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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/Organisation record and scrolling to the Opportunities Subpanel OR by navigating to the Opportunities Module and using the Search Filter to find the Opportunity.

Num	Title	Last Action Date	Next Action Date	Next Action	Sales Stage	Total	User
51	2SAL012-51		13-04-2020	Chase up	Closing	£2,937.50	Bob
50	2SAL012-50				Prospecting	£1,011.00	PC

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.

Name	Type	Created By	Date Created	Assigned to	Date Modified
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

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.

SERVICES	Qty	FEES/MONTH
Bookkeeping	1	1,116.00
Net Total		0.00
VAT		0.00
Gross Total		0.00

SERVICES	Qty	FEES/MONTH
Accounts	1	1,011.00
Net Total		1,011.00
VAT		0.00
Gross Total		1,011.00

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.