fibreCRM | HEART OF THE PRACTICE

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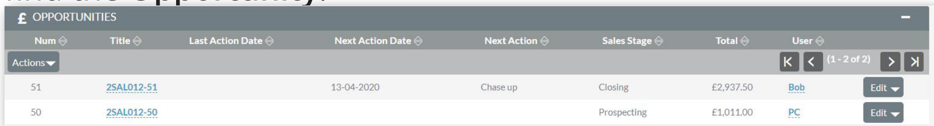
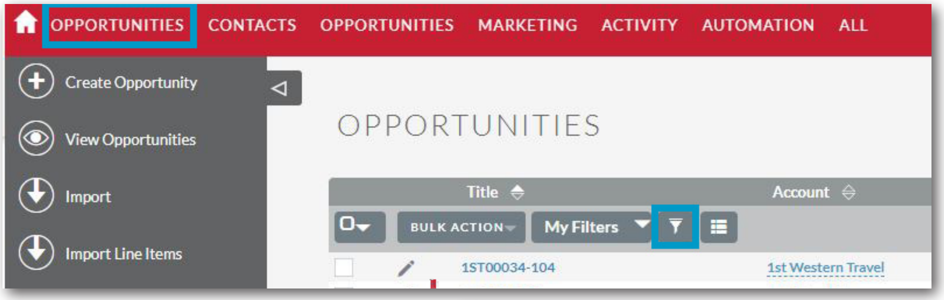
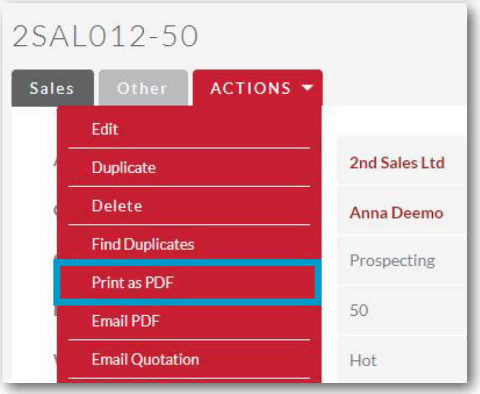
Creating a Proposal

1. To create a **Proposal**, select the **Opportunity** record for the client you wish to send the Proposal to. You can do this by navigating the relevant **Person/Organsation** record and scrolling to the **Opportunities Subpanel OR** by navigating to the **Opportunities Module** and using the **Search Filter** to find the **Opportunity**.

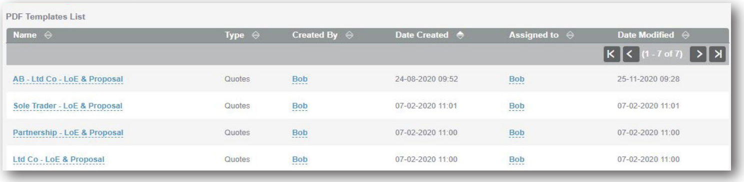




2. In the **Opportunity** record select the **Print as PDF** option in the **Actions Menu.**

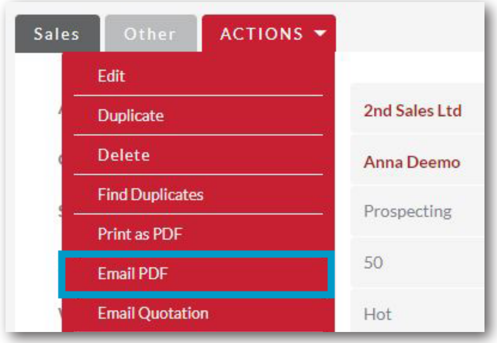


3. In the pop up box, select the relevant **Proposal Template** in the **PDF Template list.**



4. The **Proposal** will then be downloaded to your desktop. Check over the **Proposal** and make sure the information such as line items have been pulled over from the **Opportunity** correctly.

5. When you're ready to send select the **Email PDF** option in the **Actions Menu.**



6. In the pop up box select the same template as you did in **Step 3** in the **PDF template** drop down menu. Also select the **Email Template** and if the recipient is the **Organisation** or **Person** associated with the **Opportunity.** Once done select **Send Email.**