

Managing Proposals

Learn how to assign and manage 'Proposals' in the Customer Relationship Management Application.

With the Proposals Section you can:

Assign a Proposal to an employee.

Outline the goals and objectives of the Proposal.

Record Probability and Revenue Potential.

Within the 'Proposals' section you can:

- Assign a proposal to a specific employee.
- Outline the goals and objectives of the proposal for that employee.
- And record the probability and revenue potential that will enable you to prepare for a pipeline forecast.

List Maintenance Import Contacts

Proposals <<

- All Proposals
- New Business
- New Business
- Addition to Existing Business

Tasks

Contacts

Leads

Notes

Transactions

Reports

Events

Marketing Campaigns

Proposals

+ Add New

Subject	Subject	Subject	Subject	Expected
New Proposal	New Request	New Business	\$10,000.00	3/11/201

Then select to create a new proposal.

Select the 'Proposals' tab.

Begin by selecting the 'Proposals' tab, then select 'Add New' to create a new proposal.

Proposal - Untitled

Save and Close Assign Proposal to Contact Cancel

Click to 'Assign a Contact'.


Proposal Detail

Assigned Tasks

Notes


Proposal:

Owner: Alex Sherman Date Recorded:

Assigned Contact  Name:
E-Mail:
Phone:

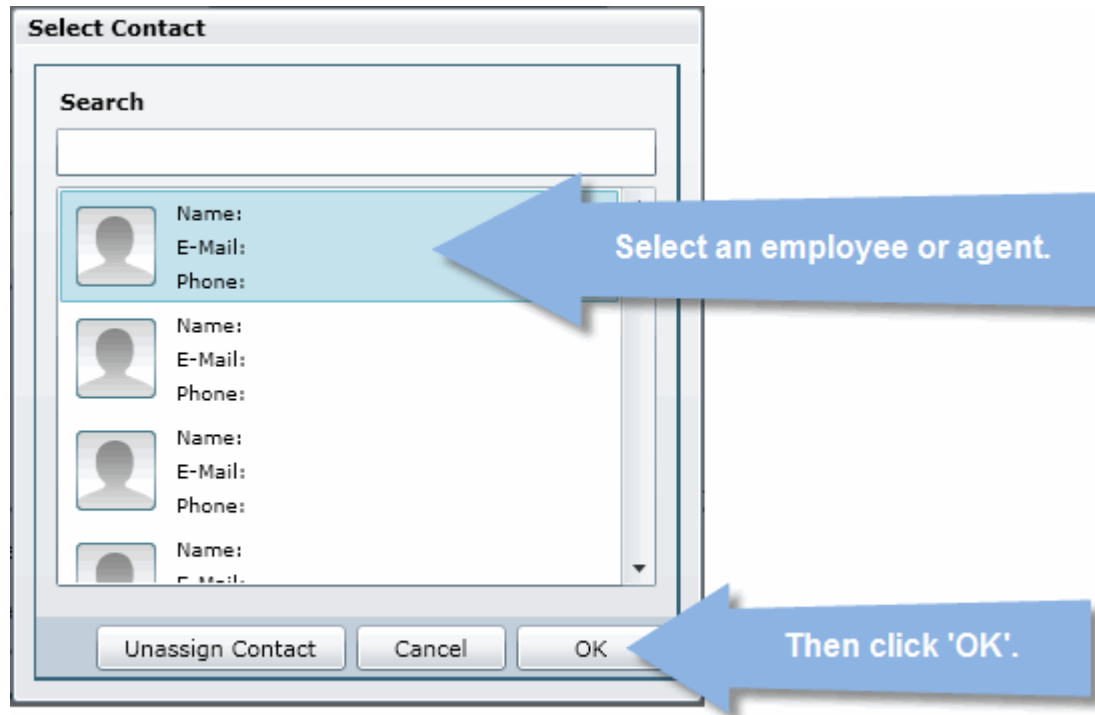
Status: Type:

Description:

Expected Close Date:  15 Source:

Revenue Potential: Probability:

You may assign a particular Proposal to a specific 'Contact', such as an employee or agent by clicking on the 'Assign Proposal to Contact' button.

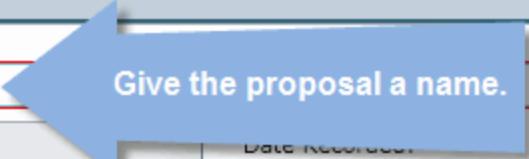


Then select a contact that you would like to assign the 'Proposal' to and click 'OK' to save.


