



Proposals: Presentation

OVERVIEW

Sales Reps can share a Proposal of products displaying suggested options and product details with their Contacts. Customers can choose the products they like to submit back to the Sales Rep without having to email or call the Rep.

Users

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

To go to the Proposal:

1. Copy the URL from the Proposal page and paste it in a new tab.
The Proposal. opens.

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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 #1957587

DISTINCTIVE DRINKWARE

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

<p>From</p> <p style="font-size: 0.8em;">Admin JP LogoMedia 909 North 20th Street St. Louis, MO 63106</p>	<p>To</p> <p style="font-size: 0.8em;">Taylor Smith Syncore Inc 1600 S. Brentwood Blvd Suite 800 St. Louis, MO 63144</p>
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1

\$6.99 – \$8.67

Lagom 16oz Tumbler w/ SS Straw

Select

2

\$27.99

Aviana Pinnacle Double Wall Stainless Bottle - 34 Oz.

Select

3

\$37.99 – \$57.16

Miir® Vacuum Insulated Wide Mouth Bottle - 20 Oz.

Select

4

\$16.99 – \$18.99

20.9 oz. H2go Wave

Select

5

\$16.99 – \$19.49

12 oz Urban Peak® 2-in-1 Slim Vacuum Can Tumbler

Select

6

\$4.99 – \$7.59

16 OZ. NEWPORT WHEAT TRAVEL TUMBLER

Select

7

\$15.99 – \$18.29

12 oz Urban Peak® 3-in-1 Trail Insulator

Select

8

\$36.29 – \$39.59

Columbia® 21 fl. oz. Double-Wall Vacuum Bottl...

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

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Proposal:

Header: Partner's colour in the top bar/banner and the Proposal number.

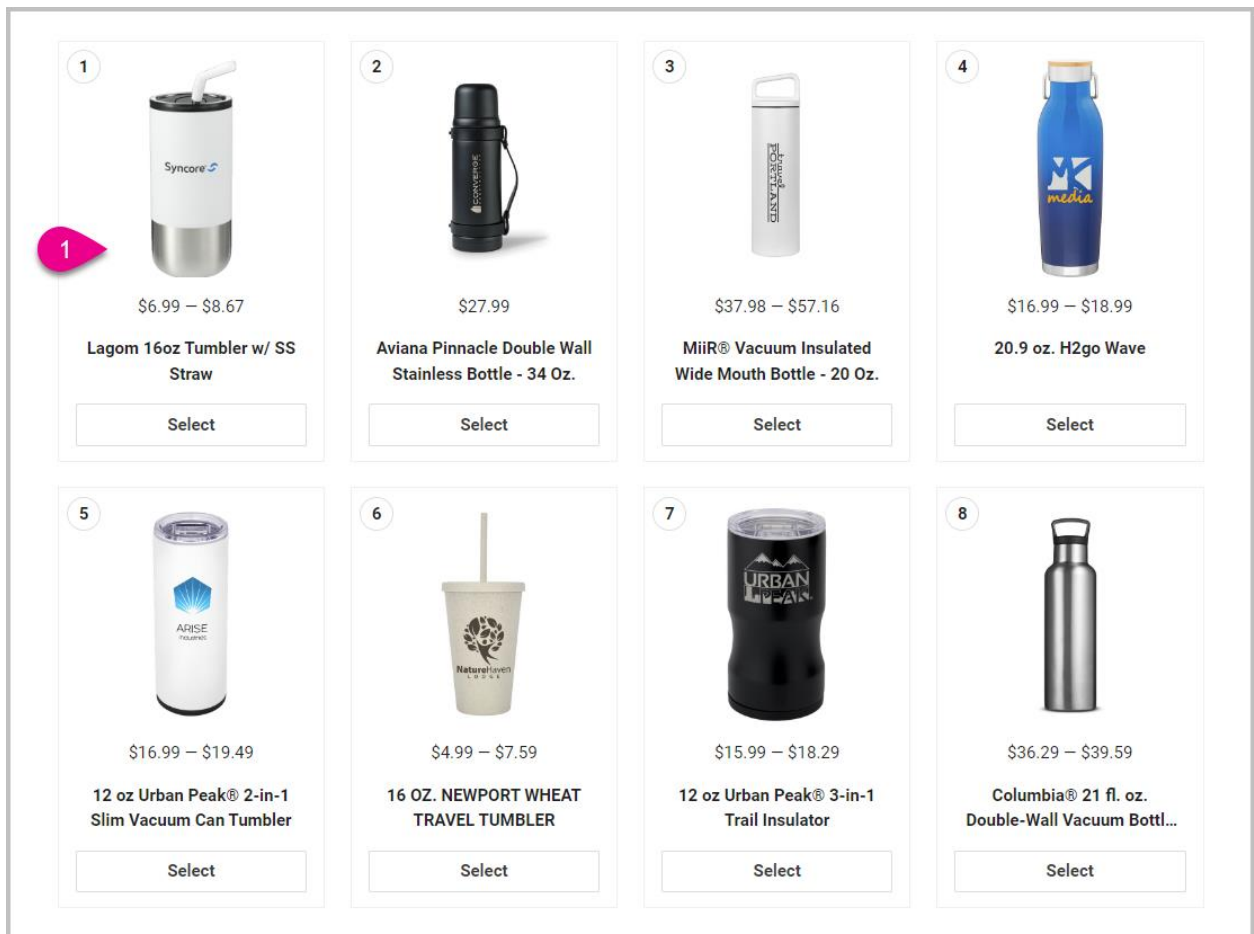
Footer: Partner logo above the copyright with the Partner name and current year.

