the service agreement.
Renewal Term	Indicates the automatic renewal term length.
Note	Notes added here display in the Comments section of the proposal.
Delivery Instruction	Internal note that displays on the delivery work order for the driver to see and does not appear on additional service work orders.
Custom Field1 Text	Open field to print additional information not otherwise included on the proposal. Field name can be customized in *Setup > Document Format > Formats (Settings tab).*

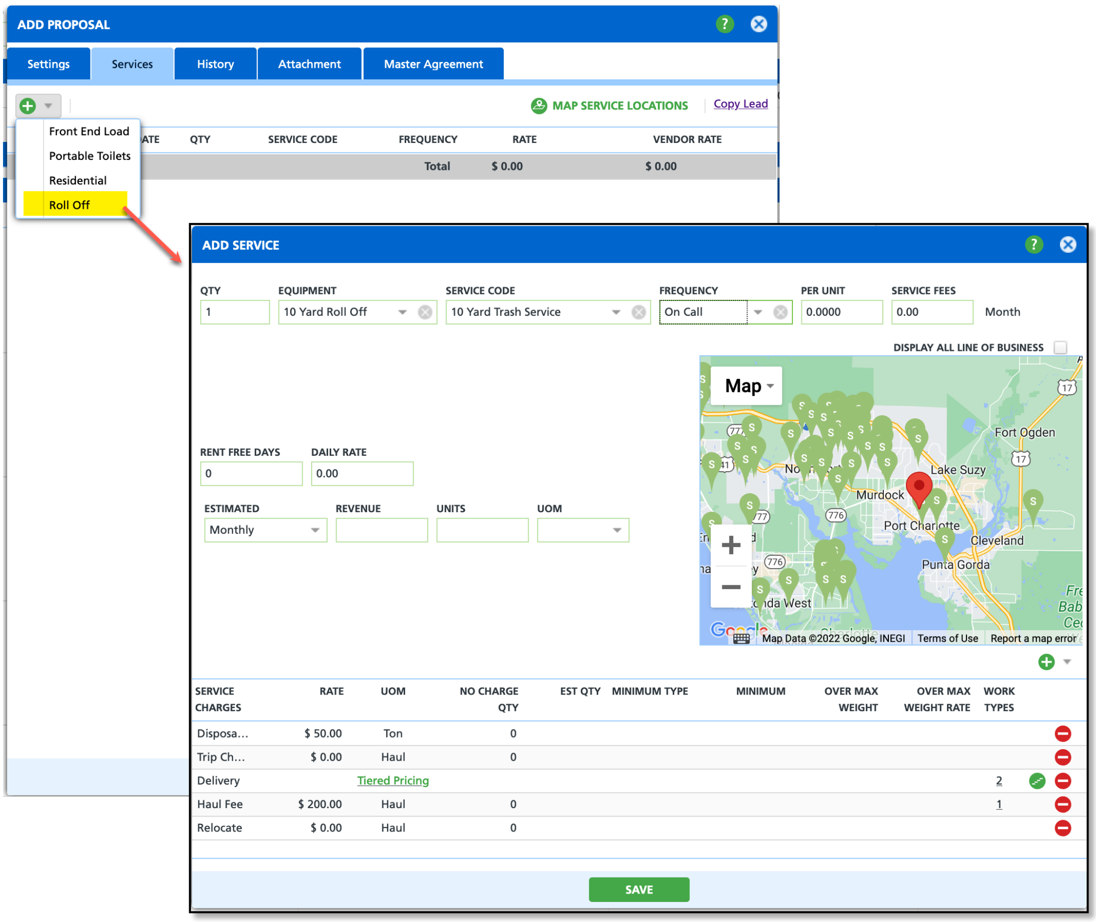
Payment Required at Customer Signature
(Applies to contracts)
	Option to require a deposit for services to begin. If a payment is required, the contract can not be saved until payment has been collected using either a bank account or Credit Card. Payment requirement options include:
	• **Not Required (default)**
	    ◦ Customer and Sales Rep can sign the contract without collection of a deposit.
	• **Specific Amount**
	    ◦ Upon signing, the customer will be required to enter a payment using either a bank account or credit card. If selected, a "Required Payment Amount" field is displayed to enter the required amount.
	• **One Month Recurring Fees Including Taxes and Surcharges**
	    ◦ System calculated based on service rates, and the taxes and surcharges that apply.
	• **One Month Recurring Fees**
	    ◦ System calculated based on the service rates.

