Edit Proposal

OVERVIEW

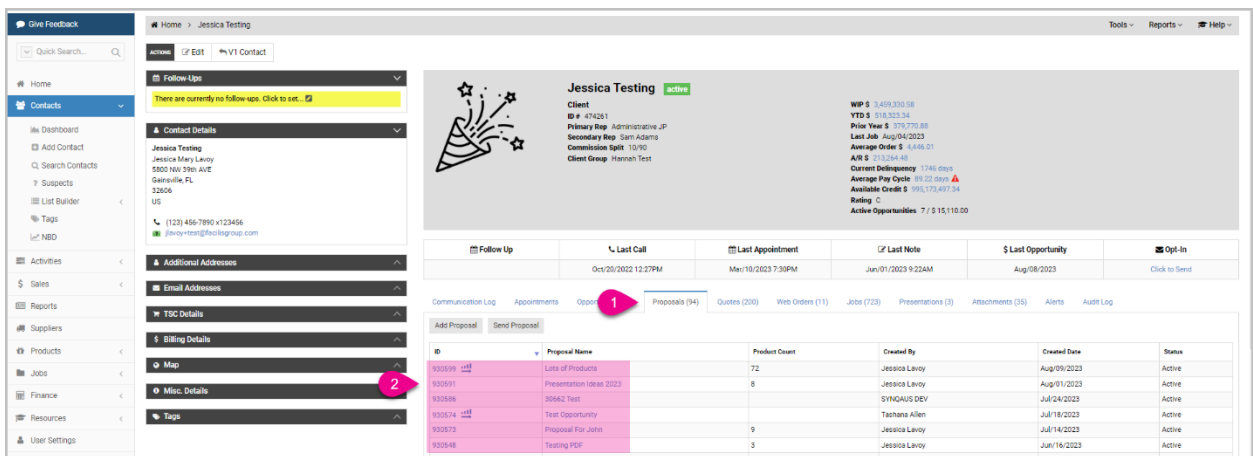On the Proposal page, you can edit Proposal details, products, and branding.

Users
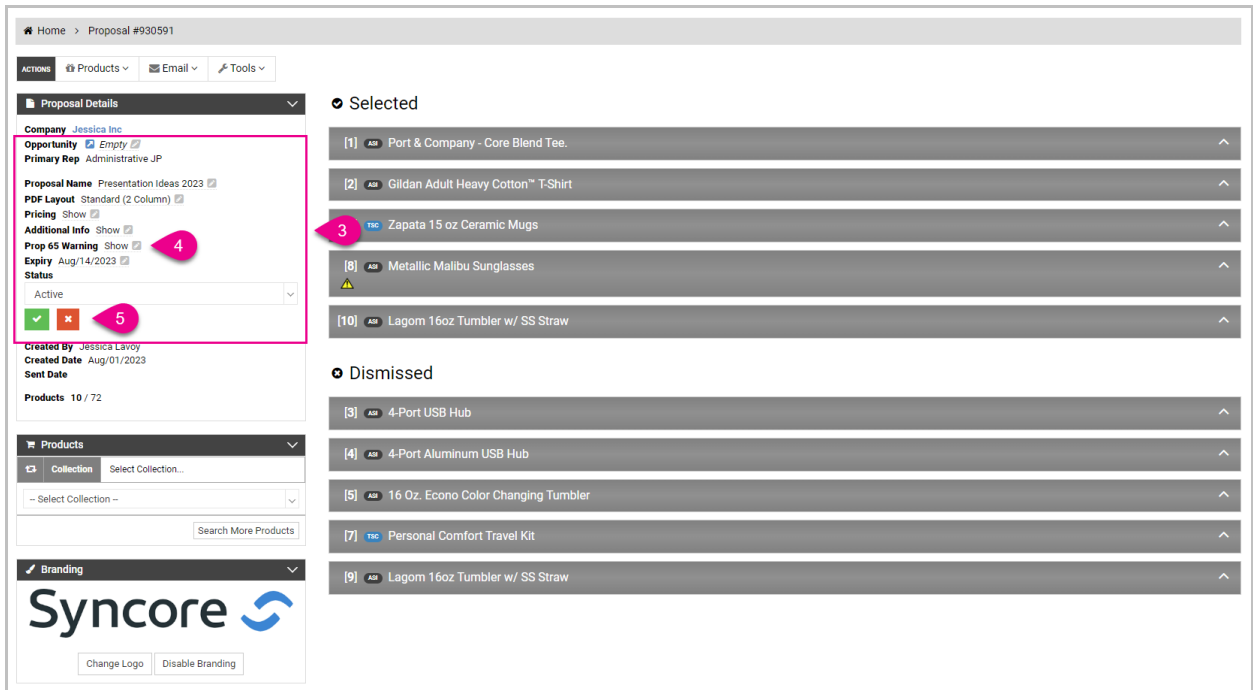
Sales Rep, CSR, Management, Finance and Admin Users.

