



Proposal Journey in Proposal Builder

Alex Dan | 65 steps | 5 minutes

Dynamics

1 Navigate to the Proposal Management Dashboard

The dashboard displays a list of active proposals with columns for Name, Customer, and Status. It includes filters for Name, Customer, and Status. To the right are two funnel charts: one for 'Active Proposals' and another for 'Active Estimations', both showing the progression from Draft to Under Review and Internally Approved.

2 Click "New" to create a new proposal

The 'New' button is highlighted in orange on the top navigation bar of the Proposal Management Dashboard.

3 Select a customer

The customer list on the left side of the dashboard shows entries like 'City Rover & Light - CRM Implementation', 'Concord CRM Proposal - Dynamics 365 Sales', 'Concord Pharmaceuticals - D365 Customer Management for Concio', and 'Lead Management for Concio'.

4 Create a name for the proposal

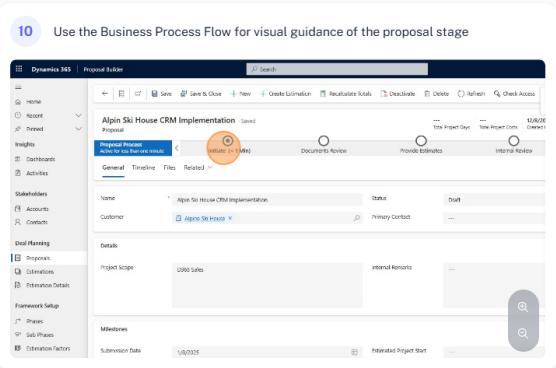
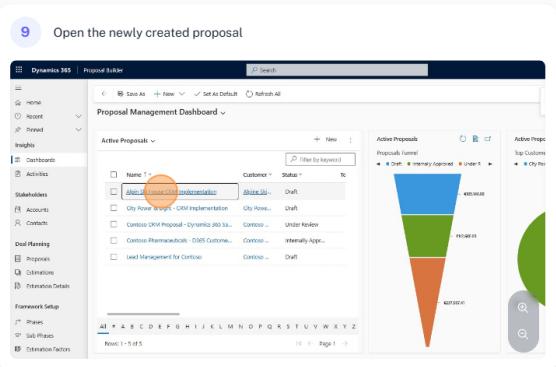
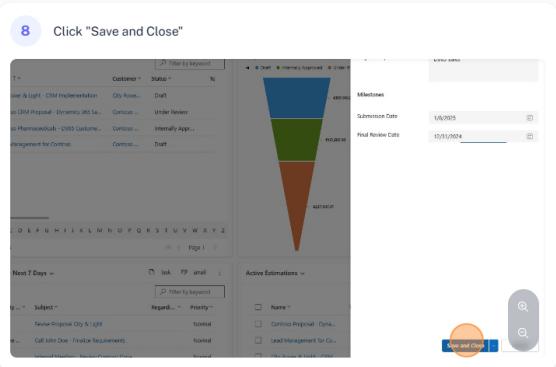
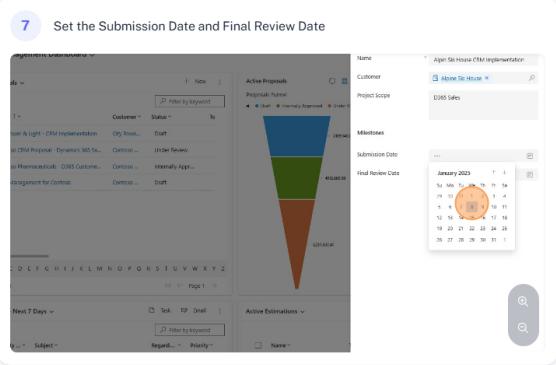
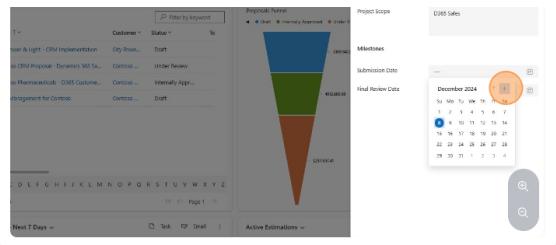
The 'Quick Create: Proposal' dialog box is open, showing the 'General' tab. The 'Name' field contains 'Alpin Ski House CRM implementation'. The 'Customer' dropdown is set to 'Alpin Ski House'. The 'Project Scope' section is collapsed.

