

Proposals — SOP

How this module works

A professional-document generator and pipeline-tracker — build a client-ready proposal in seconds from a narrative template with real computed pricing, then track it from draft through client acceptance, all the way to an invoice.

SECTIONS

● All Proposals The full list — search, filter by status, and manage every proposal you've ever created.	● Pipeline A Kanban board of every proposal by stage — Draft, Sent, Accepted, Rejected — drag to move between stages.
● Analytics Win rate, average accepted value, monthly trend, and performance broken down by service.	● Service Catalog Your priced services by category — base cost stays internal, proposals are built by picking from this catalog.
● Narrative Templates Hand-written, industry-specific proposal copy. The New Proposal flow merge-fills one of these with client details and real pricing — no AI calls needed to create a proposal.	

STEP-BY-STEP WORKFLOW

- 1 Pick a Narrative Template that matches the client's industry and click New Proposal — a short form is all that's needed.
- 2 Pricing tiers are computed automatically from your Service Catalog's real prices, not estimated.
- 3 Share the proposal with the client — over WhatsApp or a copyable link, both point to the same live document.
- 4 The client's view, accept, reject, and comments are tracked in real time as they happen.
- 5 Once accepted, convert it to an Invoice in one click — no re-entering the same details.

CONNECTIONS

● Leads A lead's proposal history is pulled directly onto their profile, and Proposal Sent is a real stage in the Leads pipeline.	● WhatsApp Engine Sharing a proposal over WhatsApp goes through this same pipeline, with a personal WhatsApp-link fallback if the direct send isn't possible.
● Invoice Converting an accepted proposal creates a linked invoice automatically — no manual re-entry of client or line-item details.	● Sales Report / AI CFO Your proposal pipeline value feeds directly into both modules' own revenue-forecast figures.

● **Lost Deal Analyzer**

Flags a never-sent proposal as a specific, actionable reason behind a lost deal.