Chapter 3: Proposals

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What are Proposals?

A *Proposal* is a quote that your organization can create for a job or a service requested by your prospects, and customers. Dolibarr ERP/CRM lets you create, process, and store Proposals all in one place.

Creating new Proposals

You can create new Proposals in Dolibarr ERP/CRM.

Create a new Proposal

1. Click **Commerce.**

2. Click **New Proposal** from the Commercial proposal side menu.

   New commercial proposal form is displayed. See “New commercial proposal form” on page 12.

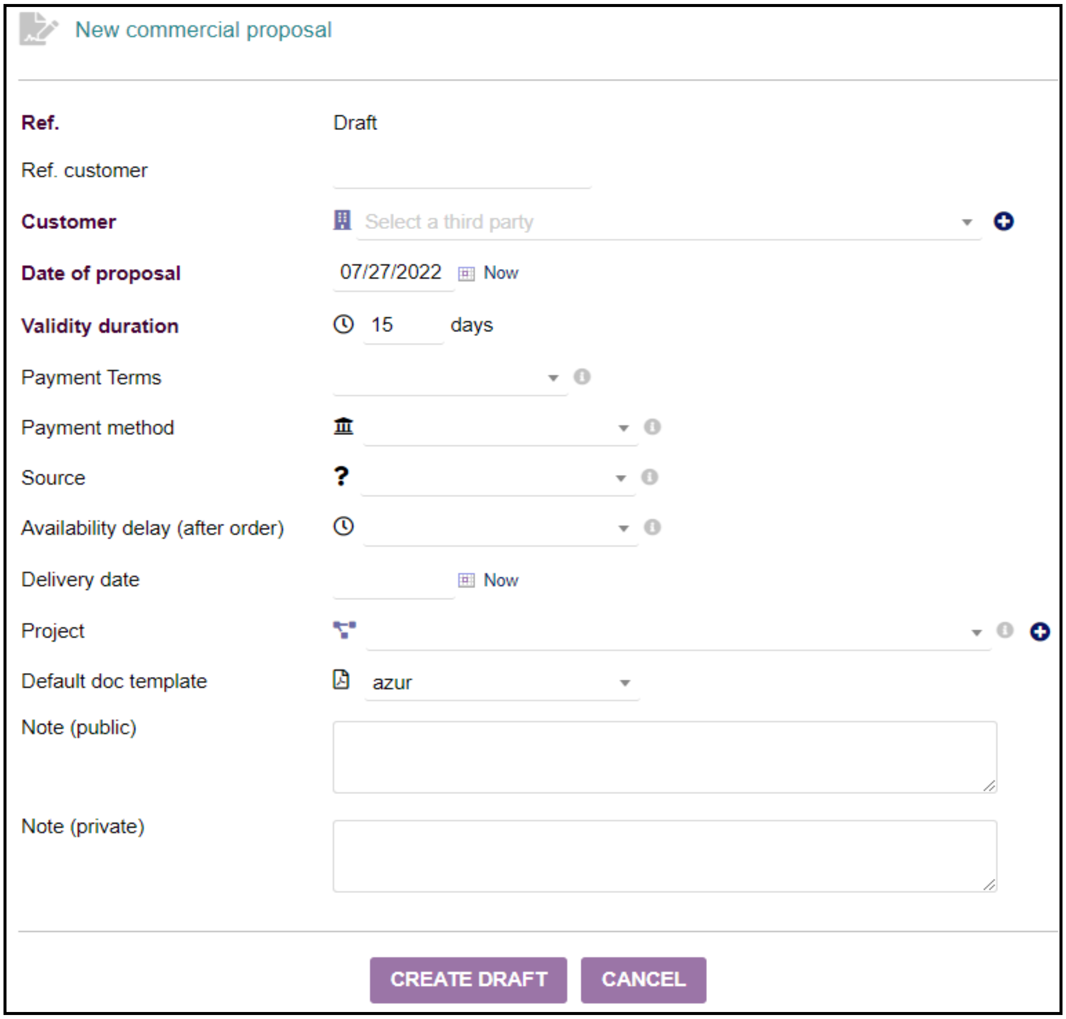

Figure 3.1: New commercial proposal form

3. Enter information into the form. See “ Required and optional fields in New Commercial Proposal” on page 12.

Fields in New Commercial Proposal	**Description**	**Required /Optional**
Ref. customer	Identify the customer.	Required
Customer	Select the Third-Party that the customer belongs to from a drop-down list.	Required

