UtilizeCore

WORKFLOW GUIDE · PROPOSALS

From Vendor Quote to *Billed Proposal.*

One Work Order, two Proposals: the Vendor's is your cost, the Client's is your price. This guide is the whole path, from the Trip to the signed approval to the invoice, including what to do when the answer changes after the fact.

APPLIES TO

Estimators, account managers, directors who approve quotes, and whoever owns items and rates

BEFORE ANYTHING ELSE

A Proposal is a quote that becomes the invoice. Type it once: the Vendor's quote first, forwarded to the Client with your margin on it.

Forward to Client sends nothing. Evaluate is the send. Reject and Duplicate is how you change your mind.

P1	P2	P3	P4	P5	P6	P7
Work Initiation	Qualification and Planning	Assignment and Dispatch	Service Execution	Validation and Resolution	Financial Processing	Reconciliation and Closure



Five moves. The Trip first, the Vendor Proposal, Forward to Client, Evaluate, then Approved. The quote is typed once.

PART A · FOR WHOEVER OWNS ITEMS AND RATES

The setup gate.

Blank and $0 lines are the top proposal failure, and none of them are proposal problems. They are item and rate problems, seen first on the quote.

1 Items are simple, unique, and mirror accounting.

WHERE Products and Services › Items. One name per category; never the same name under Service and under Labor.

EXCEPTION Repair existed under both Service and Labor. The estimator picked the one with no rate and every labor line came out at $0.

CORRECTION The item list reads like the chart of accounts, and no name appears twice.

2 Site generic Client rates exist for every Service you quote.

WHERE Rates & Assignees › Per Hour and Per Service, Rate Level Site Default or Generic, Client side. See Pricing Setup, step 2.

EXCEPTION Labor rates were loaded only for one named Vendor at the Site. When that Vendor was not on the Trip, the line was $0.

CORRECTION A test Proposal on a Site with no named Vendor returns a labor rate.

3 The markup or margin default is the one the contracts use.

WHERE Company Settings › Workflow › Proposals › Proposal Creation.

EXCEPTION An estimator applied 15% margin to a contract that said 15% markup on parts. Every quote was high by the difference until the Client caught it.

CORRECTION The setting reads Markup or Margin as the contract says, and the worked example below matches a real quote.

	MARKUP	MARGIN
The formula	Price = Cost × (1 + rate)	Price = Cost ÷ (1 − rate)
15% on a $1,000 Vendor line	$1,150	$1,176.47
What the contract says	“Cost plus 15%”, “15% on parts”	“15% gross margin”, “GPM of 15”
Where it is set	Company Settings › Workflow › Proposals › Proposal Creation.	

4 The two permissions are on.

WHERE The Trip: Enable proposal creation for vendor. The role: the Invoices permission for anyone who adds Proposal lines.

EXCEPTION “Enable proposal creation for vendor” governs your ability to create a Proposal on the Vendor’s behalf. Off, the coordinator cannot key the quote.

CORRECTION The coordinator role can create a Vendor Proposal on a Trip and add lines to it.

5 Materials carry the right tax flag.

WHERE The item catalog, per item.

EXCEPTION Every material was flagged taxable on an account that passes tax through as one line.

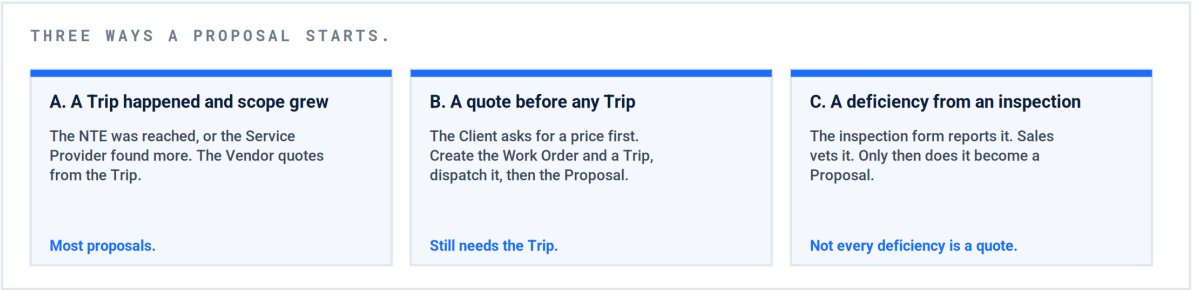
CORRECTION A test Proposal shows tax where the contract puts it.

