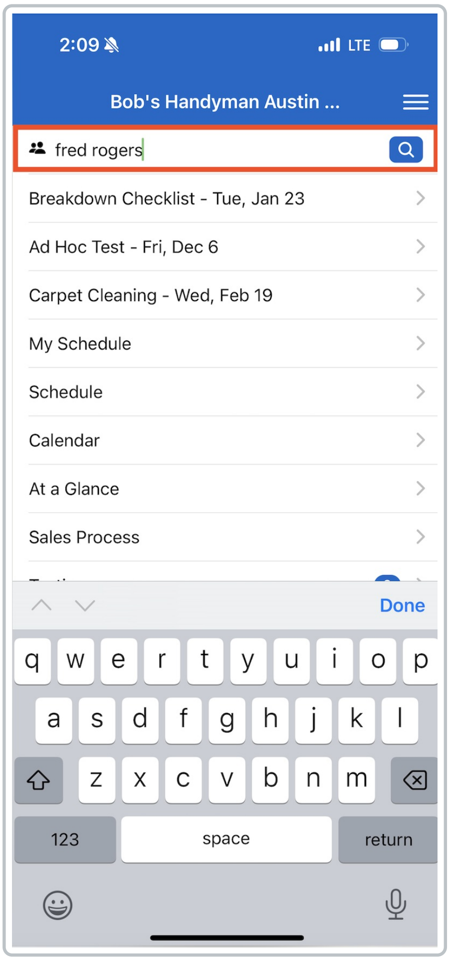
Proposals in the Mobile App

03/12/2025 4:51 pm CDT

Overview

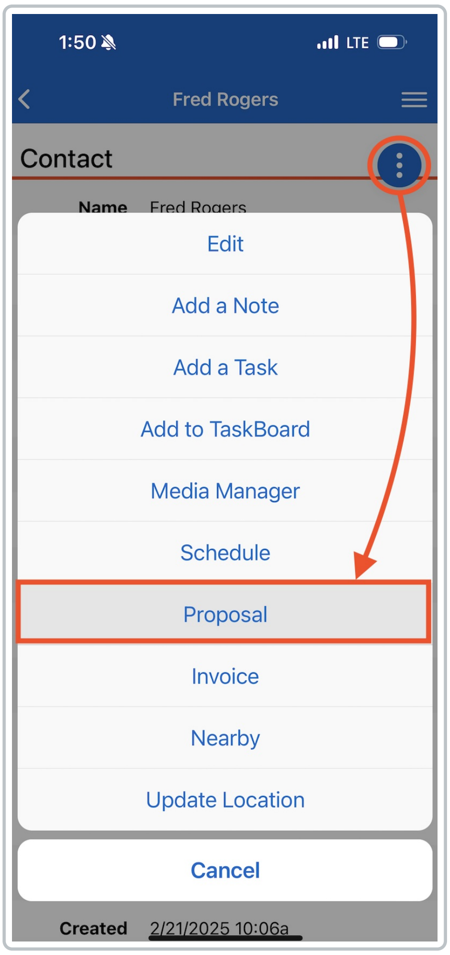
1. Find the Contact

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.



