fibrecrm HEART OF THE PRACTICE

Visit **support.fibrecrm.com** for more info or contact your CRM Manager

Create Proposal with E-Signing

1 You can also send out a • Proposal with E-Signing via the CRM so your client can approve a quote and that approval will go straight back into the CRM. To do this navigate to the Opportunity that the Proposal will be sent to and in the Actions Menu select the Send Proposal option.

Other ACTIONS -	
Edit	
Duplicate	Fibrecrm Limited
Delete	Rosie Hill
Find Duplicates	Prospecting
Print as PDF	
Email PDF	10
View Change Log	
Close as Won	
Create Engagement Letter	
Send Proposal	
Create Deferred Opportunity	-

2. In the **Pop Up** box you can select the who the **Proposal** will go to. You can also select a **Brand** and an **Email Template** which will automatically fill the **Email Subject** and **Body**. The **PDF Template** field is where you can select the **Proposal** the client will receive. Select **Preview** to view that **Proposal**. Once you're happy with everything Click **Send Email**.

Person	Rosie Hill	Organisation	Fibreom Umited
iend To: *	rosie hill@fbrecm.com (Primary)	Email Template: *	Proposal Signature
PDF Template: •	Quote Bottom Border	Brand: *	LoE Brand sample Domo
imall Subject: •	Signature Request		
Email Body: *	File - Edit - View - Insert - Format - Tools - Table -		
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	Dear Rosa,	Proposal Sfl_proposals_	
	Deer Rose. Thate your vectory COMPWYNANCE as your accounters and business abidiors. As discussed p soger corps for mis shall be can aller look. Click.there for we and sight the Poposal	Proposal Sfi_proposals_ lease find attached ou	Proposal which outlines the work you have instructed us to do. Prease would you read through this and return a
	Deer Rome, Thank you for settleding COMPANYIAWI as your accountents and bosiness abitions. As discussed pr appropriot opty time to half we can set and volue. Collections for www and sign the Proposal Wind Seconds III proposals secondr	Proposal Sfi_proposals_ lease find attached ou	Proposal which natives the work you have instructed us to do. Prease would you read through this and return a
	Deer Pose. Thans you for them to full deer as your accountents and business advices. As discussed progress only to receive that we can start work. Click.teer to view and signitie Proposal Xind Regards If Lgroposals_sender Disk is an annumbre Ital/201	Proposal Sti_proposals_	Propertial which outlines the work you have instructed us to do. Prease woold you need through this and return a

3. Next you'll be taken back to the **Opportunity**. In there the **Proposal Status** field will updated to **Sent**. You can also scroll down the **Proposal Subpanel** in the Opportunity where you can view the **Status** of the **Proposal**.

Proposal Signing 000015 - Fibresom Limited Sent	_
4. Once the email has been sent your customer will then receive an email containing a link to the Proposal for them to view	QUOTATION Fibreorn Linited
and sign.	I have read and
	Type your name

can view or download a copy of the **Proposal** with the **Digital Acceptance Information**.



5. Opportunity and Subpanel will update automatically to Viewed. If they then accept the Proposal the status will automatically update to Accepted, the Accepted Date will also be added. If your client declines this will also automatically update the status as well. In the Proposal Subpanel the name of the Proposal is hyperlinked and selecting it will take you to the Proposal Record.



6. In the Proposal Record you can view information regarding the Proposal such as; Proposal Status, the Accepted Name, Accepted Date and the IP Address of the signer of the Proposal. In the Proposal PDF field you

BASIC Proposal AC	TIONS -		
Name:	Proposal Signing 000015 - Fibrecrm Limited	Proposal Status:	Accepted Digitally
Organisation:	Fibrecrm Limited	Person:	Rosie Hill
Opportunity:	000015 - Fibrerm Limited	Sender:	Fibre Administrator
Accepted Name:	Rosie Hill	Accepted date:	16/09/2022 11:19
Decline Reason:		Declined date:	
URL:	https://tempdex/hbrecrm.cloud//ProposalPortal/index.php?id=6418c7cc-3a1c- fb0e-9ebb-63243e11c7c0	URL expiry date:	07/10/2022 11:16
PDF Template:	Quote Bottom Border	Brand:	LoE Brand sample Demo
IP Address:	172.31.45.7	Assigned to:	FibreCRM
Created By:	FibreCRM	Date Created:	16/09/2022 10:16
Modified By Name:	FibreCRM	Date Modified:	16/09/2022 11:19
Proposal PDF:	Proposal Signing 000015 - Fibrecrm Limited.pdf 📄 🛃	Browser Info:	
Send To:	raria hil@fbrarrm.com		