> RESULT A test Vendor Proposal on your test Site carries a Trip number, every line has a rate, the forward applies the contract’s markup, and the tax lands where it should.

PART B · FOR THE ESTIMATOR AND THE APPROVER

Run it, end to end.

From the trigger to the approved Proposal on the Work Order, then what happens when the Client changes the answer.



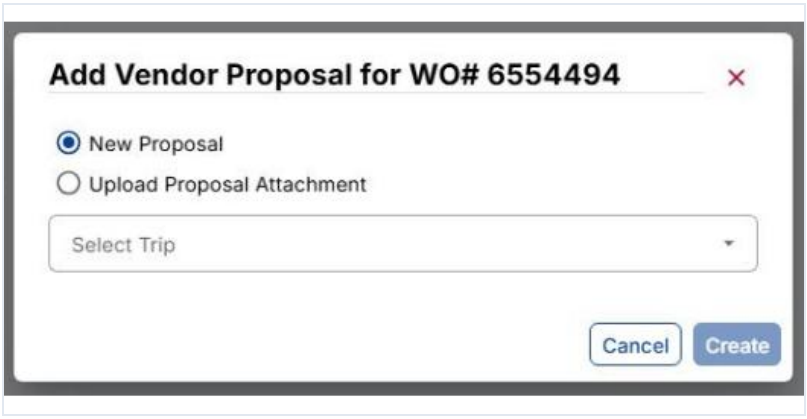
> **Where it starts.** All three end at the same place: a dispatched Trip with a Vendor Proposal on it.

P3 · ASSIGNMENT AND DISPATCH

The Vendor Proposal comes in.

The Vendor keys the quote on the Vendor Portal or the mobile app, or you key it for them from the PDF. Either way it is created from a dispatched Trip and lands at Received, in the Review Vendor Proposals Action Filter.

DO THIS	WHERE	PASS WHEN
Dispatch the Trip first	The Work Order › the Trip › Save & Dispatch	The Trip shows a Vendor and a dispatched status before any Proposal exists.
Create the Vendor Proposal from the Trip	The Trip › Proposals › + Vendor Proposal, or the Vendor does it on the Portal	The Proposal header shows the Trip number.
Itemize it	Labor with hours and rate, Materials, an item on each line	Every line has an item and a non-zero amount.
Approve the Vendor's price	Review Vendor Proposals Action Filter › Save & Approve	No blank line. Status Approved on the Vendor side.



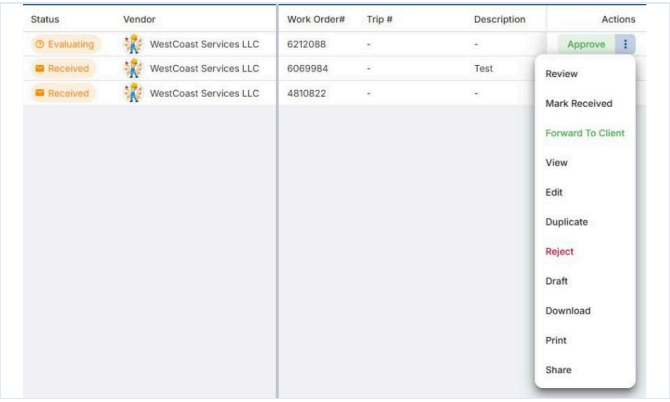
The + Vendor Proposal dialog. Select Trip lists only this Work Order's dispatched Trips; the Proposal is created against the one you pick, so the invoice can find it later.