Table 3.1: Required and optional fields in New Commercial Proposal

Fields in New Commercial Proposal	Description	Required /Optional
Date of proposal	The date the proposal was created.	Optional
Validity duration	The number of days the proposal is valid.	Optional
Payment Terms	Choose the payment terms using the drop-down list with the following options: • Due Upon Receipt • 30 days • 30 days of month-end • 60 days • 60 days of month-end • Order • Delivery • 50-50 • 10 days • 10 days of month-end • 14 days • 14 days of month-end	Optional
Payment method	Choose the method of payment using the drop-down list with the following options: • Bank transfer • Cash • Check • Credit card • Debit payment order	Optional
Delivery date	Identify the date in which the Proposal goods or services will be delivered.	Optional

Table 3.1: (Continued)Required and optional fields in New Commercial Proposal

4. Click **CREATE DRAFT**.

   Proposal is drafted.

Viewing Proposals

You can view, and filter the Proposals associated with your organization.

List and filter Proposals

1. Click **Commerce**.

2. Click **List** from the Commercial proposals side menu.

   List drop-down menu is displayed.

3. Perform any of the following tasks:

   • Click **List** to view all proposals.

   • Click **Drafts** to view drafted proposals.

   • Click **Open** to only opened proposals.

   • Click **Signed (needs billing)** to view signed and not billed proposals.

   • Click **Not signed (closed)** to view not signed and closed proposals.

   • Click **Billed** to view billed proposals.

   Filtered list of Proposals is displayed.

Following up on Proposals

Newly created Proposals are in Draft mode. To modify, or update the Proposal, you must open/validate it.

Validating Proposals

To validate, or open a Proposal, you must add financial details to the case.

Add financial details to a Proposal

1. Click **Commerce**.

2. Click **List** from the Commercial proposals side menu.

   List drop-down menu is displayed.

3. Click **Drafts**.

   List of Drafted commercial proposals is displayed.

4. Click the **Ref.** you want to validate.

5. Enter information into the **Commercial proposal** input table. See "Commercial proposal input table" on page 15. See "Required and optional fields in Commercial proposal table" on page 15.

