

# Proposals

Last Modified on 07/27/2023 9:56 am EDT

## Proposals

Menu path: Proposals > Listing View or Kanban View

This lists the new proposal created from a successfully saved Quick Quote and those created by the New Proposal menu option or added from an existing lead.

The list line has a hyperlink to open the proposal.

The proposal contains the information from the Quick Quote.

The values that default from System Defaults include Delivery Method, System Type, Term, Sales Tax, Marketing Source, and Proposal Type.

A user can edit or delete the proposal. If the proposal is deleted, the corresponding miscellaneous appointment (if any) is also deleted.

### Proposals Listing View

#	Site	System Type	Salesperson	Created By	Status	Follow Up	Modified	Total Amount
1090	Charles Mast 44245 Erik Pass, Plymouth	Intrusion	Carolyn Johnson	Carolyn Johnson	Open	03/02/2022	03/02/2022	\$1,482.94
1091	Charles Mast 44245 Erik Pass, Plymouth	Intrusion	Carolyn Johnson	Carolyn Johnson	Open	03/03/2022	03/02/2022	\$1,482.94
1092	Charles Mast 44245 Erik Pass, Plymouth	Intrusion	Carolyn Johnson	Carolyn Johnson	Open	03/03/2022	03/02/2022	\$1,482.94
1093	Charles Mast 44245 Erik Pass, Plymouth	Intrusion	Carolyn Johnson	Carolyn Johnson	Open	03/03/2022	03/02/2022	\$1,482.94
1094	Water Beck 44225 Albert Pass, Plymouth	Intrusion	Carolyn Johnson	Carolyn Johnson	Open	03/03/2022	03/02/2022	\$1,164.94
1095	Grace Chapman 10229 Erik Pass, Plymouth	Intrusion	Carolyn Johnson	Carolyn Johnson	Open	03/02/2022	03/02/2022	\$1,164.94
1096	Gloria Franklin 36528 Erik, Plymouth	Intrusion	Carolyn Johnson	Carolyn Johnson	Open	03/02/2022	03/02/2022	\$1,164.94
1097	April Cunningham 105 N Main, Plymouth	Intrusion	Carolyn Johnson	Carolyn Johnson	Open	03/02/2022	03/02/2022	\$1,164.94
1099	Matt Jones 419 N Main, Plymouth	Intrusion	Carolyn Johnson	Carolyn Johnson	Open	03/07/2022	03/05/2022	\$1,590.00
1100	Matthew Jones Sr, 410 N Main, Plymouth	Intrusion	Carolyn Johnson	Carolyn Johnson	Open	03/05/2022	03/05/2022	\$1,590.00

### Proposals Kanban View

Open	Pending	Sold	Accepted
<p>1051: Mattson Fisher 9033 Main Street, Plymouth Proposal Date: 11/02/2021 Follow Up Date: 11/02/2021 Closing Date: 11/02/2021 System Type: Intrusion Salesperson: Oliver Elias Amount: \$1,268.90 RM#: 348.00</p>	<p>1025: Angela Atkins 216 Little Brook Ct, Cleveland Proposal Date: 11/17/2021 Follow Up Date: 11/17/2021 Closing Date: 11/17/2021 System Type: Intrusion Salesperson: Erick Stacker Amount: \$195.59 RM#: 50.00</p>	<p>1076: Aema 1000 Middle Street, Lansing Proposal Date: 2/10/2022 Follow Up Date: 2/10/2022 Closing Date: 2/10/2022 System Type: C&amp;I Salesperson: Erick Stacker Amount: \$10.60 RM#: 50.00</p>	<p>1041: Aema 1000 Middle Street, Lansing Proposal Date: 12/18/2021 Follow Up Date: 12/18/2021 Closing Date: 12/18/2021 System Type: C&amp;I Salesperson: Erick Stacker Amount: \$60.43 RM#: 30.00</p>
<p>1052: Mattson Fisher 9033 Main Street, Plymouth Proposal Date: 11/02/2021 Follow Up Date: 11/02/2021 Closing Date: 11/02/2021 System Type: CCTV Salesperson: Oliver Elias Amount: \$0.00 RM#: 30.00</p>	<p>1031: Ninja Sotgi 9155 Connecticut Ave, Cleveland Proposal Date: 12/02/2021 Follow Up Date: 12/02/2021 Closing Date: 12/02/2021 System Type: A New System Salesperson: Erick Stacker Amount: \$69.45 RM#: 50.00</p>		<p>1047: Angela Atkins 216 Little Brook Ct, Cleveland Proposal Date: 12/18/2021 Follow Up Date: 12/18/2021 Closing Date: 12/18/2021 System Type: Intrusion Salesperson: Erick Stacker Amount: \$100.00 RM#: 30.00</p>
<p>1050: Aema 1000 Middle Street, Lansing Proposal Date: 12/1/2022 Follow Up Date: 12/1/2022</p>	<p>1040: Angela Atkins 216 Little Brook Ct, Cleveland Proposal Date: 12/02/2021 Follow Up Date: 12/02/2021</p>		<p>1052: Christina Brinkley 123 Main St, Cleveland Proposal Date: 1/28/2022 Follow Up Date: 1/28/2022</p>