Print Est. Surcharge	Option to display estimated surcharges on the printed proposal. Surcharge group must be assigned to site prior to adding services to the proposal or service agreement. To re-calculate the estimated surcharges the service rate must be updated or removed and re-added to the form.
Print Est. Tax	Option to print the estimated tax on the proposal. Service fees must be entered on the Services tab to calculate.
Group Method	Option to group services/charges on the proposal by Site, Line of Business (LOB) or Material.
Multiple Start Dates	Allows the user to define a unique start date for each service added to the form and is primarily used for broker agreements and not a regular sales proposal.

Print Est WO Charges	Option to include the (estimated) work order charges on the proposal.

Add Proposal: Services

The Services tab identifies the service(s) and additional charges the proposal includes. Services are entered in one of two ways, copied from a lead or, manually added.



Add Service

1. Click the **green '+'** icon from the Services screen.
2. Select the Line of Business the service is for.
3. Enter a **Quantity** amount for the equipment.
4. Select the **Equipment** the service requires.
5. Select the **Service Code**.
6. Select the **Frequency** the site will be serviced.
7. Enter a rate in the **Per Unit** field. The amount entered here will be multiplied against the value entered in the QTY field to calculate the Service Fees.
8. Optional: if a daily inactivity rental fee applies to the equipment, enter it in the**Daily Rate** field.

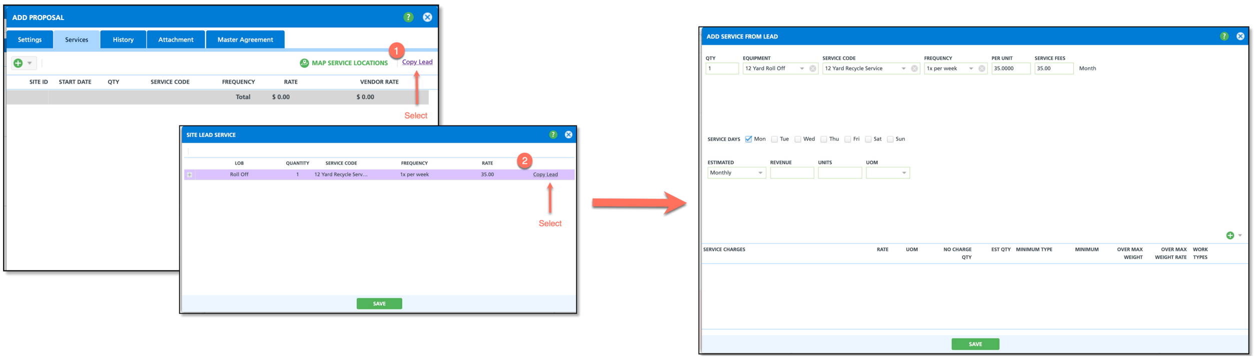
Add Service Charges

Add additional rates in the Service Charges section for anything the customer may call in and request. The account is only charged when the added service is used.

1. Select the **green '+'** icon displayed below the service map.
2. Select the service charge you would like to add.
3. Click within the **Rate** column of the service charge line item to enter a rate for the service.