5 Define the Project Scope

The 'Project Scope' tab is now selected in the dialog box. The 'Customer' dropdown is set to 'Alpin Ski House'. The 'Milestones' section is collapsed.

6 Click this icon.

The 'General' tab is selected again in the dialog box. The 'Customer' dropdown is set to 'Alpin Ski House'.



Alpin Ski House CRM Implementation

General Timeline Referrals

Initiate (< 1 Month)

Document Review

Provide Estimates

Internal Review

New Project Days

One Project Day

12/6/2014 T22 11 AM

Active for less than one month

Subscribed Date: 1/6/2012

Status: Draft

Primary Contact: [redacted]

Next Stage: [redacted]

Name: Alpin Ski

Customer: [redacted]

Project Scope: E990 Sales

Internal Remarks: [redacted]

Milestones:

Submission Date: 1/6/2015

Estimated Project Start: [redacted]

Estimated Project End: [redacted]

12 Select a date for the Project Start

Alpin Ski House CRM Implementation

Proposed Process

Active for less than one hour

Initiate (≤ 1 Min)

Documents Review

Proposed Process

Active for less than one hour

Timeline

General

Alpin Ski

Estimated Project Start

Estimated Project End

Customer

1/10/2023

December 2024

Status

Draft

Primary Contact

Internal Remarks

Details

Request Scope

DS03 Sales

Milestones

Submission Date

1/10/2023

Estimated Project Start

13 Select a date for the Project End

14 Move the Proposal Process to the "Next Stage"

A screenshot of the Microsoft Project Planner interface. The top navigation bar includes 'File', 'New', 'Save & Close', 'New', 'Create Estimate', 'Recalculate Total', 'Estimate', 'Review', and 'Check Access'. Below the navigation is a 'Project Plan' ribbon tab. A dropdown menu is open over a task named 'Initial Review' under the 'Alpin Ski House CRM Implementation' project. The dropdown shows the following details:

- Duration: 1 day
- Start Date: 1/8/2024
- End Date: 1/9/2024
- Status: Draft
- Primary Contact: [empty]

The 'Edit' button in the dropdown is highlighted with a red circle.

15 Complete the "Documents Review" stage by choosing if pursuing with the proposal (Go/No-Go Decision)

The screenshot shows the Microsoft Project Planner interface. A task named "Alpin Ski House CRM Implementation" is selected. The task details pane displays the following information:

- Step: Documents Review (~ 1.1 Miles)
- Status: In Progress
- Start Date: 1/6/2023
- Due Date: 1/26/2023
- Progress: 100%

A yellow circle highlights the "Next Stage" button at the bottom right of the task details pane. The overall interface includes a ribbon bar with tabs like Home, Insert, Page Layout, etc., and various project management tools like Gantt charts and resource management panels.

16 Fill out the Final Review Date

Alpin Ski House CRM Implementation

Final Review Date: 12/31/2024

Draft

Estimated Project Start: 2/26/2025

Estimated Project End: 5/30/2025

17 Add Internal Remarks (e.g. "Opportunity Management enter Quote Management enter Sales Insights License enter SharePoint Integration")

Internal Remarks:

Opportunity Management
Quote Management
Sales Insights License
SharePoint Integration

Estimated Project Start: 2/26/2025

Estimated Project End: 5/30/2025

+ Create Estimation From Template + New Estimation

18 Create an Estimation by clicking the button "Create Estimation From Template"

Internal Remarks:

Opportunity Management
Quote Management
Sales Insights License
SharePoint Integration

Estimated Project Start: 2/26/2025

Estimated Project End: 5/30/2025

+ Create Estimation From Template + New Estimation

19 Choose an Estimation Template that already has effort estimations

Estimation Template:

- Dynamics 365 Customer Service
- Dynamics 365 Field Service (Template)
- Dynamics 365 Sales (Template)
- User Management (Template)

Name: Dynamics 365 Customer Service (Template)

Total Hours: 472

Total Project Management Hours: 61

Total Design Hours: 110

Total Customization Hours: 135

Total Coding Hours: 24

Total Documentation Hours: 10

20 Click "Create Estimation" for creating a new estimation for the proposal based on the estimation template

Estimation Template:

- Dynamics 365 Customer Service
- Dynamics 365 Field Service (Template)
- Dynamics 365 Sales (Template)
- User Management (Template)

Name: Dynamics 365 Sales (Template)

Total Hours: 472.00

Total Project Management Hours: 61.00

Total Design Hours: 110.00

Total Customization Hours: 135.00

Total Coding Hours: 24.00

Total Documentation Hours: 10.00

21 Move the Proposal Process to the next stage

Timeline: Files: Related: **Move**

Active for less than one minute

Opportunity Management
Quote Management
Sales Insights License
SharePoint Integration

Estimated Project Start: 2/26/2025

Estimated Project End: 5/30/2025

22 Wait for approximately 30 seconds until the Estimation is created in the background and refresh the subgrid

23 The new Estimation is successfully created and linked to the proposal

24 Double-click the estimation in order to open its form

25 Review the Estimation and make adjustments if needed by opening the Estimation Details tab

26 Delete Estimation Details that are not needed

Quote Form Customization	4 - Implementat...	Quote Management	14.40	2.40	20.00	0.00
Initial Load	4 - Implementat...	Data Migration Des...	\$7.60	5.60	20.00	0.00

27 Click this button.

Phase (Hierarch)	Sub-Phase (Hierarch)	Total Estimate Detail Hrs.	Project Man...	Ind. Hours...	Design Hours...	Closure...	Costing Hours...
Customer Journey Mapping	1 - Discovery	Customer Journey...	8.00	4.00	0.00	4.00	0.00
Business Requirements Gathering	1 - Discovery	Business Requirements...	6.00	2.00	0.00	2.00	2.00
Effort	1 - Discovery	Current System Ass...	4.00	0.80	20.00	0.00	4.00
Data Migration Planning	• 2 - Planning	Data Migration...	■ 2.40	■ 2.40	20.00	0.00	2.00
Jan Book (Checklist)	2 - Planning	Project Scope Def...	8.00	4.00	0.00	4.00	0.00
Definition (User Stories)	2 - Planning	Budget and Cost E...	14.40	2.40	20.00	0.00	8.00
Licence Management and Setup	2 - Planning	Licence Management...	1.20	0.20	20.00	0.00	1.00
Technical Design Document Creation	3 - Design	Technical Design D...	9.60	1.60	20.00	0.00	0.00

28 Click "Delete Estimation Detail"

Phase (Hierarch)	Sub-Phase (Hierarch)	Total Estimate Detail Hrs.	Project Man...	Ind. Hours...	Design Hours...	Closure...	Costing Hours...
Customer Journey Mapping	1 - Discovery	Customer Journey...	8.00	4.00	0.00	4.00	0.00
Business Requirements Gathering	1 - Discovery	Business Requirements...	6.00	2.00	0.00	2.00	2.00
Effort	1 - Discovery	Current System Ass...	4.00	0.80	20.00	0.00	
Data Migration Planning	• 2 - Planning	Data Migration...	■ 2.40	■ 2.40	20.00	0.00	2.00
Jan Book (Checklist)	2 - Planning	Project Scope Def...	8.00	4.00	0.00	4.00	0.00
Definition (User Stories)	2 - Planning	Budget and Cost E...	14.40	2.40	20.00	0.00	8.00
Licence Management and Setup	2 - Planning	Licence Management...	1.20	0.20	20.00	0.00	1.00
Technical Design Document Creation	3 - Design	Technical Design D...	9.60	1.60	20.00	0.00	0.00