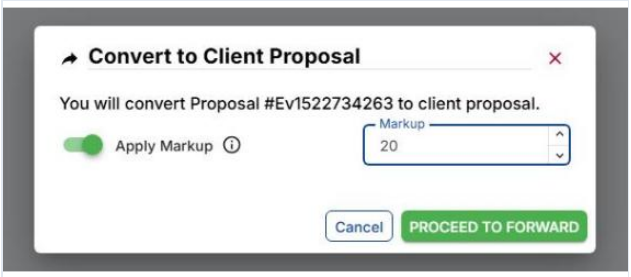
RESULT A Vendor Proposal tied to a dispatched Trip, itemized, with a rate on every line, approved on your side.

Forward to Client, then read the margin.

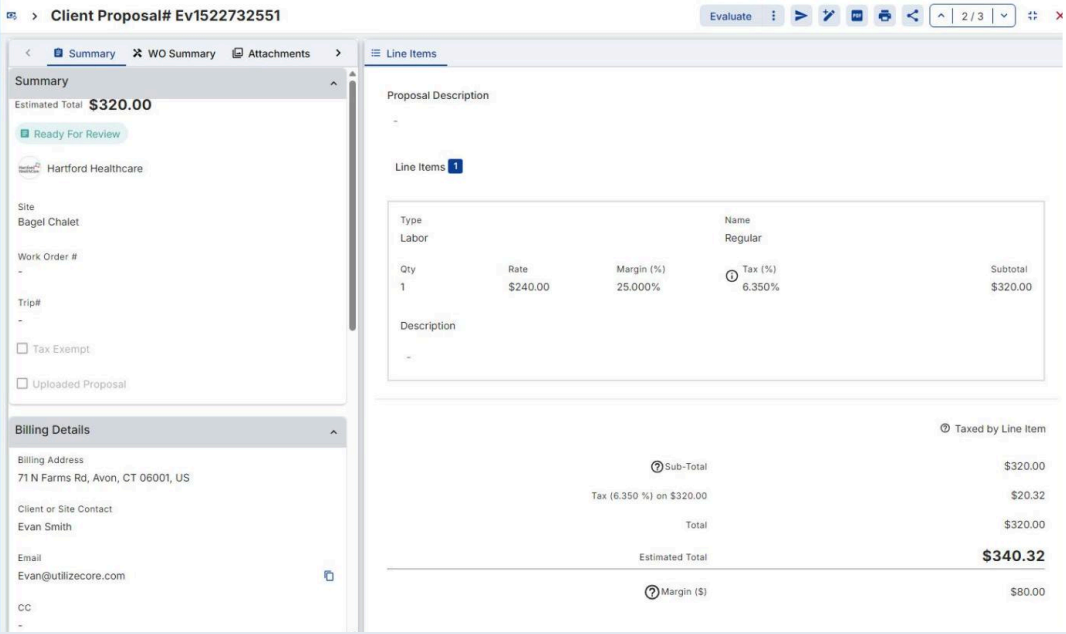
Do not build the Client Proposal. Forward the Vendor one. The three-dot menu on the Vendor Proposal carries Forward to Client; it asks for the markup or margin and creates a Draft Client Proposal with the same lines. It sends nothing.

DO THIS	WHERE	PASS WHEN
Forward	Vendor Proposal › three-dot menu › Forward to Client › the rate › Proceed	A Draft Client Proposal exists with the same line count. Nothing was sent.
Reprice labor	The Draft Client Proposal › the labor lines	Labor carries the Client's Per Hour rate, not cost plus markup.
Read the GPM	The Client Proposal, once it reaches Evaluate	Above the contract's floor. Below it, a wrong rate or a wrong item, not a bad quote.





Forward to Client. The three-dot menu on the Vendor Proposal, then the Convert to Client Proposal dialog: Apply Markup on, the rate the contract uses, Proceed to Forward. Nothing is sent.



The Client Proposal before Evaluate. Margin shows on every line and as a dollar total under the estimate. Read it here; EVALUATE in the header is the send.

RESULT A Draft Client Proposal with the Vendor's lines, labor repriced, ready for the ladder.