Copy Lead

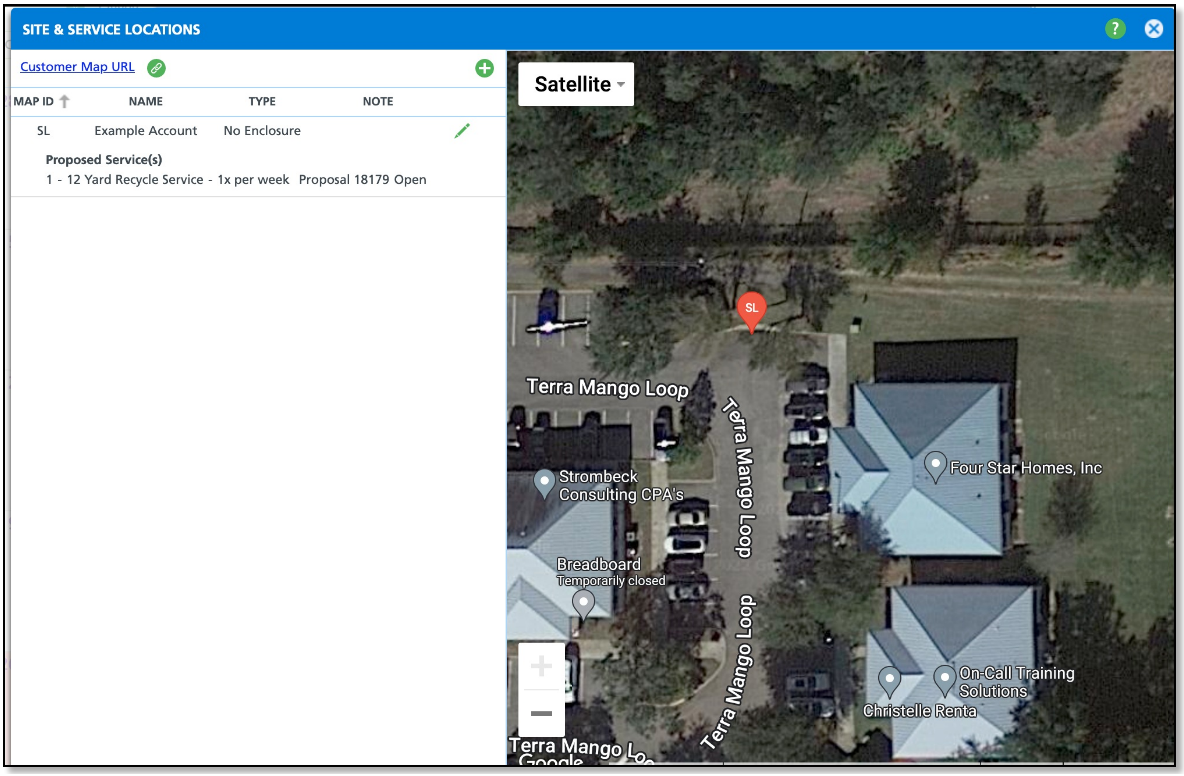
If a lead was previously created for the account, and the service recorded in the lead matches the service proposal, select **Copy Lead** to auto-fill the fields in the Add Service screen.



1. Select **Copy Lead** from the Services tab of the Add Proposal screen.
2. Review the service(s) displayed in the customer service 'Lead Service' screen and select **Copy Lead link** for the service you would like copied. Upon selection, the 'Add Service From Lead' screen will open.
3. Review the service information copied into the 'Add Service From Lead' screen and edit and/or complete additional fields as needed.
4. Select **Save** when finished.

Map Service Locations

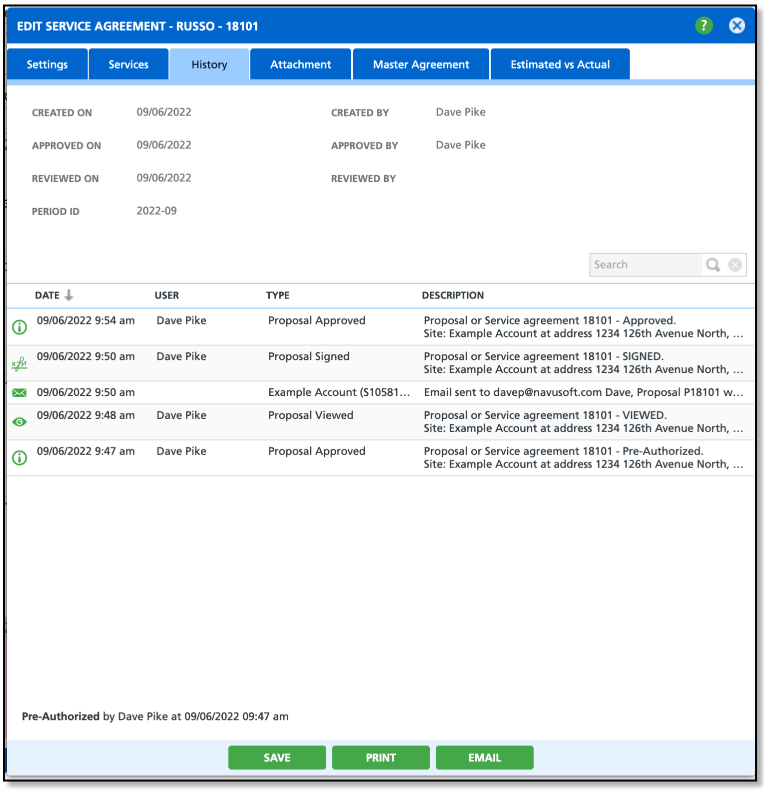
Select 'Map Service Locations' to display a Satellite or Map view of the sites included in the proposal.
When the map opens, a location pin displays over each site. If needed, use the drag and drop feature to relocate a site's pin to the approximate location the site should be serviced from. For example, if the service container is located on the west side of the parking lot, drag and drop the pin in that location to direct the driver where to go.



