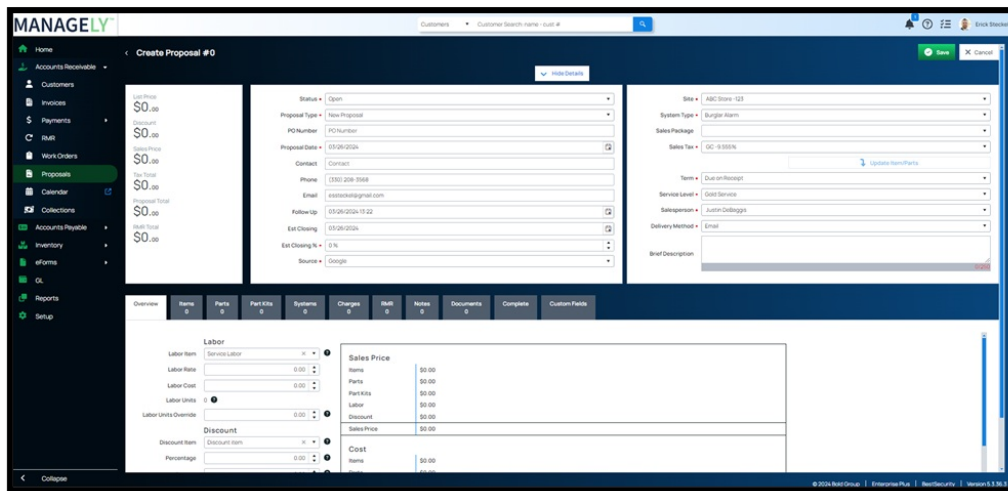


Adding items to the Overview will add line items to the proposal (Managely)

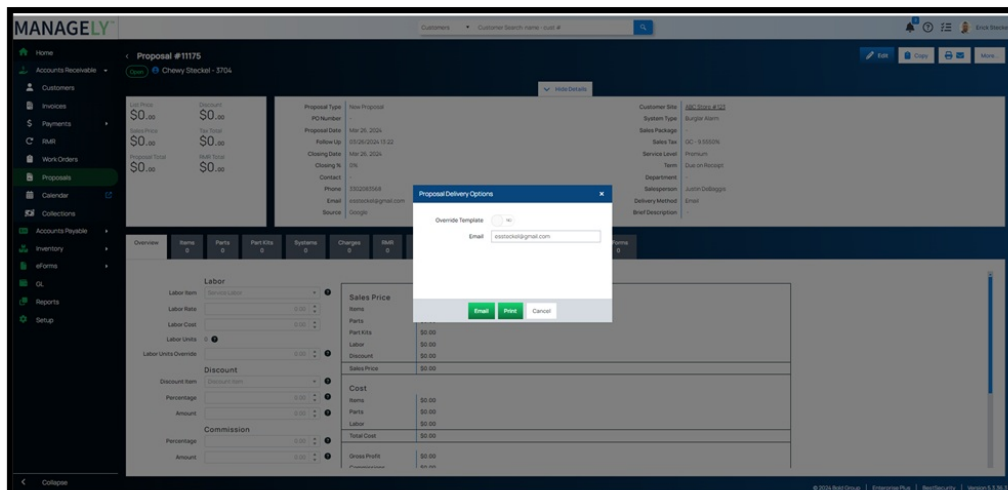
06/04/2024 10:06 am EDT

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 cause the item to appear twice on the proposal itself. This also happens if you add a discount item.

1) Log into a proposal and add a Labor Item and a Discount item to a proposal 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 service level

MANAGELY™

Proposal

547 E. Washington Street
Apt. 2111
Chagrin Falls, OH 44023
(440) 551-4464 x123

Proposal #	Customer #	System Type	PO Number	Term	Proposal Date
11175	3704	Burglar Alarm		Due on Receipt	March 26, 2024

Customer:
Chewy Steckel
1940 Vancouver St.
Cuyahoga Falls, OH 44221 -

Site Location:
ABC Store
2121 West Spring Pkwy
Allen, TX 75024 -

Contact Information:	Brief Description:
Customer Contact Chewy Steckel Phone: (330) 208-3568 Email: essteckel@gmail.com Salesperson Name: Justin DeBaggis Phone: Email: justin.debaggis@boldgroup.com	

Charges

Description	QTY	Rate	Amount
Ungrouped			
Service Labor	1.00	50.00	50.00
Discount item	1.00	0.00	0.00
Service Labor	1.00	0.00	0.00
Discount item	1.00	0.00	0.00
Total Charges:			50.00
Sales Tax:			4.78
Grand Total:			\$54.78

Notes

Note	Modified Date	User
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x _____
Agreed To By Name Date