P5 · VALIDATION AND RESOLUTION

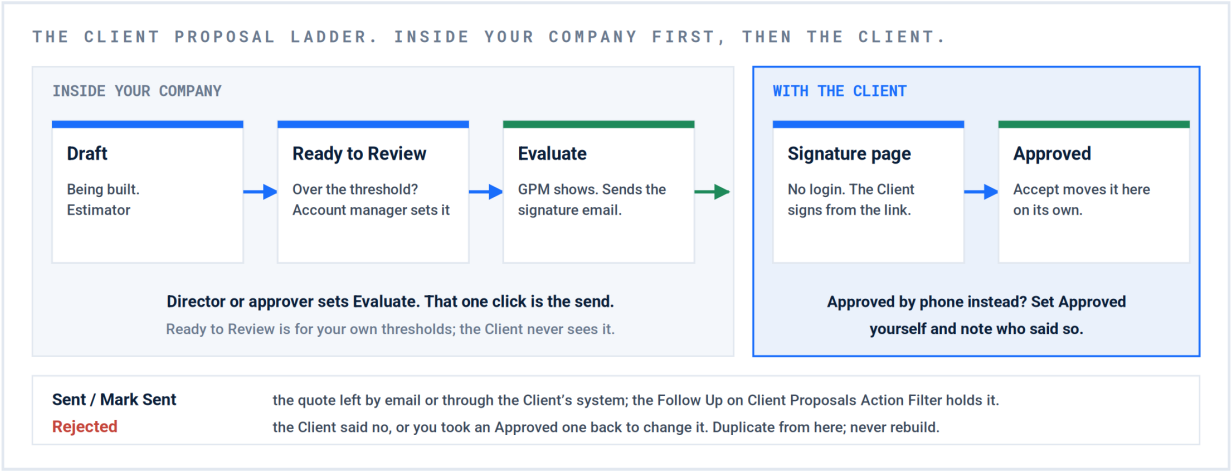
The ladder: from Draft to Approved.

P1	P2	P3	P4	P5	P6	P7
Work Initiation	Qualification and Planning	Assignment and Dispatch	Service Execution	Validation and Resolution	Financial Processing	Reconciliation and Closure

THE ONE THING TO KNOW

On the Client Proposal, Evaluate is the send. It emails the Client a signature page; when they accept, the status becomes Approved on its own.

Ready to Review is your internal step before it. Neither exists on the Vendor Proposal.



> **Inside your company first, then the Client.** The account manager sets Ready to Review, the approver sets Evaluate, the Client signs from the email without logging in. Approve by hand only when the yes came by phone.

DO THIS	WHO	PASS WHEN
Ready to Review	The account manager, when the quote is over the threshold your company set	Status Ready to Review. Still internal; the Client sees nothing.
Evaluate	The director or whoever approves quotes	The GPM shows, and the signature email has gone to the Client. The prompt to send it is on by default.
The Client signs	The Client, from the link in the email. No portal login, no user account needed.	Status Approved, with the signature on the record.
Approved by phone or in their system instead	You	Set Approved yourself and note who said so. Proposals do not cross a CMMS integration; a CMMS Client approves in their system and you set Approved here.
It went out by email or through their system	You	Mark Sent. The Follow Up on Client Proposals Action Filter holds it until an answer arrives.

> **UNDER THE THRESHOLD**
> A small quote does not need the ladder. Evaluate straight from Draft; the email still goes out and the GPM still shows. Ready to Review exists so that a director sees the big ones before the Client does.

> **RESULT** The Client Proposal at Approved, signed from the email or set by you with a name on it.

P5 · VALIDATION AND RESOLUTION

Put the approval on the Work Order.

P1	P2	P3	P4	P5	P6	P7
Work Initiation	Qualification and Planning	Assignment and Dispatch	Service Execution	Validation and Resolution	Financial Processing	Reconciliation and Closure

DO THIS	WHERE	PASS WHEN
Client NTE to the approved total	The Work Order header	NTE equals the Client Proposal total.
Vendor Trip NTE to the Vendor Proposal total	The Trip › the Vendor assignment › NTE	The Trip detail document the Vendor receives now shows the approved amount. That is the sign-off sheet.
Billing method Proposal, both sides	The Trip	Set before the repair Trip runs. Switching after incurred cost exists bills that cost twice.
Dispatch the repair Trip	The Work Order › + Trip › Save & Dispatch	The Vendor's approval email carries the Trip with its NTE.