Add Proposal: History

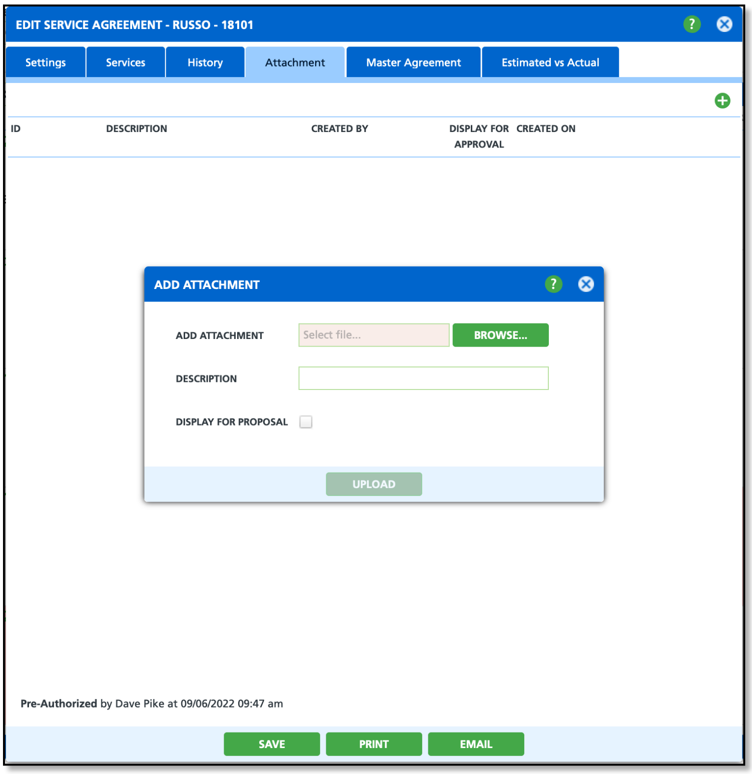
The History tab provides a log of actions performed on a document, ensuring full transparency and accountability. It captures key activities such as:

- Email history
- Each instance the form was viewed
- The date the form was approved
- The signature date an agreement was signed
- The date a Proposal Expiration alert was issued. Alert notifications are issued 90 days from, 60 days from, 30 days from and day of expiration.



