

Create Multiple Proposals for Same Customer

On the proposal screen there is a copy button, select the copy button and it will create another option

Create Client Proposal [Option 2 of 2]

Job Location: 5 Kotzikas Pl, Wigram, Christchurch 8042, New Zealand
Contact Person: Miss test test
Supplier: N/A
Customer Reference: Miss test test - version 2
Options: Miss test test - version 2 #2 (selected), Miss test test - version 2 #1: \$2,000.00, Miss test test - version 2 #2

Inc.	Room	Qty	Retail (inc GST)	Discount	Total Retail (inc GST)
master	a - Curtain and Track	1.00	\$1,177.34	\$9.63	\$1,167.71
master	a - Curtain and Track	1.00	\$1,106.50	\$0.00	\$1,106.50
			\$2,283.84	\$9.63	\$2,274.21

Summary: Gross Retail \$ 2,274.21, Discount \$ -274.21, Total Retail \$ 2,000.00

Buttons: Save, Create Order

Select the second option and build a second proposal for the customer by changing relevant information. This means you can print off as many copies as you need for the customer

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Options: Miss test test - version 2 #2

Inc.	Room	Qty	Retail (inc GST)	Discount	Total Retail (inc GST)
master	a - Curtain and Track	1.00	\$1,177.34	\$9.63	\$1,167.71
master	a - Curtain and Track	1.00	\$1,106.50	\$0.00	\$1,106.50
			\$2,283.84	\$9.63	\$2,274.21

Summary: Gross Retail \$ 2,274.21, Discount \$ -274.21, Total Retail \$ 2,000.00

Buttons: Save, Create Order

Once the customer has accepted the correct option, once you open the proposal, you can delete the options no longer needed

Select **'Create Order'** of the one you want to send

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Supplier: N/A
Customer Reference: Miss test test - version 2
Options: Miss test test - version 2 #2

Inc.	Room	Qty	Retail (inc GST)	Discount	Total Retail (inc GST)
<input checked="" type="checkbox"/>	master				
<input checked="" type="checkbox"/>	a - Curtain and Track	1.00	\$1,177.34	\$9.63	\$1,167.71
<input checked="" type="checkbox"/>	a - Curtain and Track	1.00	\$1,106.50	\$0.00	\$1,106.50
			\$2,283.84	\$9.63	\$2,274.21

Proposal Tools: Installation, What if..., Re-Cost, View Margin Report, View Client Proposal

Gross Retail \$ 2,274.21
Discount \$ -274.21
Total Retail \$ 2,000.00

Save Create Order ←

If you don't cancel the options you don't need, they will stay as a saved proposal until you have either ordered them off or cancelled them