



PROPOSAL MANAGEMENT SYSTEM

Send a proposal that looks like you meant it.

Quotations assembled from reusable pages and themes, sent for acceptance, and tracked through a pipeline that shows who is winning and who is only busy.

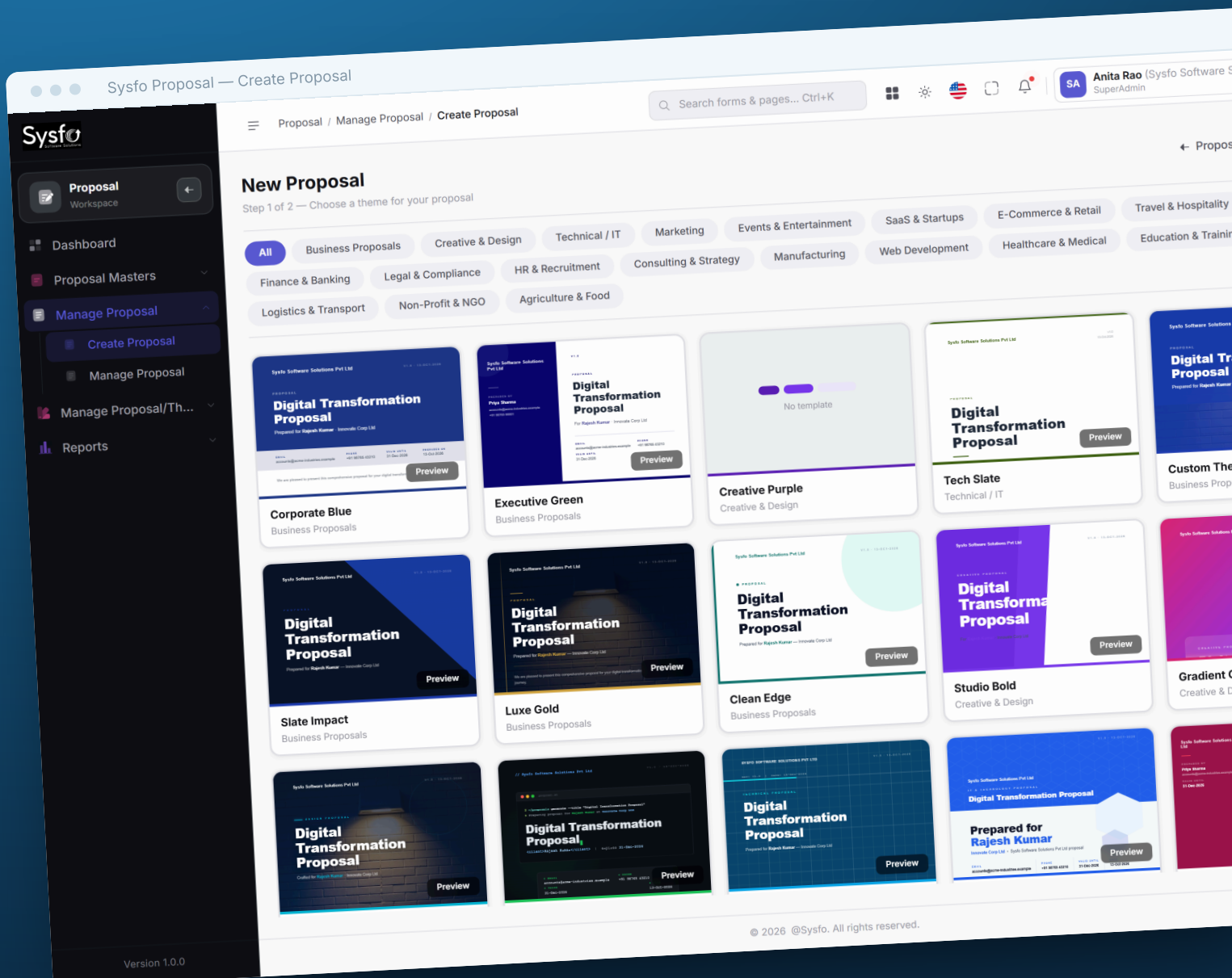
Pages

Themes

Commercials

Pipeline

Performance



WHY SYSFO PROPOSAL

Most of a proposal is the same every time.