RESULT Four edits done. The Vendor rolls with the approved amount on the sheet, and the invoice will read the approved lines.

P5 · VALIDATION AND RESOLUTION

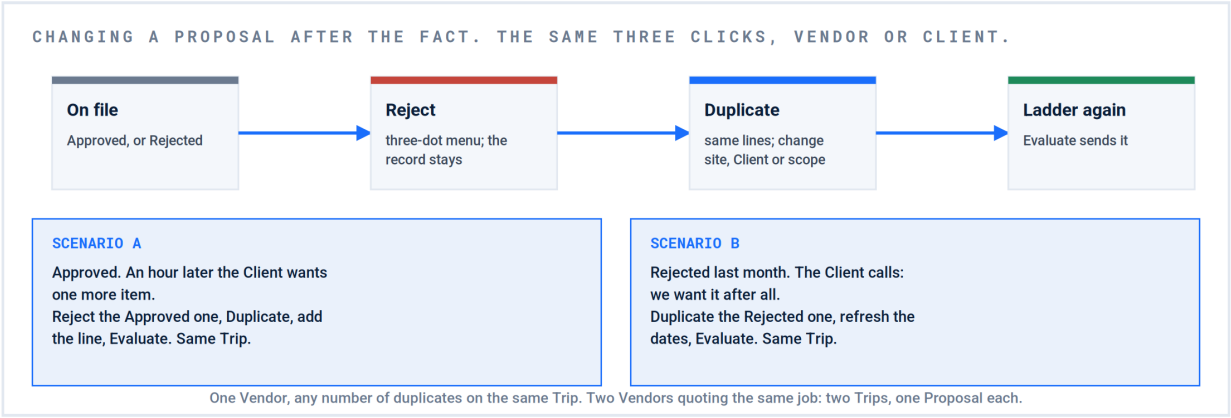
Change it after the fact: Reject, Duplicate, again.

P1	P2	P3	P4	P5	P6	P7
Work Initiation	Qualification and Planning	Assignment and Dispatch	Service Execution	Validation and Resolution	Financial Processing	Reconciliation and Closure

WHEN THE ANSWER CHANGES

Reject the one on file, Duplicate it, change what changed, and run the ladder again. The original stays as the record.

Same three clicks on a Vendor Proposal. The duplicate can go to a different Site or Client if the first one was filed wrong.



> **Two scenarios, one flow.** An Approved quote that needs one more line, and a Rejected quote the Client wants after all.

SITUATION	DO THIS	NOT THIS
Approved, then the Client wants a change	Reject the Approved one. Duplicate. Edit the copy. Evaluate.	Edit the Approved one; it is locked. Rebuild it line by line.
Rejected, then the Client says yes after all	Duplicate the Rejected one. Refresh dates. Evaluate.	Delete the Rejected one. It is the record of what was quoted.
The Vendor's price changed	Reject and Duplicate the Vendor Proposal, then Forward to Client again with the same rate.	Edit the Client Proposal alone; the GPM is now wrong.
Filed on the wrong Site or Client	Duplicate, and pick the right Site or Client in the dialog.	Start over.
A second Vendor quoting the same job	A second Trip for the second Vendor; one Vendor Proposal on each.	Two Vendors' Proposals on one Trip. One Vendor can duplicate on the same Trip as often as needed.

> RESULT One live Proposal per side, the old ones Rejected on the record, the Trip count equal to the Vendor count.

Who gets emailed, and how to change it.

EMAIL	GOES TO	TO STOP IT
Signature request, on Evaluate	The Client contacts on the Proposal	Answer No to the send prompt on Evaluate. The status still moves.
Approved and Rejected notices	The Business Email on the Client record, plus the Site contacts flagged to receive them	Per Client: clear the Business Email on the Client record and take the flag off the Site contacts. There is no single company-wide switch; ask your Customer Success team if you need one.
Vendor approval	The Vendor on the Trip	You want this one. Set the Trip NTE first so the sheet it carries shows the approved amount.