29 Click "Delete"

Phase (Hierarch)	Sub-Phase (Hierarch)	Total Estimate Detail Hrs.	Project Man...	Ind. Hours...	Design Hours...	Closure...	Costing Hours...
WS Prep Customer Journey Mapping	1 - Discovery	Customer Journey...	8.00	4.00	0.00	4.00	0.00
WS Prep Business Requirements Gathering	1 - Discovery	Business Requirements...	6.00	2.00	0.00	2.00	2.00
Analysis Effort	1 - Discovery	Current System Ass...	4.00	0.80	20.00	0.00	
WS Prep Data Migration Planning	• 2 - Planning	Data Migration...	■ 2.40	■ 2.40	20.00	0.00	2.00
Create An Book (Checklist)	2 - Planning	Budget and Cost E...	14.40	2.40	20.00	0.00	8.00
Backlog Definition (User Stories)	2 - Planning	Project Scope Def...	9.60	1.60	20.00	0.00	5.60
WS Prep Licence Management and Setup	2 - Planning	Licence Management...	1.20	0.20	20.00	0.00	1.00
WS Prep Technical Design Document Creation	3 - Design	Technical Design D...	9.60	1.60	20.00	0.00	0.00
Data Migration Complexity	3 - Design	Solution Architectu...	2.40	0.40	20.00	0.00	2.00
Load to Opportunity Sales Process (BPT)	4 - Implementation	Processes	31.60	5.60	20.00	0.00	1.00
Quota Form Customization	4 - Implementation	Quota Management	14.40	2.40	20.00	0.00	8.00
Initial Load	4 - Implementation	Data Migration Des...	\$7.60	5.60	20.00	0.00	4.00

30 Select another Estimation Detail and make adjustments directly from the editable grid (e.g. modify the Customization and Design Hours)

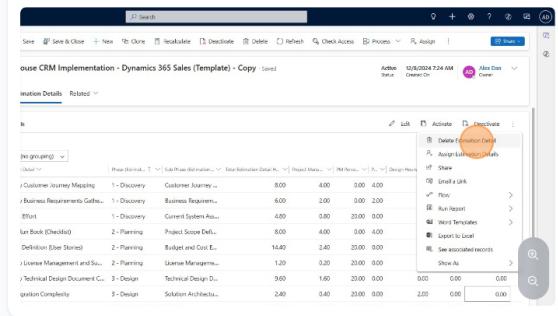
Phase (Hierarch)	Sub-Phase (Hierarch)	Total Estimate Detail Hrs.	Project Man...	Ind. Hours...	Design Hours...	Closure...	Costing Hours...
Customer Journey Mapping	1 - Discovery	Customer Journey...	8.00	4.00	0.00	4.00	0.00
Business Requirements Gathering	1 - Discovery	Business Requirements...	6.00	2.00	0.00	2.00	2.00
Effort	1 - Discovery	Current System Ass...	4.00	0.80	20.00	0.00	
Jan Book (Checklist)	2 - Planning	Project Scope Def...	8.00	4.00	0.00	4.00	0.00
Definition (User Stories)	2 - Planning	Budget and Cost E...	14.40	2.40	20.00	0.00	8.00
Licence Management and Setup	2 - Planning	Licence Management...	1.20	0.20	20.00	0.00	1.00
Technical Design Document Creation	3 - Design	Technical Design D...	9.60	1.60	20.00	0.00	0.00
Data Migration Complexity	3 - Design	Solution Architectu...	2.40	0.40	20.00	0.00	2.00
Opportunity Sales Process (BPT)	4 - Implementation	Processes	21.60	3.60	20.00	0.00	6.00
Quota Form Customization	4 - Implementation	Quota Management	14.40	2.40	20.00	0.00	8.00
Initial Load	4 - Implementation	Data Migration Des...	\$7.60	3.60	20.00	0.00	4.00

