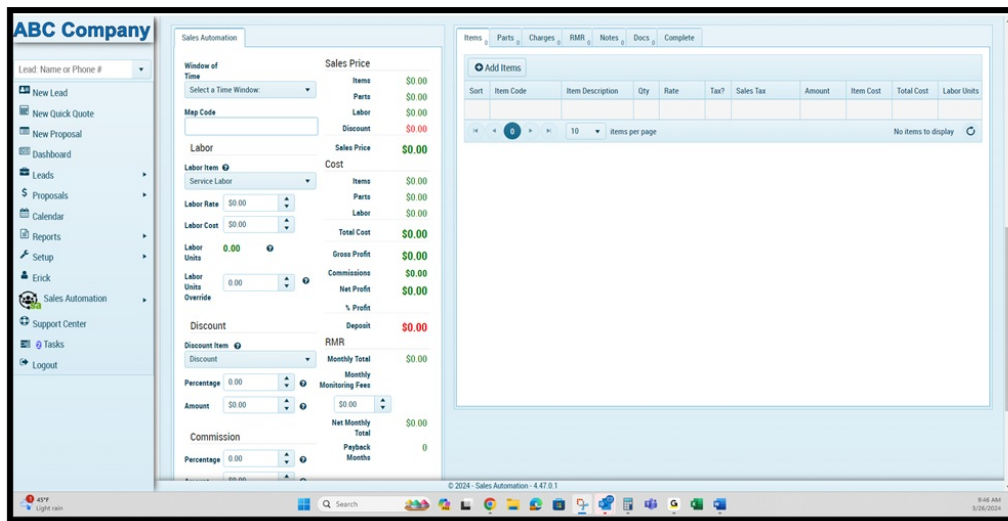


Adding items to the Overview will add line items to the proposal (AlarmBiller)

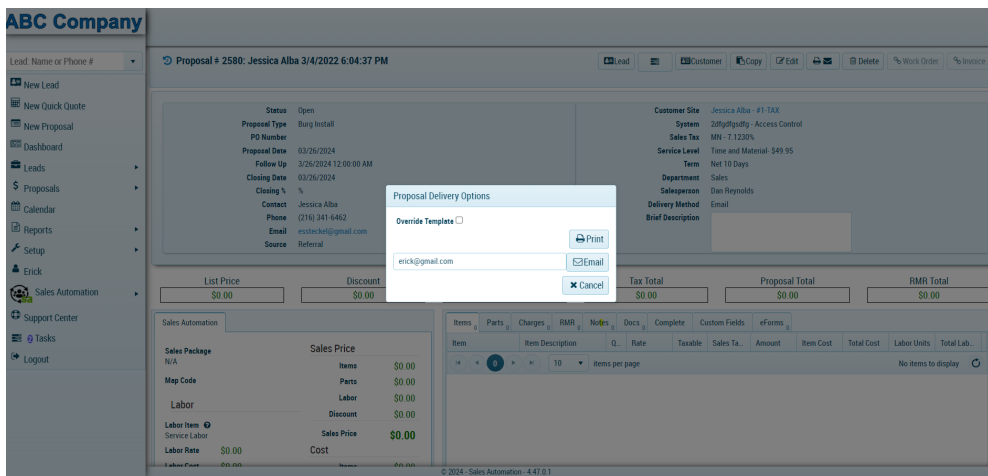
06/04/2024 10:03 am EDT

In case 105387 the Dealer was adding a service level labor item to the Overview of the proposal as well as adding a line item to the proposal and this caused the item to appear twice on the proposal itself. This also happens if you add a discount item.

1) Log into a proposal, add a Labor Item and a Discount item to the overview and then save



2) Push the Print/Envelope icon in the upper right corner and then elect to print



3) This will pull up a PDF of the proposal. Now, we didn't add any items to the proposal, but we did add a labor item and

discount item to the overview of the proposal and this will cause those items to appear.