Your company profile, your method, your terms, your exclusions — none of that changes between clients, yet it gets re-pasted from the last document every time, carrying the last client's name with it. Here those blocks are records, and only the parts that matter get written fresh.

10

screens in the module

3

pipeline &
performance reports

∞

reusable pages

1

theme change restyles
everything



Built from parts

A proposal is an ordered set of pages. Pick the ones this client needs, edit the one or two that are specific, and send.



Looks consistent

Themes control the look. Change the theme and every proposal restyles — without anyone touching the content.



Measured, not remembered

What is out, what is pending, what closed — and which salesperson actually converts the ones they send.

WHERE IT SITS

Between the enquiry and the order.

Enquiry

Captured,
assigned, followed
up.



Proposal

Assembled from
pages, themed,
sent.



Accepted

Marked won, with
the value recorded.



Sales order

Client, items and
taxes carried
forward.

The cost of re-pasting

A proposal built from the last one carries the last one's mistakes: a stale price list, superseded terms, and occasionally the previous client's name three pages in. It is the most common way a serious quotation loses credibility.

The cost of not measuring

Without a pipeline, "we sent a lot of quotes" and "we won a lot of work" feel like the same sentence. Recording value, stage and owner separates activity from results.

PAGES, THEMES & COMMERCIALS

Write it once; use it for the next hundred.

Pages Master holds the blocks every proposal draws on. Company-wise pages let each company in a group keep its own boilerplate, so one engine serves several businesses without them sounding alike.

The building blocks

- **Pages Master** — profile, approach, methodology, terms, exclusions, case studies.
- **Company Wise Pages** — the same slot, different wording per company.
- **Category Master** — group proposals by the kind of work.
- **FormType Master** — the shapes a proposal can take.
- **Manage Theme** — the look, independent of the words.

The part that is not boilerplate

- Line items with quantity, rate and discount.
- GST per line, totalled like an order.
- A validity period, so an old price cannot be held against you.

Commercials				PRP-00087
ITEM	QTY	RATE	DISC	AMOUNT
Annual Maintenance Contract 12 months, on-site	1	1,20,000	5%	1,14,000
Network switch 24-port	4	18,400	—	73,600
On-site installation	1	15,000	—	15,000
Taxable 2,02,600 · GST 18% 36,468				₹2,39,068
Valid to 11-Nov-2026 Theme: Corporate Blue · sent by Priya Sharma				<button>Send</button>

THE QUIET BENEFIT

Legal approves the terms page once.

When terms and exclusions live in a master instead of in each document, there is exactly one version in circulation — and updating it updates every proposal sent from tomorrow, without anyone being told to use the new file.

Category Master

Group proposals by the kind of work — services, supply, AMC — so the pipeline can be read one line of business at a time.

FormType Master

Different shapes for different sales: a one-page quotation and a full tender response are not the same document.