Proposal - Untitled ☒

Save and Close | Assign Proposal to Contact | Cancel

Proposal Detail

Proposal: 

Owner: **Date Received:**

Assigned Contact  **Name:**
E-Mail:
Phone:

Status: **Type:**

Description:

Expected Close Date: **Source:**

Revenue Potential: **Probability:**

Next, give the proposal a name.

Proposal - Untitled

Save and Close Assign Proposal to Contact Cancel


Proposal Detail

Assigned Tasks

Notes

Proposal: New Proposal

Owner: Alex Sherman Date Recorded:

Assigned Contact:  Name: E-Mail: Phone:

Status: Type:

Description:

Expected Close Date: Source:

Revenue Potential: Probability:

Status Options:

- New Request
- Identifying Decision Makers
- Documenting Prospect Needs
- Estimates Underway
- Proposal Delivered
- Negotiating
- Sale Completed
- Sale Lost to Competitor
- Sale Lost - Prospect Cancelled

Type Options:

- New Business
- New Business
- Addition to Existing Business

Then select a 'Status'.

And a Proposal 'Type'.

Then you may select the current status that the proposal is in, as well as a 'Proposal Type'. If none of the options for 'Status' or 'Type' fit your needs, you are able to edit and add these values through the 'Admin' tab under 'Maintenance'.

Proposal - Untitled [Close] [Maximize]

Save and Close Assign Proposal to Contact Cancel

Proposal Detail

Assigned Tasks

Notes

Proposal: New Proposal

Owner: Alex Sherman Date Recorded:

Assigned Contact: [Profile Icon] Name: E-Mail: Phone:

Status: New Request Type: New Business

Description: Add a description here.

Expected Close Date: 3/11/2010 [Calendar Icon]

Revenue Potential: \$10,000.00 Probability: [Dropdown]

- 90% +
- 75% +
- 50% +
- 25% +
- less than 25%

The screenshot shows a software window titled "Proposal - Untitled" with a toolbar containing "Save and Close", "Assign Proposal to Contact", and "Cancel". The main area is divided into sections: "Proposal Detail", "Assigned Tasks", and "Notes". The "Proposal Detail" section contains several input fields and dropdown menus. Blue arrows are overlaid on the form, pointing to the "Description" field (labeled "Add a description here."), the "Expected Close Date" field (labeled "Select a 'Date'"), the "Revenue Potential" field (labeled "Give a 'Revenue Potential'"), and the "Probability" dropdown menu (labeled "Then select a 'Probability'"). The "Probability" dropdown is open, showing options: "90% +", "75% +", "50% +", "25% +", and "less than 25%".

Then you may give a description if necessary in the area shown. Next, be sure to select an 'Expected Close Date', and an estimated 'Revenue' potential that the prospect may bring if the proposal is accepted. Then be sure to select the probability that the 'Proposal' will turn into a contract.

Proposal - Untitled

Save and Close Cancel


Proposal Detail

Assigned Tasks

Notes

Proposal: New Proposal

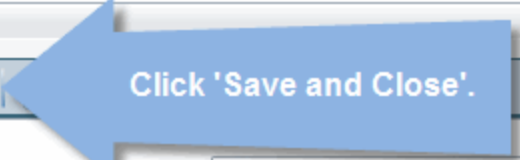
Owner: Alex Sherman Date Recorded:

Assigned Contact  Name:
E-Mail:
Phone:

Status: New Request Type: New Business

Description: Add a description here.

Expected Close Date: 3/11/2010 Source:
Revenue Potential: \$10,000.00 Probability:



After you have finished completing the 'Details' section, click 'Save and Close' to save.

The screenshot displays a software interface with a toolbar at the top containing buttons for 'Add New', 'Search', 'Action', 'Multi-Edit Form', and 'Grid Columns'. On the right side of the toolbar, it indicates 'Total Records: 1'. Below the toolbar is a table with columns labeled 'Subject', 'Type', 'Revenue Potential', 'Event Location', 'Event Date', and 'Event Description'. A blue callout arrow points from the text 'Double click the Proposal or select here to view details.' to a 'View Details' button located in the first row of the table.

Your 'Proposal' will then appear in your list of proposals. To add or edit information to an existing event, you may select the 'View Details' button to continue.


Proposal Form: New Proposal

Save and Close Assign Proposal to Contact Delete Record Cancel

Proposal Detail

Subject: New Proposal Date Recorded: 3/9/2010

Assigned Tasks

Assigned Contact:  Name: E-Mail: Phone:

Status: New Request Type: New Business

Description: Add a description here.

Expected Close Date: 3/11/2010 Source:

Revenue Potential: \$10,000.00 Probability: 50% +

Notes

Or add specific notes.

Assigns tasks.

You may also assign tasks to an employee for this proposal, or add specific notes.