Proposals in the Mobile App

06/23/2025 11:11 am CDT

Overview

1. Find the Contact

From the **home screen**, use the search bar to find the customer. Type their name and press **Return** or tap the **blue magnifying glass** icon. Select the contact's name to open their **Contact Details** page.

2:09 🔌		all LTE 🗩
	Bob's Handyman Austin	≡
😕 fred rog	iers	Q
Breakdown	Checklist - Tue, Jan 23	>
Ad Hoc Tes	st - Fri, Dec 6	>
Carpet Cle	aning - Wed, Feb 19	>
My Schedu	le	>
Schedule		>
Calendar		>
At a Glance		
Sales Process		
∧ ∨ Done		
qwertyuiop		
a s	d f g h j	k I
φZ	xcvbn	m
123	space	return
		Ŷ

2. Start the Proposal

Tap the three-dot icon in the top right corner. Select Proposal from the menu.



3. Enter Proposal Details

Tap the **three blue dots** next to **"Select a Service"**. Choose a **proposal template** or manually select a **service** from the dropdown. Fill in details like **description**, **quantity**, **base price**, **and rate**. If using a template, parts will auto-populate.

1:51 🔌	all lte 🗩
< Service Line	
Test Service	
Template	
Test Template	\$
Service	
Test Service	\$
Description	
Sample description of service.	
Quantity	
1	
Base Price	
0	
Rate	
0	
Amount \$0.00	
	Apply >

4. Add Parts (If Needed)

Tap Add, then search for the part.Set whether the part is internal or optional. Adjust quantity, unit price, and duration as needed.

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<	Detail Line	
Search		
Category		\$
Part		\$
Description		
Internal Notes		
Internal		
Exchange		
Option		
Quantity		
Unit Price		
Extended		
		-

5. Review Tax and Totals

Below the parts, review the **subtotal**, **tax** (if applicable), **total**, and **duration**.

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<		Create a Proposa	≡
	Name	Fred Rogers >	
Ad	dress	4802 E 5th St. Au	stin, TX 78702
Lead So	ource	Referral	
Details	;		
Test Se Sample	ervice descrip	tion of service.	
=	3 Example Part 1 @ \$100.00 Example Part 1		00 🛄
=	3 Example Part 2 @ \$200.00		00
\equiv	2 Example Part 3 @ \$50.00 Example Part 3		0
Add Tap to a	Add Tap to add a new item		
Subtotal \$1,000		\$1,000.00	
Example State Tax >		\$86.30	
	Total		\$1,086.30
Duration 1 hour 30 min		hour 30 minutes	

6. Select Deposits and Payment Options

In the **Deposit** section, set a percentage or flat rate deposit that you'd like to collect.

If your organization offers **payment plans**, select one here.

Deposit		Deposit
Percent 30	%	Amount
Payment Plans		Payment Plans
1 DAY AFTER APPT? - Pick up waste service	e 🔿	1 DAY AFTER APPT? - Pick up waste service
12 Monthly Payments		12 Monthly Payments
2 Payments - Installment		2 Payments - Installment
3 equal payments		3 equal payments
3 Monthly Payments		3 Monthly Payments
50% Deposit		50% Deposit
Pay In Full		Pay In Full
Pay in full - get 5% off		Pay in full - get 5% off
Pay In Full (No Deposit)		Pay In Full (No Deposit)

7. Adjust Proposal Settings

Edit the proposal title, duration, date, internal notes, and customer-facing notes.

1:51 🔉 🔐 and LTE (_)			
Create a Proposal	≡			
3 Installments	\bigcirc			
Quarterly by Appt				
Required?				
Sattings				
Settings				
Title				
Duration				
1 hour 30 minutes				
Date 03/12/2025				
Internal Notes				
Customer Notes				
Delivery				
Email to beautifulday@bemyneighbor.com				
Text message to (143) 143-1432				
Save & Send Save My Sch	edule			

8. Send or Save the Proposal

Under **Delivery**, choose to send via **email or text** (two-way texting must be enabled). At the bottom of the page, select:

Save & Send – Sends the proposal.

Save – Saves without sending.

My Schedule - Exits without saving.

Schedule From a Proposal

Once the proposal has been accepted, you can click the three dots in the top right corner and select **Schedule**.



On the next page, you will be able to review the contact information as well as the service and parts included from the proposal.

Click Add to add new parts (line items) to the appointment.

1	Kitchen	\$79.00	\$79.00
	Clean full kitchen including stove, oven and major appliances.		
Add.	•••		
Tap t	o add a new item		
		Subtotal	\$129.00

Select a Date and Timeframe for the appointment.

Select whether or not the appointment will be: Ad Hoc (scheduled manually, disregarding system scheduling settings) or **Queued** (penciled in for a date, knowing you need to come back later and schedule it for a time with a service agent).

Select any agent from the list of Available Slots. Filter by Service Agent using the search box in the orange bar.

<	Schedule Proposal	≡
Date	06/12/2025	
Ad Hoc		\bigcirc
Queued		\bigcirc
Timeframe		
Available S	lots Q Filter agents	
Thu, Jun 12, 2 Gmail Agent 19 hours 15 m	2025 at 6:00a ninutes	
Thu, Jun 12, 2 Monroe Agen 19 hours 15 m	2025 at 6:00a t ninutes	

Optionally, choose any additional agents that need to be on the appointment.

Available Slots		ď
Britney Bowen - 6/12/2	25 9:45 AM	0
Additional Agents	Q Filter agents	
Bonnie McMurray		
Cody Test Agent		
Demo Agent		•••

Select whether or not you want to schedule the appointment as Tentative.

Choose to send a confirmation email or text (if two-way-texting is enabled.

Tentative	\bigcirc
Confirmation to anotherfakeemail@wha	atever.com <
	Schedule!

Click Schedule!