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**.

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51	25AL012-51		13-04-2020	Chase up	Closing	£2,937.50	Bob	Edit -
50	25AL012-50				Prospecting	£1,011.00	PC	Edit 🔫
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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**.

Name \ominus					Date Modified \ominus
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AB - Ltd Co - LoE & Proposal	Quotes	Bob	24-08-2020 09:52	Bob	25-11-2020 09:28
Sole Trader - LoE & Proposal	Quotes	Bob	07-02-2020 11:01	Bob	07-02-2020 11:01
Partnership - LoE & Proposal	Quotes	Bob	07-02-2020 11:00	Bob	07-02-2020 11:00
Ltd Co - LoE & Proposal	Quotes	Bob	07-02-2020 11:00	Bob	07-02-2020 11:00



Sales	Other ACTIONS -	
	Edit	
4	Duplicate	2nd Sales Ltd
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	Find Duplicates	Prospecting
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	Email PDF	50
	Email Quotation	Hot

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.

Quick2Em								
From Email:	Default - A&B Accts (bob.smart@go.fibrecrm.net) 🔻 Signature: Select a signature to appe							
PDF Template	- Select PDF Template -							
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	Dear Anna,							
	Please find below our tender document for your purposes. As you will hopefully see from the following pages, Andrews & Brown will be able to assist you in all your accounting, tax and compliance needs whilst							
	offering the advice and professionalism in order to grow your business in the future. We pride ourselves on our expertise and ability to work to the needs of our clients in a partner-led environment. If you have any further questions relating to Andrews & Brown or the tender please don't hesitate							
	We prote outserves on our expense and aduity to work to the needs of our clients in a partner-led environment, in you have any ourner questions relating to volotevis & brown or the tender prease on it hesitate to contact me.							
	Should you have any questions please do get in touch.							
	Kind regards.							