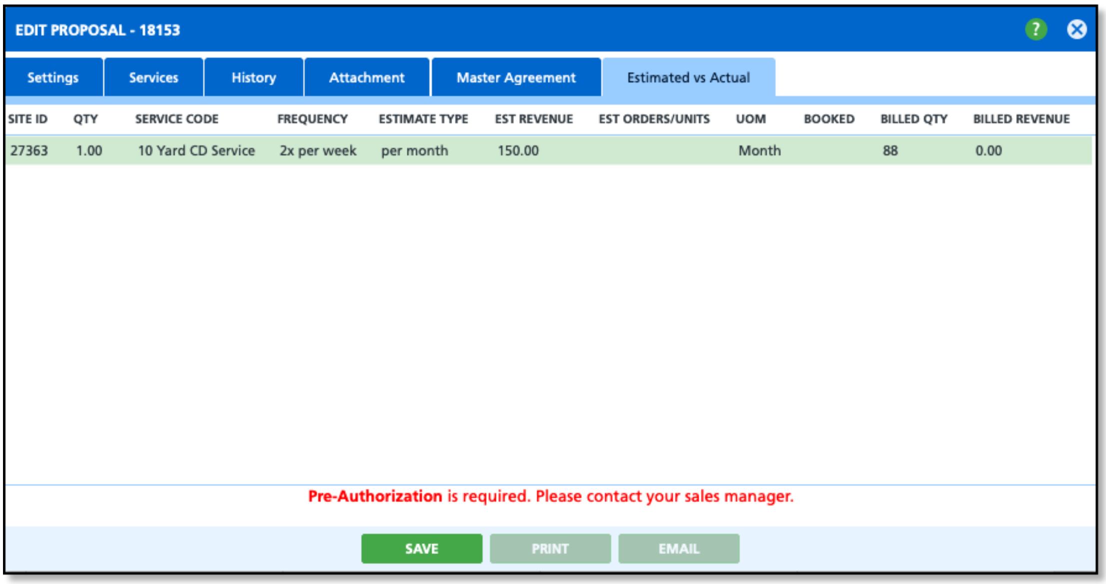
Add Proposal: Attachment

Use the Attachments tab to attach and save PDF documents with the proposal. Select 'Display for Proposal' if the attachment should be displayed with the proposal when printed or emailed.



Add Proposal: Estimated vs Actual

The Estimated vs Actual tab displays a service's estimated revenue compared to the actual revenue calculated when service begins. By default, this tab does not display unless enabled in Service Code Setup.



Field Descriptions

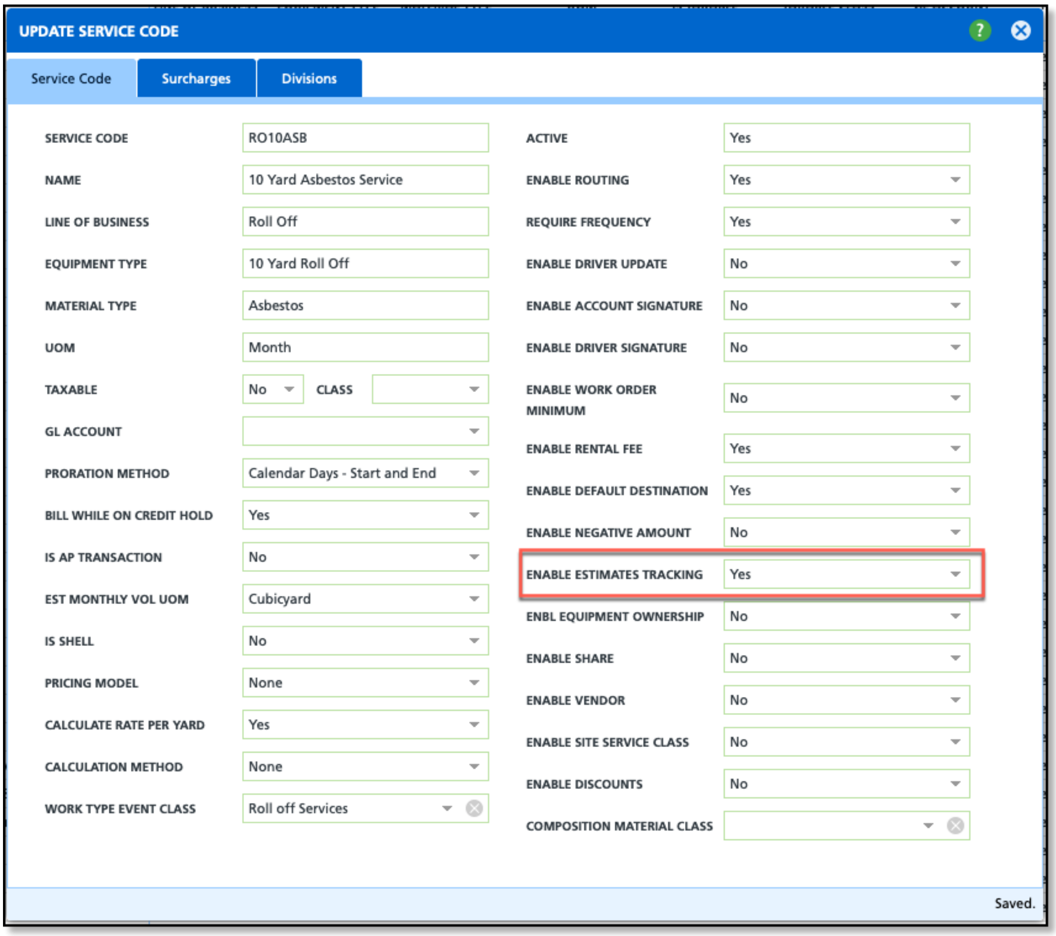
Field	Description
Estimate Type	Displays the selection made in the 'Estimated' field when the service was added in the Services tab.
Est Revenue	Displays the value entered in the 'Revenue' field when the service was added in the Services tab.

