# **Proposal and Project Templates**

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# Overview

Templates are a time-saving way to generate **Proposals** and **Projects** for common services. Instead of manually copying a Proposal and reassigning it to a new customer, using a **Template** is faster and reduces errors.

- **Proposal Templates** are ideal for businesses that frequently use the same services and parts in their proposals.
- **Project Templates** are designed for **project-based businesses**, helping streamline multi-day jobs with defined steps (e.g., demolition, installation, clean-up).

# **Settings and Navigation**

- 1. Go to Control Panel > Parts/Add-Ons
- 2. Select "Templates" (top-right corner)

*Note*: You will need the correct permissions to create or edit Templates. If restrictions apply, consult your **Owner** or **Brand Administrator**.

# **Proposal Templates**

Proposal Templates are a time-saving way to generate proposals for frequently used services and parts. Instead of copying and reassigning a Proposal manually, using a **Template** ensures consistency and reduces errors.

Proposal Templates are best for:

- Businesses that frequently use the same services and parts in proposals
- Organizations with standardized offerings across multiple locations

### **Creating a Proposal Template**

1. Go to **Control Panel > Parts/Add-Ons** and click **Templates** in the top right corner.

Parts and A	.dd-ons 🛌				All Active	Search	D Upload Parts 🛃 Action	ns 🔻	Parts C	ategories Tem	olates So	lutions	Vendors
Page 1 of 2 (32 i	tems) 🕡 🕢	1 2	( )					_				Page siz	ze: 25 🔻
<u>Add</u>	Category	- 9	Subcategory 1	Ŷ	Subcategory 2	Ŷ	Name	Ŷ	Description 9	Unit Price 💡	Max Price	9 Uni	its <sup>(</sup>
Edit	Materials						Industrial Fan		Industrial Fa	50.00		Da	iy
Edit	Materials						Tile Flooring		tile flooring f	24.00		SF	
Edit	Labor/Service						Large Industrial Fan		Fan rental b	300.00			
Edit	Labor/Service						Carpet Rooms		Number of r	0.00			
<u>Edit</u>	Labor/Service						Labor		Labor	250.00			
Edit	Labor/Service						Remove Counters & Trim		Demo Day S	0.00			

2. Click Add. Then select "Proposal" as the template type. Add a Name and Description.

Create a Template	
Name*	Example Template
Active	
Туре	Proposal Project
Service*	Test Service
Description	Lorem ipsum dolor sit varius, nunc vel lorem ex ligula et urna. Sed
Quantity	
Customer Notes	
Attach Ad Hoc Form?	

- 3. Select the Service that will be used in this template. Select the Quantity for the service line.
- 4. If you will use the same Customer Notes or the same Ad Hoc Form every time, configure those here as well.
- 5. Start adding Parts (e.g., materials, services, labor)

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#	Option	Name	Description	Quantity	Internal	Zero Price
<b>∷ ⊗</b>		Example Part 1	Example Part 1	5		
<b>∷ ⊗</b>		Example Part 2	Example Part 2	3		
<b>∷ ⊗</b>		Example Part 3	Example Part 3	1		
😣				1		

- 6. Adjust additional fields:
  - Quantity Default quantity of the part
  - Internal Hide part from customer view
  - Zero Price Show if the part has a \$0 price
  - **Option** group line items into option groups
- 7. Click Save

Note: Items will appear in the **exact order** they are added. If order matters, enter them sequentially.

#### Using a Proposal Template

When creating a Proposal:

- Select the Option dropdown to view and apply an active template
- The template will auto-fill with predefined parts

• You can remove unnecessary items by clicking "X"

Option	Item	Description	Quantity	Rate	Amount
Select a template	Select a service T		1		\$0.00
		Taxable 🖌			
-option-	-part-	Search			
			Subtotal		\$0.00
			Tax	Example State Tax V	\$0.00
			Total		\$0.00
			Labor Hours		
			Demand		
	Select a template	Select a template	Select a template	Select a template	Select a service Image: Control of the service o

#### **Editing Proposal Templates**

- Users can edit **individual proposals** created from a template just like a proposal that has been created from scratch. View the proposal and click **Edit** at the top of the **proposals details page**.
- Proposal Templates can be updated at any time (if permissions allow) in Control Panel > Parts/Add-Ons > Templates.

## **Project Templates**

Project Templates are designed for **project-based businesses**, helping streamline multi-day jobs with defined work steps (e.g., demolition, installation, clean-up). These templates help organize work across multiple appointments.

Project Templates are best for:

- Multi-day installations where each day has different tasks
- Businesses that need to predefine work steps for project scheduling

#### **Creating a Project Template**

You'll use the same process to create both Proposal and Project Templates, with two differences (highlighted in blue).

- 1. Go to Control Panel > Parts/Templates > Add
- 2. Select "Project" as the template type

Create a Template	
Name*	Kitchen Remodel
Active	
Туре	Proposal Project
Service*	Build Stuff

- 3. Add a Title and Description
- 4. List out work steps (e.g., Demo, Paint, Install, Clean-up)

Parts/Add-Ons

#	Option	Name	Description	Quantity	Internal	Zero Price
		Demolition	Demo day	<i>/</i> / 1		
		Remove Counters & Trim	Demo Day Step	/ 1		
<b>∷ ⊗</b>		Sink Install	Sink Install	<i>"</i> 1		
<b>∷ ⊗</b>		Cabinet Framing	Cabinet Framing	<i>"</i> 1		
				1		

You may need to create new "**Parts**" that represent each step in the process for this project. If so, consider creating a new **Part Category** (e.g., "Work Steps") or use an existing category like **"Labor/Service."** 

## Using a Project Template

When scheduling a project with multiple appointments, the Project Templates will appear below Proposal Templates in the dropdown.

• The installer will see assigned work steps on their mobile app



• Each step aligns with a scheduled appointment in the project workflow

Proposal Customer Notes	iere are note	16					
Proposal §	/7/2023 (\$1.	135.00)					
Property Smoke Alarm	Move	Checkbox list	Other				
Number of Tree	s 24						
etails							
iem .		Description		Area	Qty	Rate	Amount
uid Shaff		Day one of installation	0		1	\$0.00	\$0.00
lemove Applionces		Demo Day Step Est. Duration 0 mins			10	\$0.00	\$0.00
emove Counters & Trim		Demo Day Step Est. Duration 0 mins			1	\$0.00	\$0.00
ear Out Cabinets		Demo day step Est. Duration 0 mins			,	\$0.00	\$0.00
latch Holes		Demo Day Step Est. Duration 0 mins			1	\$0.00	\$0.00
opy to Proposal							