

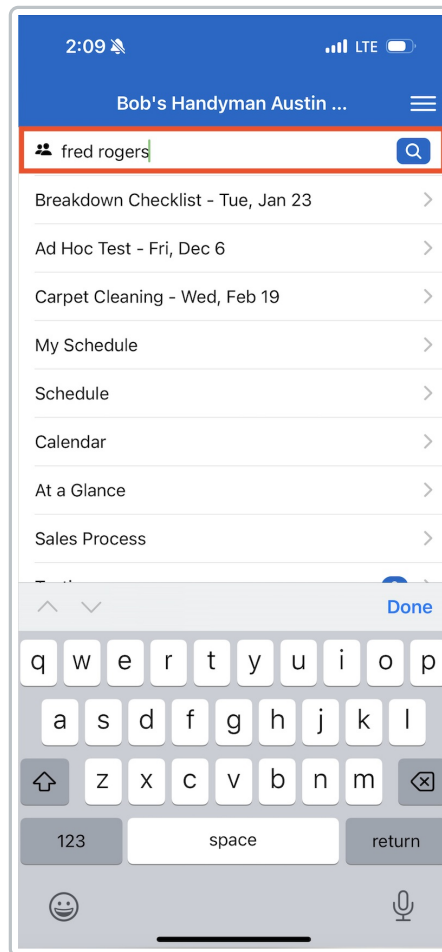
Proposals in the Mobile App

03/12/2025 4:51 pm CDT

Overview

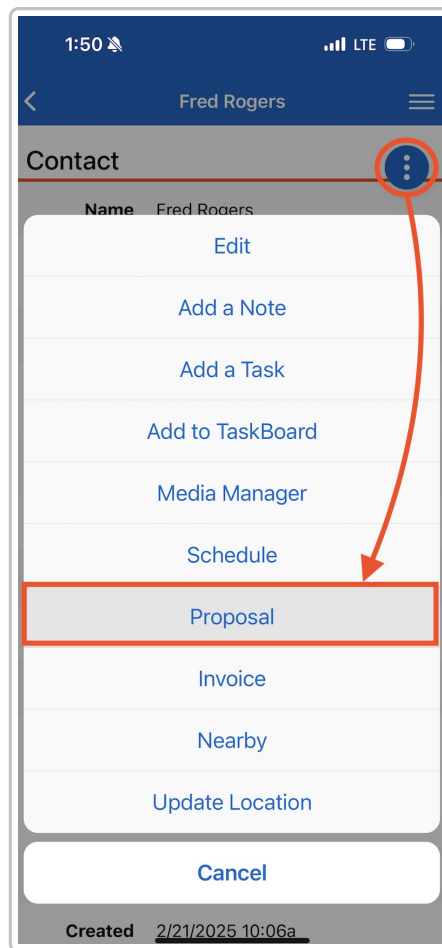
1. Find the Contact

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. 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

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.

2:00

LTE

<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**.

1:51
LTE

<
Create a Proposal

Name Fred Rogers >

Address 4802 E 5th St. | Austin, TX 78702

Lead Source Referral

Details

Test Service
Sample description of service.

3 Example Part 1 @ \$100.00
Example Part 1

3 Example Part 2 @ \$200.00
Example Part 2

2 Example Part 3 @ \$50.00
Example Part 3

Add...
Tap to add a new item

Subtotal \$1,000.00

Example State Tax > \$86.30

Total \$1,086.30

Duration 1 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	Amount
30 %	\$
Payment Plans	Payment Plans
1 DAY AFTER APPT? - Pick up waste service <input type="radio"/>	1 DAY AFTER APPT? - Pick up waste service <input type="radio"/>
12 Monthly Payments <input type="radio"/>	12 Monthly Payments <input type="radio"/>
2 Payments - Installment <input type="radio"/>	2 Payments - Installment <input type="radio"/>
3 equal payments <input type="radio"/>	3 equal payments <input type="radio"/>
3 Monthly Payments <input type="radio"/>	3 Monthly Payments <input type="radio"/>
50% Deposit <input type="radio"/>	50% Deposit <input type="radio"/>
Pay In Full <input type="radio"/>	Pay In Full <input type="radio"/>
Pay in full - get 5% off <input checked="" type="radio"/>	Pay in full - get 5% off <input checked="" type="radio"/>
Pay In Full (No Deposit) <input type="radio"/>	Pay In Full (No Deposit) <input type="radio"/>

7. Adjust Proposal Settings

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

The screenshot shows a mobile app interface for creating a proposal. At the top, the status bar displays the time 1:51, LTE signal, and battery level. The app header is blue with a back arrow, the title 'Create a Proposal', and a menu icon. Below the header, there are three toggle switches: '3 Installments', 'Quarterly by Appt', and 'Required?'. A red section header 'Settings' is followed by input fields for 'Title', 'Duration' (set to '1 hour 30 minutes'), and 'Date' (set to '03/12/2025'). Below these are text areas for 'Internal Notes' and 'Customer Notes'. Another red section header 'Delivery' is followed by two radio button options: 'Email to beautifulday@bemyneighbor.com' and 'Text message to (143) 143-1432'. At the bottom, there are three blue buttons: 'Save & Send', 'Save', and 'My Schedule'.

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.