Est Orders/Units	Displays the value entered in the 'Units' field when the service was added in the Services tab.
UOM	Displays the UOM (Unit of Measure) selected in the 'UOM' field when the service was added in the Services tab.
Booked	
Billed Qty	
Billed Revenue	

Enable the Estimated vs Actual Tab

Pathway: *Setup > Services > Service Code*

The Estimated vs Actual tab will only display if the proposal includes at least one service code where *Enable Estimates Tracking* is set to 'Yes'. Otherwise, the tab will be hidden from view. By default, the Enable Estimates Tracking field is set to 'No' in Service Code setup.

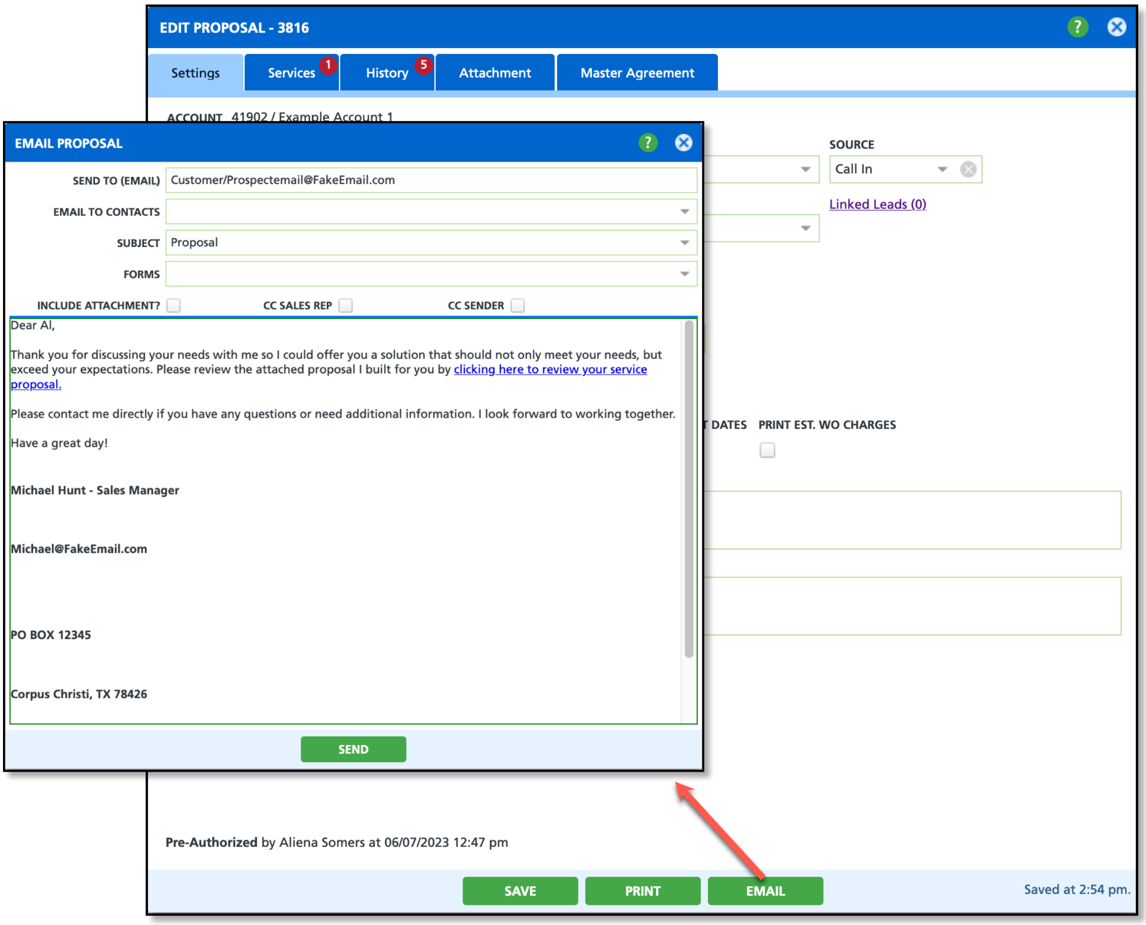


Send Proposal

After the proposal has been created, email it directly to the customer for review and approval.