To edit Proposal details:

1. On the Contact page, select the **Proposals** tab from the row of tabs.

2. Select the Proposal from the list to edit.

    The Proposal page opens.

3. Under **Product Details**, you can edit the following fields:

- **Opportunity**: choose the opportunity
- **Proposal Name**: edit the name
- **PDF Layout**: 2 or 3 columns
- **Pricing**: show or hide
- **Additional Info**: show or hide
- **Prop 65 Warning**: show or hide
- **Expiry**: edit date
- **Status**: active or inactive.

4. For each field, select the (pencil icon) to choose from the dropdown menu or calendar, or to edit the text.

5. Select:
- (red x) to close without saving.
- (green checkmark) to save edits.

Messaging

Sales Reps can also leave a comment in a Proposal to show to a Customer, and then another comment after the Customer submits the order to provide additional information if needed.
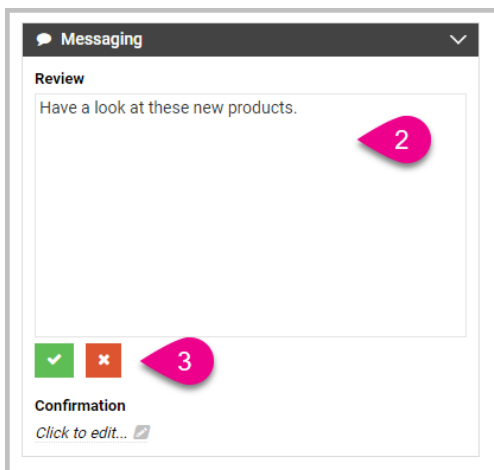
The "Messaging" section is under the "Branding" section on the Proposal page. Under Messaging, the Sales Rep can leave comments under **Review** and **Confirmation**.

To edit a Review message on a Proposal:

1. In the Messaging section under **Review**, select *click to edit*.
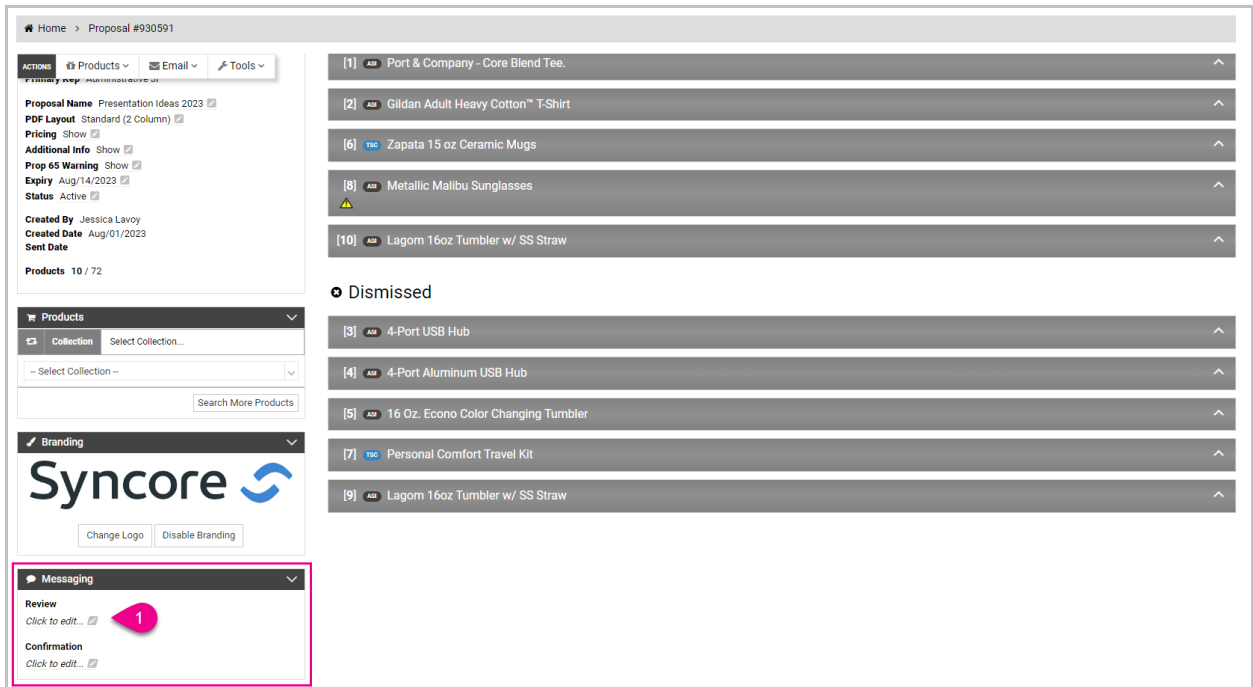
The text box opens.

