Proposal Options

08/15/2025 1:15 pm CDT

Overview

Proposal Options gives you the ability to group detail lines together to give the contact options they can select. Detail Lines are grouped together with the same Option Name. As you add additional lines, you can start typing an option name and matching existing Open Names on the same proposal will be shown to pick.

Here is an image of how a Service Option on a Proposal appears to the customer.

If they select the checkbox, the Service will no longer be grey-out and the amount will appear in the total. On the User side, the option will no longer have a line through it. Telling you that the customer accepted that option.

> ℹ️ Whatever options are not chosen, they will appear as crossed out items on the proposal. This is intended behavior, so it is not an indication that something is wrong with the proposal.

Video Tutorial

Click here for a brief training video on Options

Settings and Navigation

You will need to **Edit** or create a new **Proposal** to create **Options**.

Creating Options

The first line on a Proposal is your main Service. If you add additional lines after that, you can categorize them. This makes them **Optional** choices for a customer to accept.

Option	Item	Description	Quantity	Rate
Select a template... ▼	Decomposition/Undiscovered Death ▼	Pricing Includes: Technician Hours, PPE, □ Taxable ✎	1	0
Labor	Lead Technician	Certified Lead Technician – Site Inspection & Management: X Hours ✎	3.5	275
Labor	First Additional Technician	Additional Technician: X Hours ✎	3.5	175
Labor	Second Additional Technician	Additional Technician: X Hours ✎	3.5	100

This is what it looks like on the proposal. You'll see the check box next to the term Labor (which was the term typed into the Options column).

The Items that have Labor typed next to them when building the proposal all get clustered under that option. If the customer were to click that box, it will no longer be crossed/greyed out and the amount will be added to the total at the bottom.

☐ Labor				$1,925.00
Lead Technician	Certified Lead Technician - Site Inspection & Management: X Hours	3.5		$0.00
First Additional Technician	Additional Technician: X Hours	3.5		$0.00
Second Additional Technician	Additional Technician: X Hours	3.5		$0.00
☐ PPE				$269.25
Biohazard Suit	Minimum 1 suit per technician per 4 hour period	3		$0.00
Disposable Foot Coverings	Minimum 2 layers per technician per 4 hour period	6		$0.00
Disposable Gloves	Minimum 2 pairs per technician per 4 hour period	6		$0.00

Upon receiving the Proposal, the customer can check one or both of these boxes.

Required Options

To make all or one optional items **Required**, when editing the Proposal scroll up. These check boxes appear at the top right when you are editing the proposal.
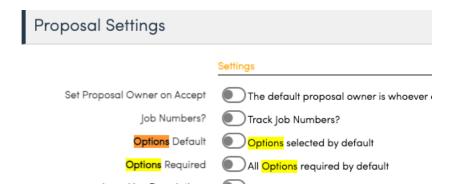
Opt	Req	Options Summary	
☐	☐	Labor	$1,925.00
☐	☐	PPE	$269.25
☐	☐	Call Type	$325.00
☐	☐	Equipment	$787.00
☐	☐	Disposal	$2,256.00
☐	☐	Chemicals	$225.00
☐	☐	Demo	$378.12
☐	☐	Post Job	$1,040.00
☐	☐	Pre Job	$325.00
		Selected Total	$0.00

> **i** You can add many options to a proposal and you will see them all reflected at the top, allowing you to choose as many as you want to be **Required**.

Troubleshooting

I don't have any checkboxes for Options on my Proposal.

If your options default accept with no selection box, go review your settings in **Control Panel > Proposals**. Look this section:

Proposal Settings

	Settings
Set Proposal Owner on Accept	⚪ The default proposal owner is whoever
Job Numbers?	⚪ Track Job Numbers?
Options Default	⚪ Options selected by default
Options Required	⚪ All Options required by default

You may have one or both of those turned on. Those will automatically make any Option on proposals selected already. If there is no option to deselect, then I think you probably have **Options Required** on.