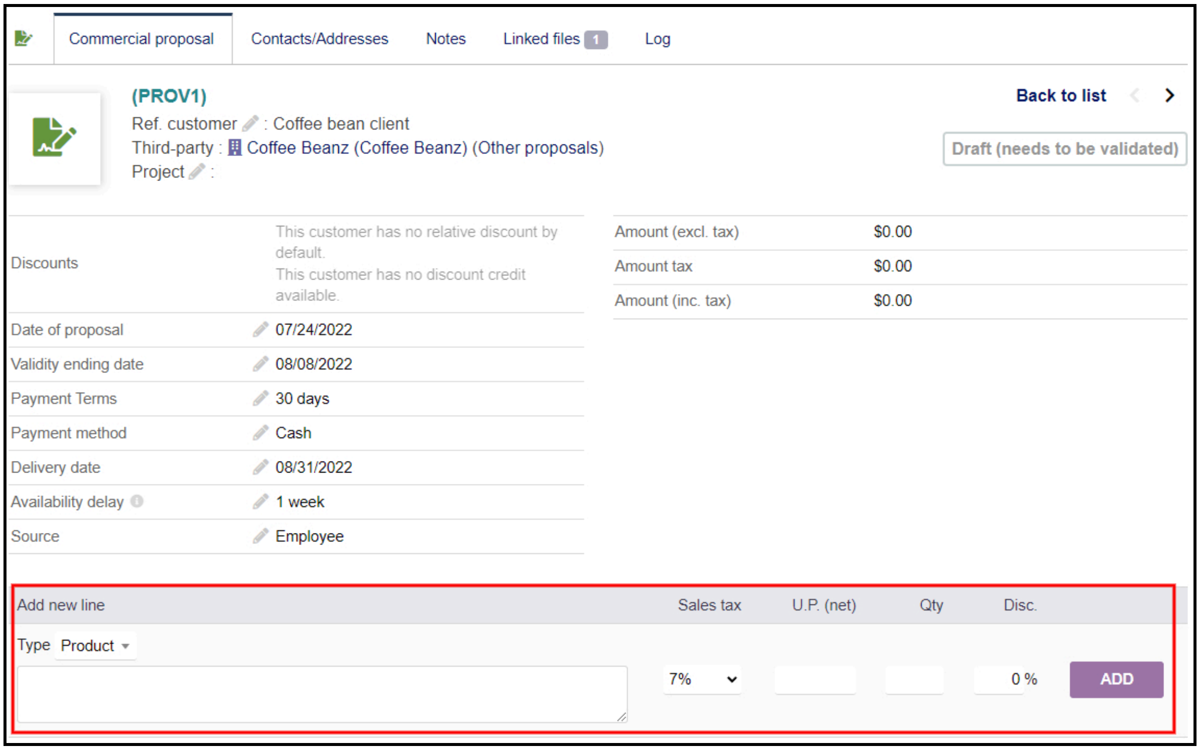

Figure 3.2: Commercial proposal input table

Fields in Commercial proposal table	**Description**	**Required /Optional**
Type	Choose whether the Proposal is a product, or a service using the drop-down list.	Required
Text box	Describe the product or service.	Required
Taxes	The tax percentage used in the product or service.	Optional
U.P. (net)	Net price per product or service.	Optional
Qty	The quantity of products exchanged.	Optional
Disc.	Discount rate in percent.	Optional

Table 3.3: Required and optional fields in Commercial proposal table

6. Click **ADD.**

7. Click **VALIDATE**.

   A dialogue box prompting you to confirm the validation is displayed.

8. Click **Yes**.

   Financial details are added to the Proposal.

Updating Validated Proposals

You can update whether your Third-party has signed the Proposal.

Update signed or unsigned Proposals

1. Click **Commerce**.

2. Click **List** from the Commercial proposals side menu.

   Commercial proposals List drop-down menu is displayed.

3. Click **Open**.

4. Click the **Ref.** you want to update.

5. Commercial proposal information is displayed.

6. Click **SET ACCEPTED/REFUSED**. See "SET ACCEPT/RUFUSED button location" on page 16.

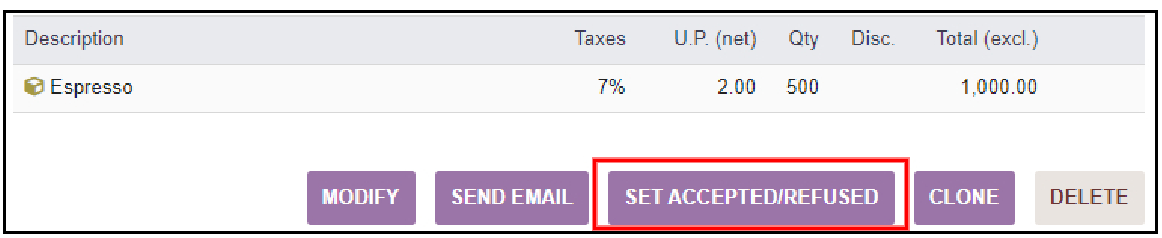

Figure 3.4: SET ACCEPT/RUFUSED button location

   Accepted/refused dialogue box is displayed.

7. Perform one of the following tasks using the **Set status to** drop-down list. See "Drop-down status list in Set accepted/refused dialogue box" on page 17.

- Click **Signed** if the Proposal was signed.
- Click **Not Signed** if the Proposal was not signed.

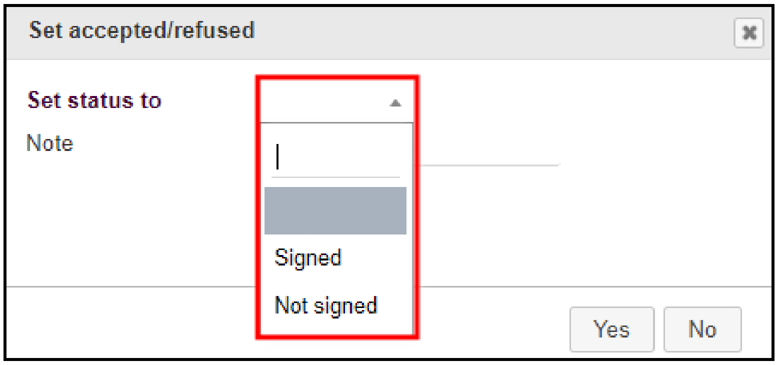

Figure 3.5: Drop-down status list in Set accepted/refused dialogue box

8. Click **Yes.**

   Status is updated.

Updating Signed Proposals

Once your Third-party has signed and been billed the amount listed in the Proposal, you can update the Third-Party's billing status.

Classify billed Proposals

1. Click **Commerce**.

2. Click **List** from the Commercial proposals side menu.

   List drop-down menu is displayed.