The following information is displayed on the page:

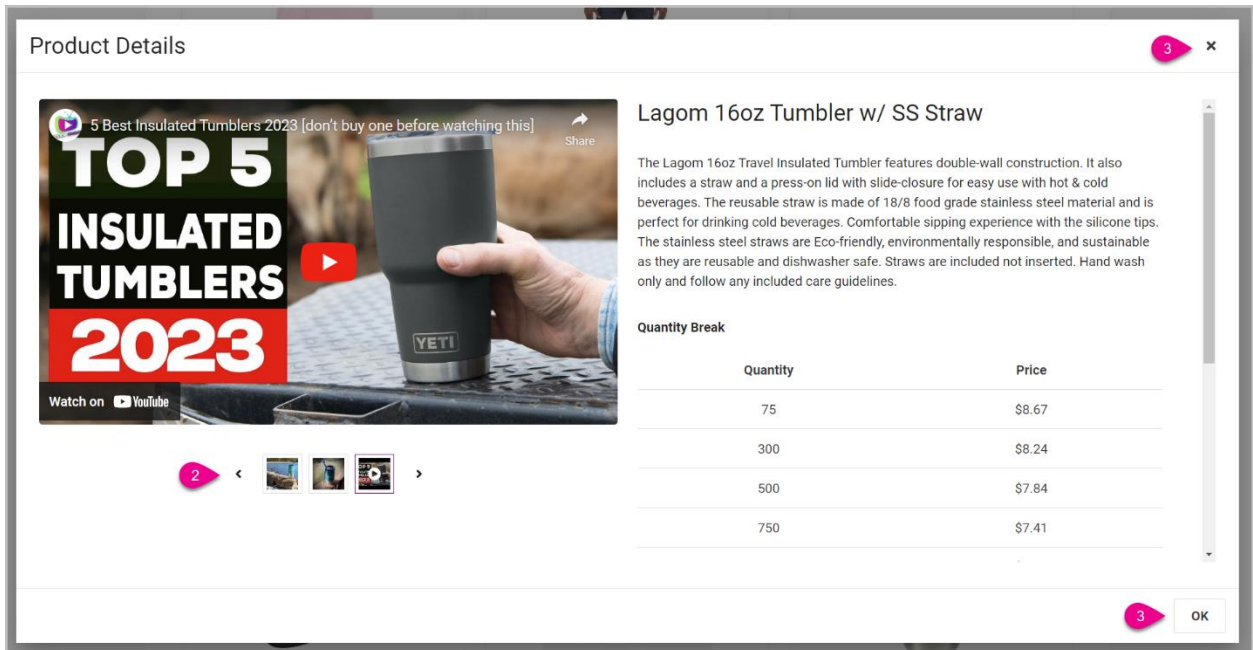
- Proposal name
- Created on and expiring on dates
- From Address: from Partner profile address
- To Address: from Contact's main name and sold to address.

To view the product details:

1. Select the product image or name.



The product details window opens.



