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).

This article will review:

- Settings and Navigation
- Proposal Templates
- Project Templates

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.

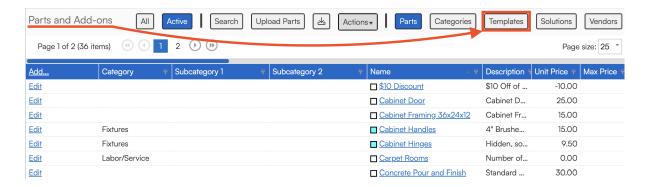


Proposal Templates are best for:

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

Creating a Proposal Template

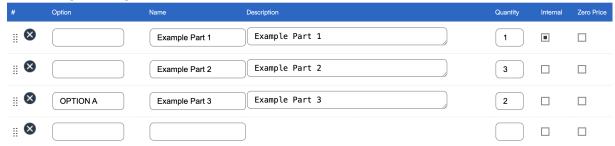
1. Go to **Control Panel > Parts/Add-Ons** and click **Templates** in the top right corner.



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



- 3. Select the Service that will be used in this template. Select the Quantity for the service line (typically 1).
- 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)

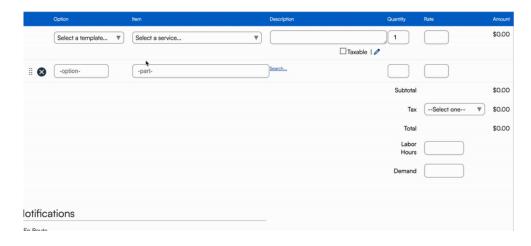


- 6. Adjust additional fields:
 - **Quantity** Default quantity of the part
 - $\circ \ \ \textbf{Internal} \mathsf{Hide} \, \mathsf{part} \, \mathsf{from} \, \mathsf{customer} \, \mathsf{view}$
 - Zero Price Show if the part has a \$0 price
 - Option group line items into option groups
- 7. Click Save

Using a Proposal Template

When creating a Proposal:

- Select the "Select a Template" dropdown under the Options column to view and apply an active template
- The template will auto-fill with predefined parts
- You can remove unnecessary items by clicking "X"



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 in Control Panel > Parts/Add-Ons > Templates.

Project Templates

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

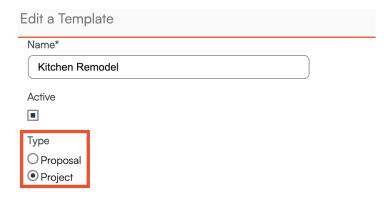
Project Templates are best for:

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

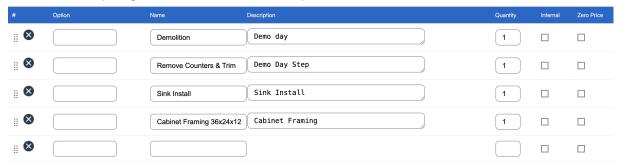
Creating a Project Template

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



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





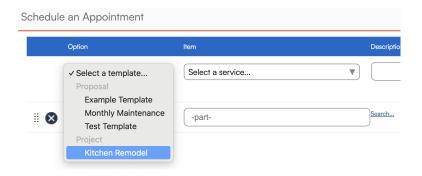
You will need to create "Parts" that represent each step in the process for this project. Consider creating a new Part Category (e.g., "Work Steps") or use an existing category like "Labor/Service."

Using a Project Template

Project Templates are available when scheduling appointments. They are not available to select when creating a proposal.

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



Details

Item	Description	Qty	Rate	Amount
Build Stuff	I'm going to build something fabulous in your abode.	1	\$0.00	\$0.00
Demolition	Demo day	1	\$2,300.00	\$2,300.00
Remove Counters & Trim	Demo Day Step	1	\$0.00	\$0.00
Sink Install	Sink Install	1	\$1,000.00	\$1,000.00
Cabinet Framing 36x24x12	Cabinet Framing	1	\$15.00	\$15.00
Copy to Proposal				