31 Make further adjustments by selecting multiple Estimation Details and delete them

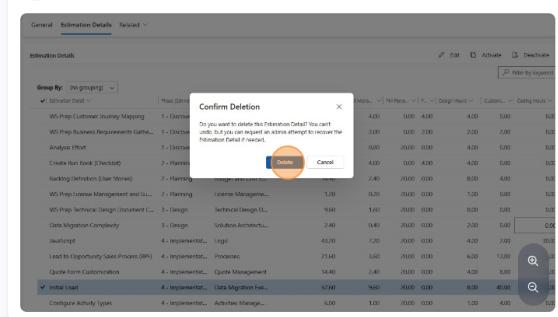
Phase (Hierarch)	Sub-Phase (Hierarch)	Total Estimate Detail Hrs.	Project Man...	Ind. Hours...	Design Hours...	Closure...	Costing Hours...
WS Prep Customer Journey Mapping	1 - Discovery	Customer Journey...	8.00	4.00	0.00	4.00	0.00
WS Prep Business Requirements Gathering	1 - Discovery	Business Requirements...	6.00	2.00	0.00	2.00	2.00
Analysis Effort	1 - Discovery	Current System Ass...	4.00	0.80	20.00	0.00	
Create An Book (Checklist)	2 - Planning	Project Scope Def...	8.00	4.00	0.00	4.00	0.00
Backlog Definition (User Stories)	2 - Planning	Budget and Cost E...	14.40	2.40	20.00	0.00	5.60
WS Prep Licence Management and Setup	2 - Planning	Licence Management...	1.20	0.20	20.00	0.00	1.00
WS Prep Technical Design Document Creation	3 - Design	Technical Design D...	9.60	1.60	20.00	0.00	0.00
Data Migration Complexity	3 - Design	Solution Architectu...	2.40	0.40	20.00	0.00	2.00
Opportunity Sales Process (BPT)	4 - Implementation	Processes	31.60	5.60	20.00	0.00	1.00
Quota Form Customization	4 - Implementation	Quota Management	14.40	2.40	20.00	0.00	8.00
Initial Load	4 - Implementation	Data Migration Des...	\$7.60	3.60	20.00	0.00	4.00

Item	Members	Description	Start Date	End Date	Planned Work	Actual Work	Cost	Completion %
Lead to Opportunity Sales Process (OPP)	4 - Implementer, Processes	21.60	5.60	20.00	0.00	0.00	0.0%	
Quote Form Customization	4 - Implementer, Quote Management	14.40	2.40	20.00	0.00	0.00	0.0%	
Initial Load	4 - Implementer, Data Migration Int.	57.60	9.60	20.00	0.00	0.00	0.0%	
Configure Activity Types	4 - Implementer, Activities Manage...	6.00	1.00	20.00	0.00	0.00	0.0%	
Customize Activity Views and Forms	4 - Implementer, Activities Manage...	6.00	1.00	20.00	0.00	0.00	0.0%	

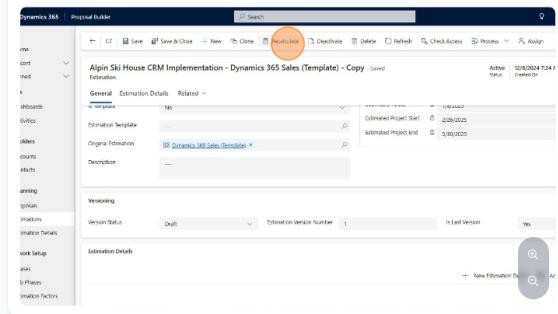
32 Click "Delete Estimation Detail"