Send Proposal

Once the customer has opened the proposal, the sales representative will receive a blue notification indicating it has been viewed.

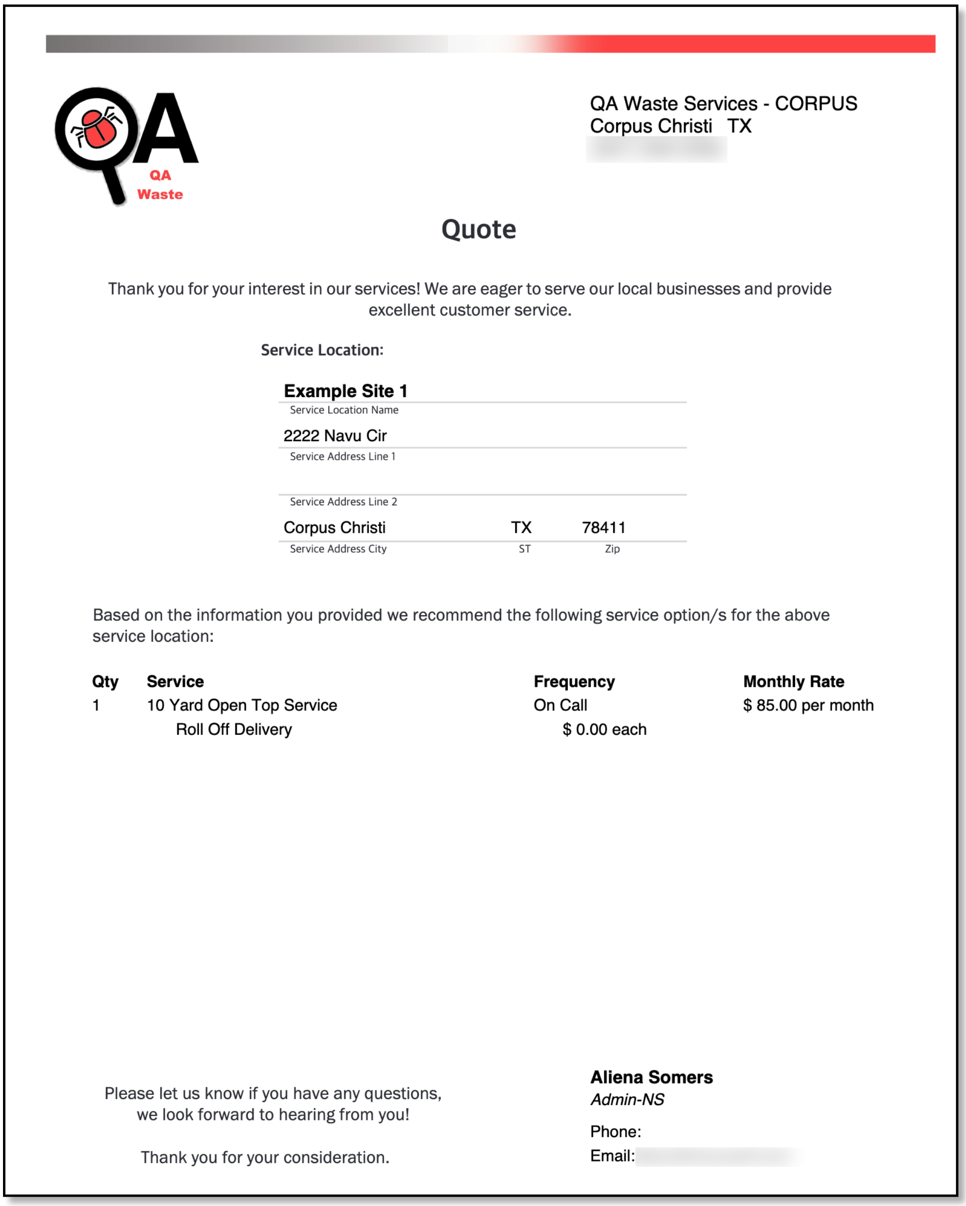


Email Proposal

1. Enter the email address of the person the proposal should be reviewed by in the **Send to (Email)** field if they are not listed as a contact in the "Email To Contacts" drop-down; otherwise, select a contact from the drop down.
2. Select an email template from the **Subject** drop down. This will populate the message in the Body section of the email.
3. Select to **Forms** drop down to add a form such as a Cancellation Policy or anything else you would like a customer to have along with the proposal.
4. Review the body of the email message and edit as needed. Click **Send** when the proposal is ready to be sent.

