

Multiple ways of looking up a proposal (AlarmBiller)

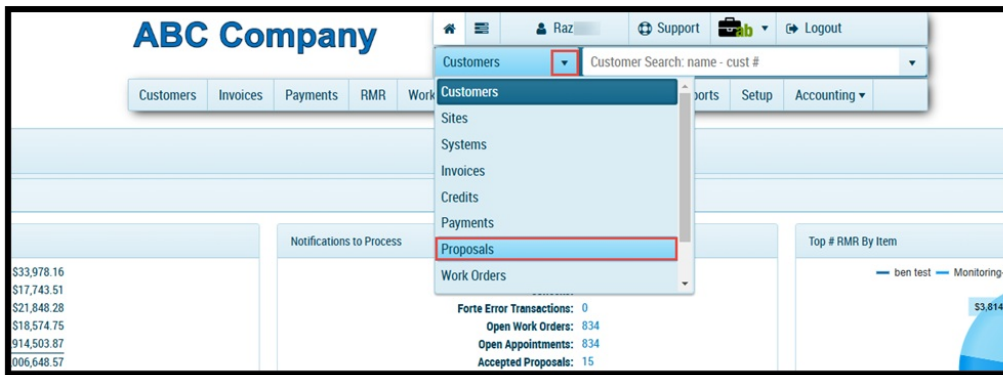
11/18/2024 8:46 am EST

*(instructions without using Sales Automation)

In AlarmBiller proposals can be looked up in multiple ways.

There are multiple ways of looking up a proposal.

1. Switch the search criteria from the top drop-down from Customers to Proposals (then type the proposal number in the search area and push the Enter key):



2. From the main menu, clicking on the Proposals tab.

Proposals

[New Proposal](#)

Open / Closed Proposals									
Accepted Proposals									
Rejected Proposals									
☐ Available Columns ☒ Export to Excel ☐ Show Custom Fields   Custom Grid Layouts									
☐ Show Closed Proposals									
#	Site	System Type	Salesperson	Created By	Status	Follow Up	Modified		
2145	Ross Jackson 55 Cedar Roa...	Burglar Alarm	To	Br	Open	03/25/2015	11/06/2024		
2586	Ross Jackson 55 Cedar Roa...	Burglar Alarm	To	Er	Open	03/25/2015	06/25/2024		
1006	Brett Frank 25 Richmond Ro...	Burglar Alarm	Br	Br	Open	03/03/2014	03/05/2014		
21	Brett Frank 25 Richmond Road, Beachwood	Ar Alarm	Br	Br	Open	04/27/2016	09/10/2018		
1011	Brett Frank 25 Richmond Ro...	Burglar Alarm	Br	Rc	Open	03/05/2014	03/05/2014		