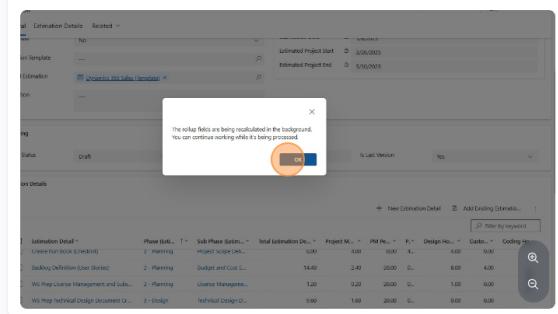
33 Click "Delete"



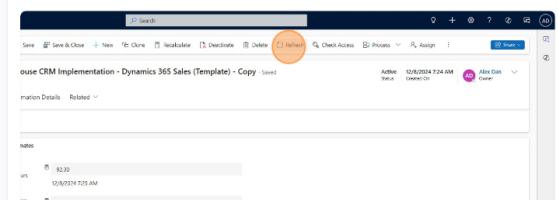
34 After adjusting multiple Estimation Details, trigger the recalculation of the Work Estimations by clicking from the command bar the "Recalculate" button



35 Click "OK"

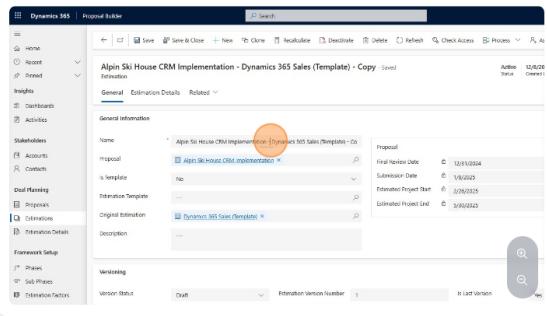


36 Click "Refresh" and the rollup fields are getting recalculated automatically in the background in few seconds

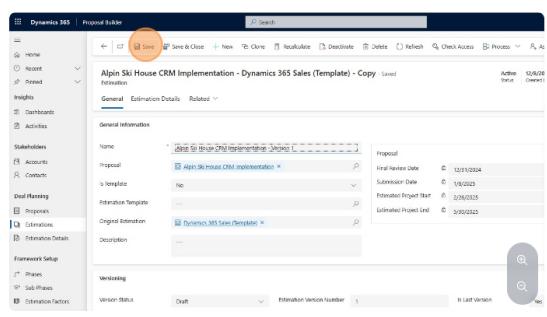




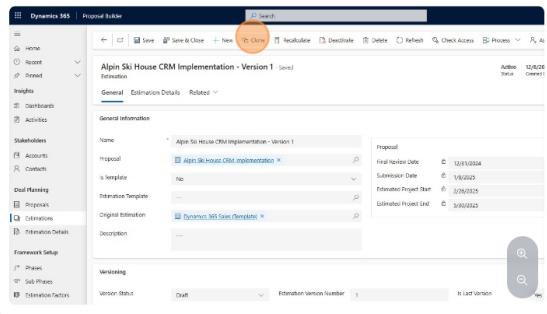
37 Adjust the Estimation name (if required)



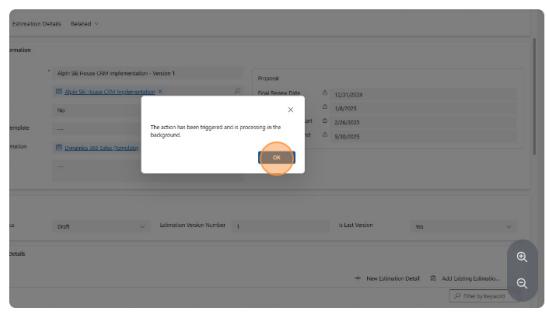
38 Click "Save"



39 If needed, create another version of the current estimation by clicking the "Clone" button



40 Click "OK"



41 Click "Refresh"