Proposal Example

The following is an example of a printed or emailed proposal. Proposals will vary dependent on your template setup.



QA Waste

QA Waste Services - CORPUS
Corpus Christi TX

Quote

Thank you for your interest in our services! We are eager to serve our local businesses and provide excellent customer service.

Service Location:

Example Site 1
Service Location Name

2222 Navu Cir
Service Address Line 1

Service Address Line 2

Corpus Christi	TX	78411
Service Address City	ST	Zip

Based on the information you provided we recommend the following service option/s for the above service location:

Qty	Service	Frequency	Monthly Rate
1	10 Yard Open Top Service	On Call	$ 85.00 per month
	Roll Off Delivery	$ 0.00 each	

Please let us know if you have any questions,
we look forward to hearing from you!

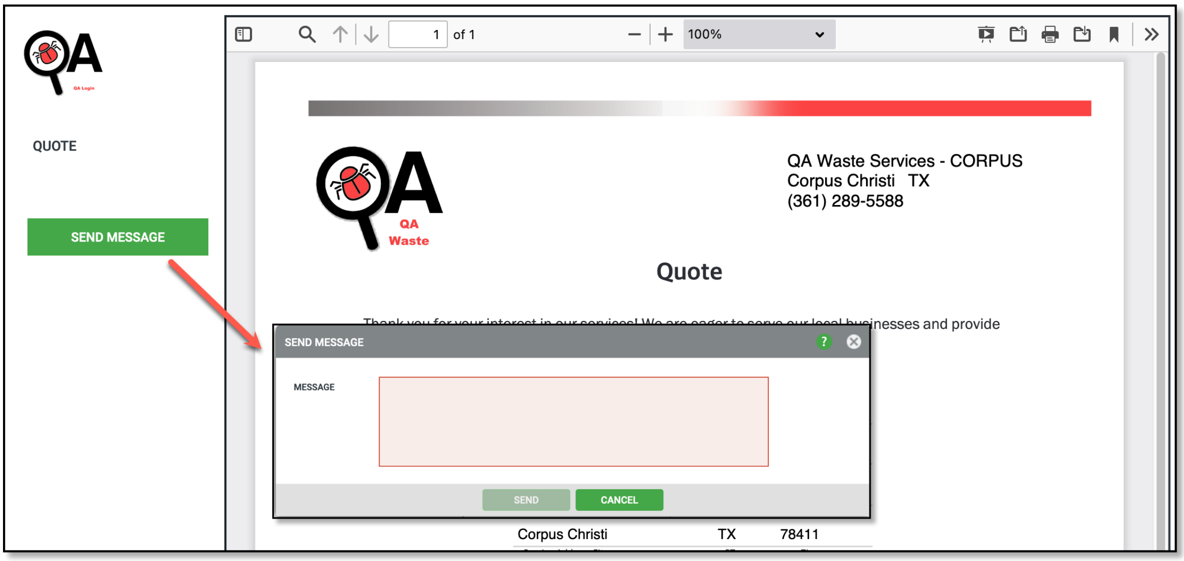
Thank you for your consideration.

Aliena Somers
Admin-NS

Phone:
Email:

Customer Option: Send Message

Upon receiving an electronic version of the proposal, customers can choose to send a message to the assigned sales representative. Once a message is sent, the sales rep will be notified with a blue notification containing the message. The message will also display in their Recent Activities and on the Customer Service screen. Sales reps are not able to message the customer back using the same process and must use an alternative means of communication.



Related Articles

This article is related to the Sales CRM Workflow that includes the following process:

- Create Prospect Accounts and Leads
- Proposals and Service Contracts
- Manage Sales Pipelines and Followups
- Closing a Sale and Lost Sales
- Next Steps - Servicing Hand-Off