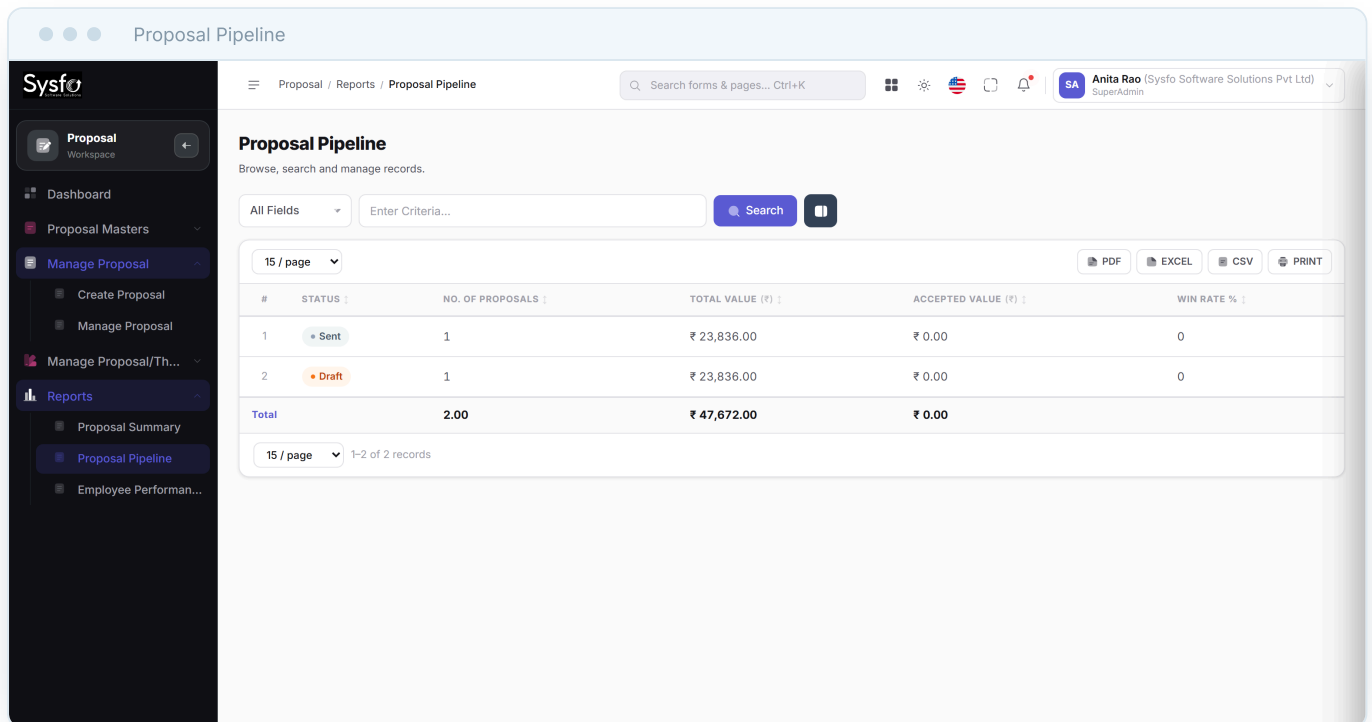
Company Wise Pages

Run several companies from one installation and each keeps its own profile, terms and tone — on the same proposal engine.

PIPELINE

What is out, what is closing, who is winning.

A proposal carries a client, a value, a date and an owner — which is everything a pipeline needs. The three reports turn that into a forecast and a performance picture.



#	STATUS	NO. OF PROPOSALS	TOTAL VALUE (₹)	ACCEPTED VALUE (₹)	WIN RATE %
1	Sent	1	₹ 23,836.00	₹ 0.00	0
2	Draft	1	₹ 23,836.00	₹ 0.00	0
Total		2.00	₹ 47,672.00	₹ 0.00	

Proposal Pipeline — what is out, with whom, for how much, and how long it stays valid.

Proposal Summary

How many went out in the period, for how much, and what happened to them.

Proposal Pipeline

What is still open, by stage and by value, with validity dates running down.

Employee Performance

Sent against won, per person — so volume and conversion are not confused with each other.

EVERY SCREEN IN THE MODULE

Create Proposal

Manage Proposal

Pages Master

Company Wise Pages

Category Master

FormType Master

Manage Theme

Proposal Summary

Proposal Pipeline

Employee Performance

All ten screens. Works on its own, or alongside the Enquiry module feeding it and Sales & Invoicing taking the won ones forward.

Validity is a commercial control

Every proposal carries a date it expires on. That protects the price when costs move, gives the follow-up call a legitimate reason to exist, and makes "lapsing" a reportable stage rather than silence.

Who is winning, not who is busy

Employee Performance separates sent from won. A salesperson who sends thirty and closes three, and one who sends eight and closes five, look identical on a volume report and nothing alike here.

GET STARTED

Make every proposal look like your best one.

We load your profile, approach, terms and exclusions as reusable pages, set up a theme in your branding, and train your team to assemble rather than re-paste.

1

Live demo

Building a proposal from pages, theming it, and the pipeline behind it.

2

Setup & data

Your boilerplate as pages, your categories, and a theme in your colours.

3

Training & go-live

The sales team, and the manager's weekly pipeline review.

COMPANY

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- ✓ Reusable pages instead of copy-paste
- ✓ Themes that restyle without touching content
- ✓ A validity date on every proposal
- ✓ Sent against won, per salesperson
- ✓ Company-wise boilerplate for a group
- ✓ Line items with discount and GST
- ✓ Pipeline by stage and value
- ✓ 10 ready screens and 3 reports