2. Enter/edit your message.

3. Select:

    - (red x) to close without saving.
    - (green checkmark) to save edits.

    The Review message appears at the top of the Proposal presentation next to a headshot photo of the Primary Rep.

Hi Taylor, here's a list of products I put together for your event. Please select the ones you like and let me know if you have any questions. Cheers!

Proposal #1957597

DISTINCTIVE DRINKWARE

Created on December 07, 2023 • Expires on September 11, 2023

From
Admin JP
LogoMedia
909 North 20th Street
St. Louis, MO 63106

To
Taylor Smith
Syncore Inc
1600 S. Brentwood Blvd
Suite 800
St. Louis, MO 63144

1	**2**	**3**	**4**
$6.99 — $8.67	$27.99	$37.98 — $57.16	$16.99 — $18.99
Lagom 16oz Tumbler w/ SS Straw	Aviana Pinnacle Double Wall Stainless Bottle - 34 Oz.	MiiR® Vacuum Insulated Wide Mouth Bottle - 20 Oz.	20.9 oz. H2go Wave
Select	Select	Select	Select
5	**6**	**7**	**8**
$16.99 — $19.49	$4.99 — $7.59	$15.99 — $18.29	$36.29 — $39.59
12 oz Urban Peak® 2-in-1 Slim Vacuum Can Tumbler	16 OZ. NEWPORT WHEAT TRAVEL TUMBLER	12 oz Urban Peak® 3-in-1 Trail Insulator	Columbia® 21 fl. oz. Double-Wall Vacuum Bottl...
Select	Select	Select	Select

When you've selected the products you like, hit the "Send to rep" button and I will review and reach out to you with the next steps! If there's nothing that catches your eye, hit the "Dismiss all products" button and I'll try again.

Dismiss all products   Send to rep

NOTES:

i. The Review message only appears if the Proposal has **not** been submitted.

ii. The instructional message below the products is not editable.

To edit a Confirmation message on a Submitted Proposal:

1. In the Messaging section under **Confirmation**, select *click to edit*.

    The text box opens.

2. Enter/edit your message.

3. Select:

    *   ❌ (red x) to close without saving.

    *   ✅ (green checkmark) to save edits.

    The Confirmation message appears at the top of the Proposal presentation next to a headshot photo of the Primary Rep.

NOTE: When all products in the Proposal have been dismissed, the page will refresh with a message at the top. This message is **not** editable in Syncore.

Sorry the products are not meeting your needs. I'll be in touch to work on a solution together.

Proposal #1958534

DISTINCTIVE DRINKWARE

Created on December 11, 2023 · Expires on September 11, 2023

From
Admin JP
LogoMedia
909 North 20th Street
St. Louis, MO 63106

To
Taylor Smith
Syncore Inc
1600 S. Brentwood Blvd
Suite 800
St. Louis, MO 63144

1	2	3	4
$6.99 – $8.67	$27.99	$37.98 – $57.16	$16.99 – $18.99
Lagom 16oz Tumbler w/ SS Straw	Aviana Pinnacle Double Wall Stainless Bottle - 34 Oz.	MiiR® Vacuum Insulated Wide Mouth Bottle - 20 Oz.	20.9 oz. H2go Wave