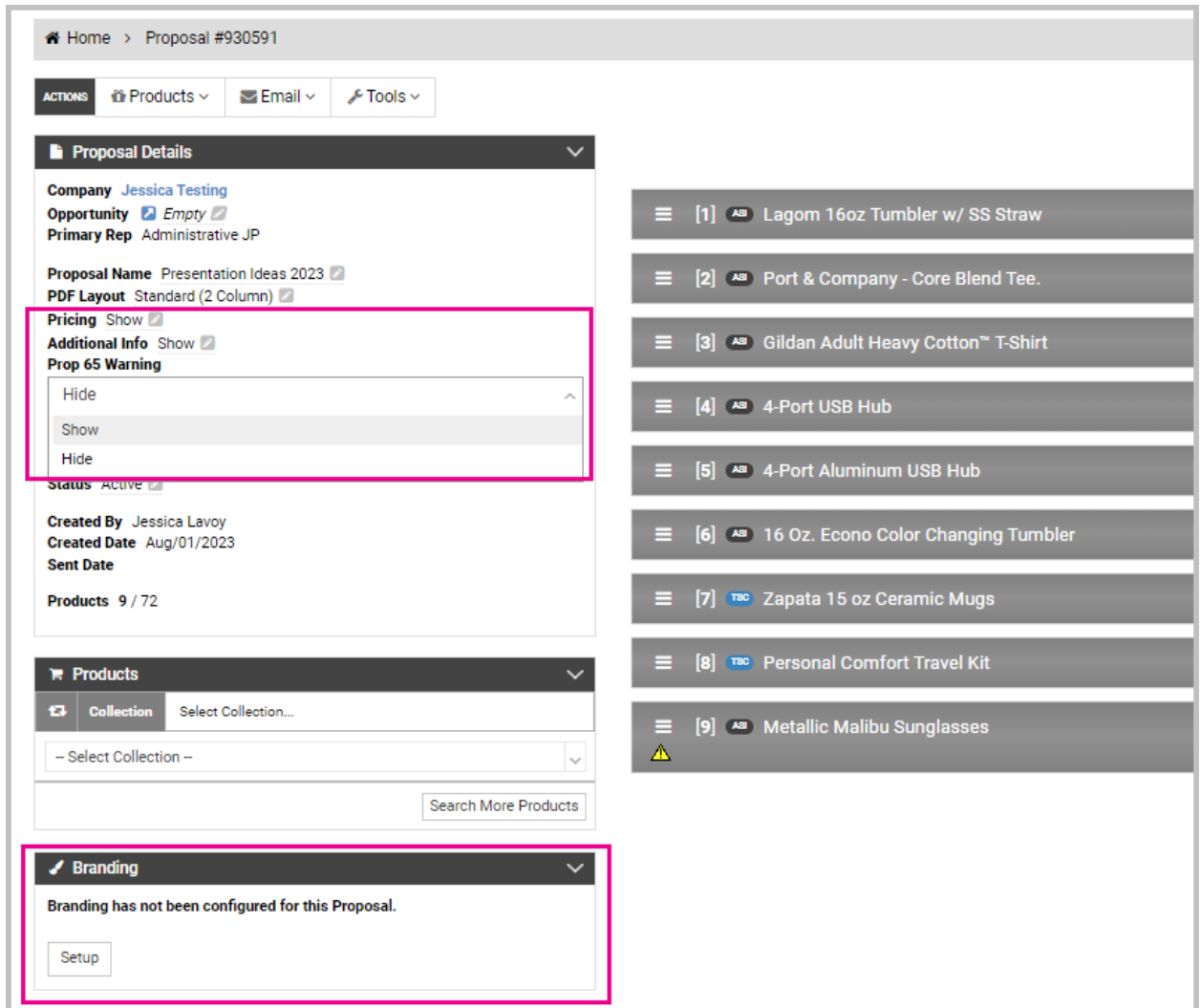
The following product information is displayed:

- Product name
 - Product description
 - Pricing grid (of the enabled columns)
 - List of sizes
 - List of colours
 - List of decoration methods
 - Production time
 - Packaging
 - Special pricing
 - The Prop 65 warning, if applicable
 - Setup Charge.
2. Scroll through media to view a specific image or video.
 3. Select **OK** or the **x** at the top to close.

NOTES:

- i. When branding has been configured, the product image (when selected) will display the product image with the logo.

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- ii. When "hide" is selected for "Pricing", the pricing grid does not show for any product.
- iii. When "hide" is selected for " additional Info ", the following information is not displayed:
 - Sizes
 - Colours
 - Decoration methods
 - Production time
 - Packaging
 - Special Comments
 - Setup Charge.

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- iv. When "hide" is selected for "Prop 65 Warning", the warning is not displayed for any product in the Proposal.

To choose product(s) to send to the Sales Rep:

1. Select **Select** under the product(s).
Select again to de-select a product.
2. Select **Send to rep** to choose product(s).

One or more products must be selected to send selection back to your Sales Rep.

WARNING: This action cannot be undone.

The screenshot displays a grid of eight product cards, each with a numbered circle in the top left corner. Each card contains an image of the product, its name, price range, and a 'Select' button. Item 1, a 'Lagom 16oz Tumbler w/ SS Straw', has a blue 'Selected' button with a checkmark. Item 6, a '16 OZ. NEWPORT WHEAT TRAVEL TUMBLER', also has a blue 'Selected' button. At the bottom right, a 'Send to rep' button is highlighted with a pink callout bubble containing the number '2'. A 'Dismiss' button is partially visible to its left. A light blue banner at the bottom of the grid contains a user icon and the text: '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.'

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

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To dismiss all product(s) to send to the Sales Rep:

1. Select **Dismiss all products** at the bottom of the page.
Individual products cannot be selected to dismiss all products.
The “Dismiss proposal?” window opens.
2. Select:
 - **Cancel** to stay on the page
 - **Dismiss** to continue.

WARNING: This action (Dismiss) cannot be undone.