3. Click **Signed (needs billing)**.

4. Click the **Ref.** you want to update.

   Commercial proposal information is displayed.

5. Click **CLASSIFY BILLED**. See "CLASSIFY BILLED button location" on page 18.

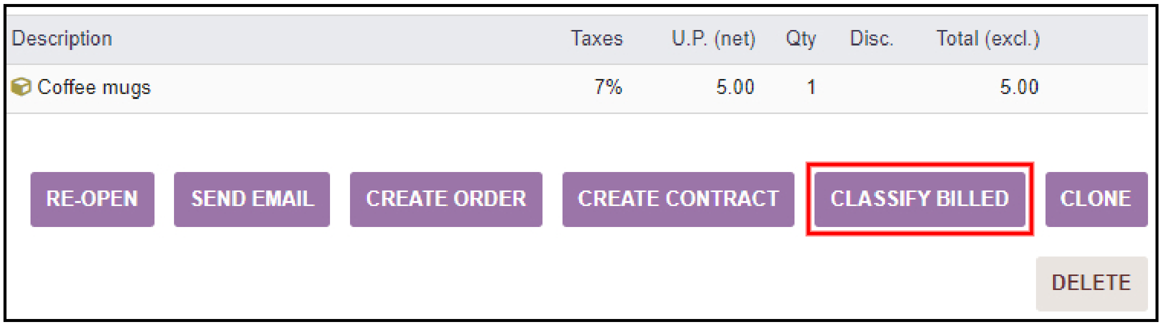

Figure 3.6: CLASSIFY BILLED button location

Proposal is classified as Billed.

Re-opening Unsigned Proposals

Unsigned Proposals are closed by default, and can be re-opened.

Re-open unsigned Proposals

1. Click **Commerce**.

2. Click **List** from the Commercial proposals side menu.

   List drop-down menu is displayed.

3. Click **Not signed (closed)**.

4. Click the **Ref.** you want to update.

   Commercial proposal information is displayed.

5. Click **RE-OPEN**. See "RE-OPEN button location" on page 18.

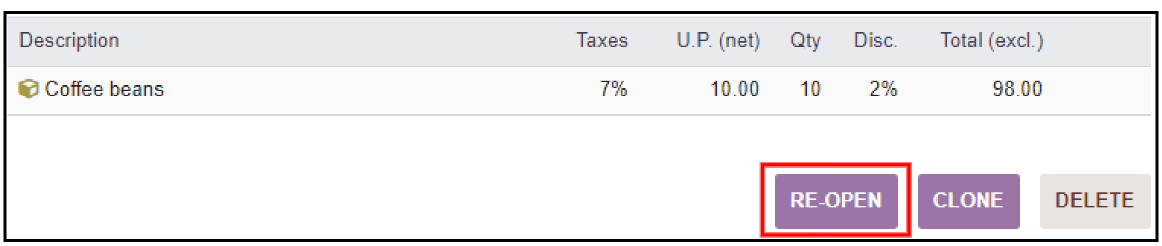

Figure 3.7: RE-OPEN button location

Unsigned Proposal is re-opened.

Modifying, Cloning, and Deleting Proposals

You can modify, clone, or delete opened Proposals to reflect its current status within your organization.

Modify, clone, or delete Proposals

1. Click **Commerce**.

2. Click **List** from the Commercial proposals side menu.

   List drop-down menu is displayed.

3. Click **Open**.

4. Click the **Ref.** you want to modify, clone, or delete.

   Commercial proposal information is displayed.

5. Click **MODIFY, CLONE,** or **DELETE**. See "Function and outcome of MODIFY, CLONE, and DELETE buttons in Commercial proposal" on page 19.

> **Warning:** Deleted items cannot be recovered.

Button Name	Function	Outcome
MODIFY	Edit the Proposal.	An editable version of the form is displayed.
CLONE	Clone the existing Proposal	A dialogue box prompting you to confirm is displayed. Click **Yes** to confirm.
DELETE	Permanently delete the Proposal.	A dialogue box prompting you to confirm is displayed. Click **Yes** to confirm.

Table 3.8: Function and outcome of MODIFY, CLONE, and DELETE buttons in Commercial proposal

Visualizing Proposal Statistics

Collect the data, analyze, and effectively present the results of your Proposals.

View Proposal statistics

1. Click **Commerce**.

2. Click **Statistics** from the Commercial proposals side menu.

   Commercial proposal's statistics are displayed.