> **THE CLIENT ALREADY SAID YES BY PHONE**
> Set Approved yourself and the approval notice still goes to the Business Email. If a Client complains about it, the Client record is where it is turned off, not the Proposal.

Then bill it.

DO THIS	WHERE	PASS WHEN
Verify the Trip	Verify Trips Action Filter	Trip Verified.
Generate Invoices	Generate Invoices Action Filter	The Receivable and the Payable carry the approved lines exactly. A blank invoice means the Proposal has no Trip: edit it and pick the Trip.
Check the pennies	The synced invoice in your accounting system	Line totals match. A one-cent difference is rounding between the two systems, not a wrong line; see Invoicing: from verified Trip to paid.

> **RESULT** The invoice matches the quote, and Profitability on the Work Order reads the margin you saw at Evaluate.

Where this usually goes wrong.

#	WHAT YOU SEE	WHAT HAPPENED	THE FIX
1	**The invoice loads blank on an approved Proposal.**	The Proposal was created before the Trip was dispatched and carries no Trip.	Edit the Client Proposal, select the Trip. Dispatch first, always.
2	**Labor lines at $0.**	Rates only at Site Assignee or PM level, or a duplicate item name with no rate.	Site generic Client rates; one item name per bucket. Part A.
3	**The Client Proposal took as long as the Vendor one.**	It was typed, not forwarded.	Forward to Client, then reprice labor.
4	**Quotes high or low by a few percent.**	Margin applied where the contract says markup, or the reverse.	The Proposal Creation setting and the worked example in Part A.
5	**No margin anywhere.**	The Client Proposal never reached Evaluate.	Evaluate. It is the send and the margin in one click.
6	**The Client never got a signature email.**	Saved at Draft or Ready to Review; or No was answered on the send prompt.	Evaluate, and answer Yes.
7	**Approved, and the Trip blocked at the NTE.**	The Client NTE and Vendor Trip NTE were not updated after approval.	The four edits, every approval.
8	**The Vendor's sheet shows the old NTE.**	The Trip NTE was left at the dispatch value.	Set the Trip NTE to the approved Vendor total before the repair Trip goes out.
9	**Costs doubled on the Payable.**	The billing method was switched to Proposal after incurred cost was on the Work Order.	Set it before the repair Trip; never switch after.
10	**"I cannot edit an approved Proposal."**	Approved is locked by design.	Reject, Duplicate, edit the copy, Evaluate.
11	**The Client complains about an approval email they did not need.**	The Business Email on the Client record receives every approval and rejection notice.	Clear it, or take the flag off the Site contacts, per Client.
12	**Cannot add a second Vendor's Proposal.**	One Trip already carries a Vendor Proposal.	A second Trip for the second Vendor.
13	**Invoice a penny off from the quote in the accounting system.**	Rounding differs between the platform and the accounting system on some lines.	Not a wrong line. Reconcile at the total; see Invoicing.
14	**Tax on every material line.**	The item catalog flag, not the Proposal.	Fix the items.

What good looks like.

CHECKPOINT	EVIDENCE
Every Vendor Proposal carries a Trip number	The header shows it; the invoice will not load blank.
Every Client Proposal was forwarded	Same line count as its Vendor Proposal; the activity log shows Forward to Client.
Every quote over the threshold shows Ready to Review, then Evaluate, by two different people	The activity log names the account manager and the approver.
Approvals carry a signature or a name	Signed from the email, or Approved by hand with a note saying who said yes.
Approval reached the Work Order	Client NTE equals the approved total, Trip NTE equals the Vendor total, billing method is Proposal, and the repair Trip is dispatched.
Changes were duplicated, not rebuilt	Every revised quote has a Rejected original behind it.
The invoice matches the quote	Receivable and Payable lines equal the two Proposals.

QUESTIONS?

Contact your Customer Success team.

Or email **support@utilizecore.com** and a member of the team will get back to you.

UtilizeCore