Proposal

Proposal # 2580	Customer # 1361	System Type Access Control	PO Number	Term Net 10 Days	Proposal Date March 26, 2024
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Customer:
Jessica Alba
123 youwish Dr.
Cleveland, OH 44105

Site Location:
Jessica Alba
123 youwish Dr.
Cleveland, OH 44105

Contact Information:	Brief Description:
Customer Contact Jessica Alba Phone: (216) 341-6462 Email: essteckel@gmail.com Salesperson Name: Dan Reynolds Phone: Email: Dan.Reynolds@boldgroup.com	

Charges

Description	QTY	Rate	Amount
Service Labor	1.00	0.00	0.00
Discount	1.00	0.00	0.00
Total Charges:			0.00
Sales Tax:			0.00
Amount: 0			Grand Total: \$0.00

Notes

Note	Modified Date	User
------	---------------	------

X _____
Agreed To By

Name

Date

CONTACT US

Billing Questions (440) 247-5602 x205	Sales (440) 555-1213	Central Station (440) 487-2358	Service (440) 555-1212	Email just_an_email@my_company.com
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To view this proposal online, please visit: <https://bradssecurity.alarmbiller.com> | Registration Key: C52F1B

4) If we go back to our proposal, we can also add the labor item and discount item by going into edit mode and adding them under the items tab

ABC Company
Lead: Name or Phone #
New Lead
New Quick Quote
New Proposal
Dashboard
Leads
Proposals
Calendar
Reports
Setup
Link
Sales Automation
Support Center
Tasks
Logout

Duration (minutes): 60.00
Est Closing: 3/26/2024
Est Closing %: 0 %
Source: Referral
Department: Sales
Salesperson: Dan Reynolds
Delivery Method: Email
Brief Description:
200 characters remaining

List Price: \$0.00
Discount: \$0.00
Sales Price: \$0.00
Est Tax: \$0.00
Proposal Total: \$0.00
RMR Total: \$0.00

Hide SA Summary
Sales Automation
Window of Time: Select a Time Window
Map Code
Labor
Labor Item: Service Labor
Labor Rate: \$0.00
Labor Cost: \$0.00
Labor Units: 0.00
Sales Price: \$0.00
Cost: \$0.00
Total Cost: \$0.00
Gross Profit: \$0.00

Items
Parts
Charges
RMR
Notes
Docs
Complete
Add Items
Sort
Item Code
Item Description
Qty
Rate
Tax?
Sales Tax
Amount
Item Cost
Total Cost
Labor Units
1 Service Labor Service Labor 1 \$0.00 Y MN \$0.00 \$0.00 \$0.00 0.00
1 Discount Discount 1 \$0.00 N MN \$0.00 \$0.00 \$0.00 0.00
10 items per page 1 - 2 of 2 items

5) Printing the PDF of the proposal we now see each item twice



Proposal

Proposal # 2580	Customer # 1361	System Type Access Control	PO Number	Term Net 10 Days	Proposal Date March 26, 2024
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Customer:
Jessica Alba
123 youwish Dr.
Cleveland, OH 44105

Site Location:
Jessica Alba
123 youwish Dr.
Cleveland, OH 44105

Contact Information: Customer Contact: Jessica Alba Phone: (216) 341-6462 Email: essteckel@gmail.com Salesperson Name: Dan Reynolds Phone: Email: Dan.Reynolds@boldgroup.com	Brief Description:
---	---------------------------

Charges

Description	QTY	Rate	Amount
Service Labor	1.00	0.00	0.00
Discount	1.00	0.00	0.00
Service Labor	1.00	0.00	0.00
Discount	1.00	0.00	0.00
Total Charges:			0.00
Sales Tax:			0.00
Grand Total:			\$0.00

Amount: 0

Notes

Note	Modified Date	User
------	---------------	------

X _____
Agreed To By Name Date

CONTACT US

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