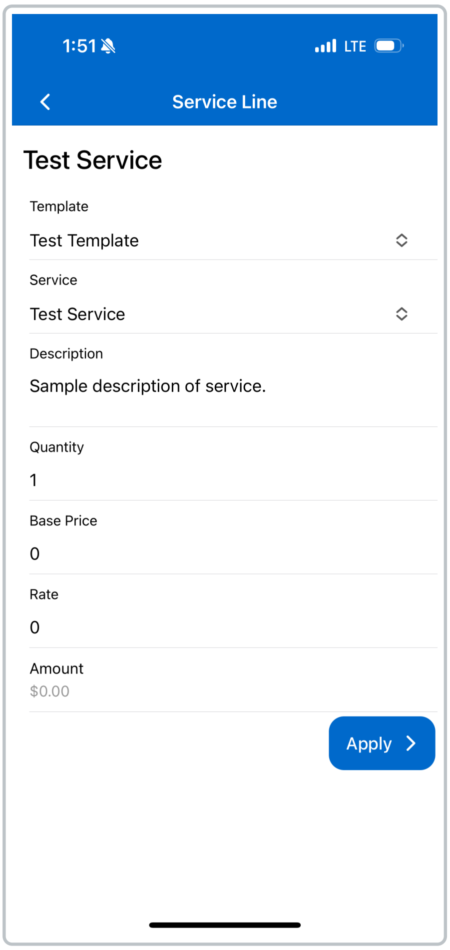
2. Start the Proposal

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



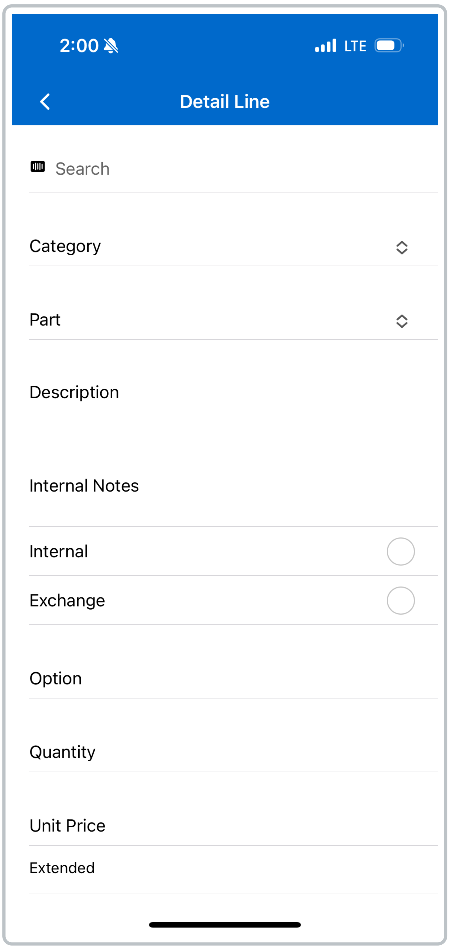
3. Enter Proposal Details

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.



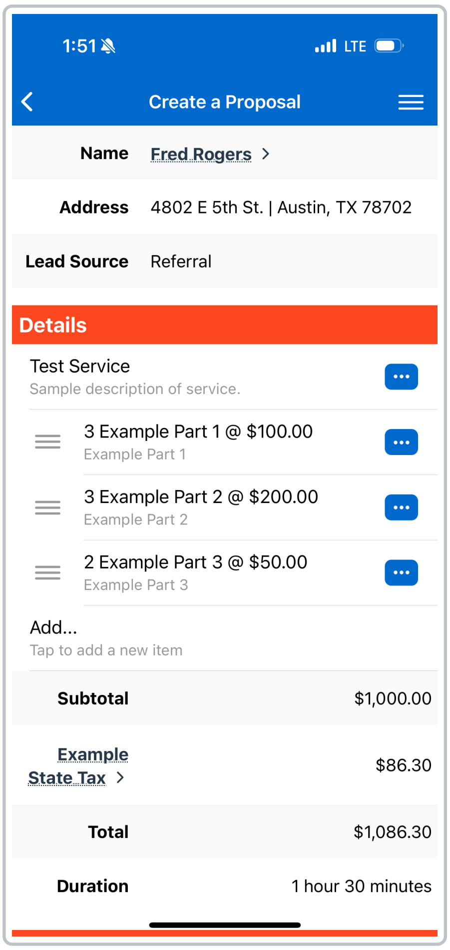
4. Add Parts (If Needed)

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



5. Review Tax and Totals

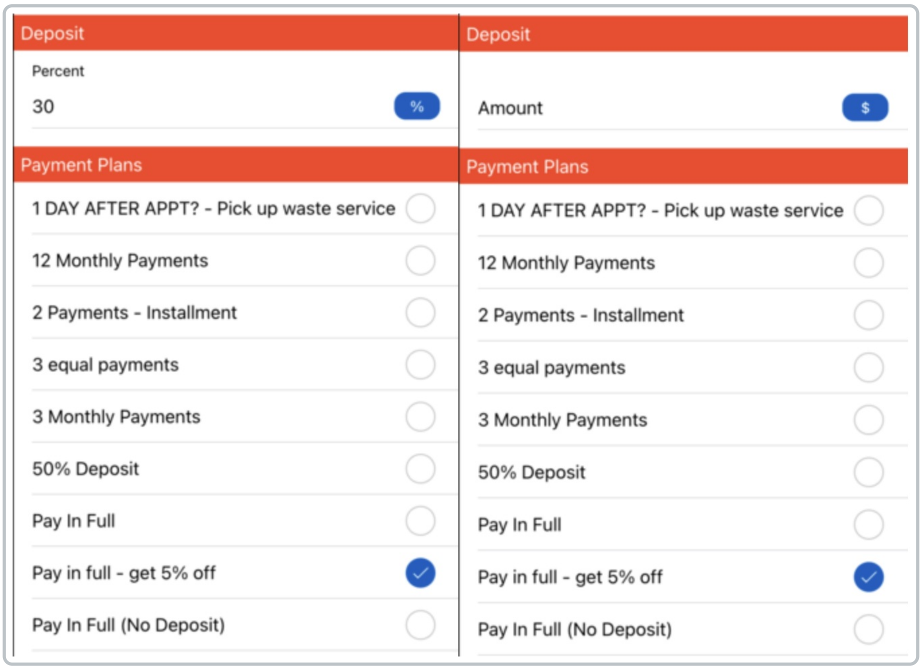
Below the parts, review the **subtotal**, **tax** (if applicable), **total**, and **duration**.



6. Select Deposits and Payment Options

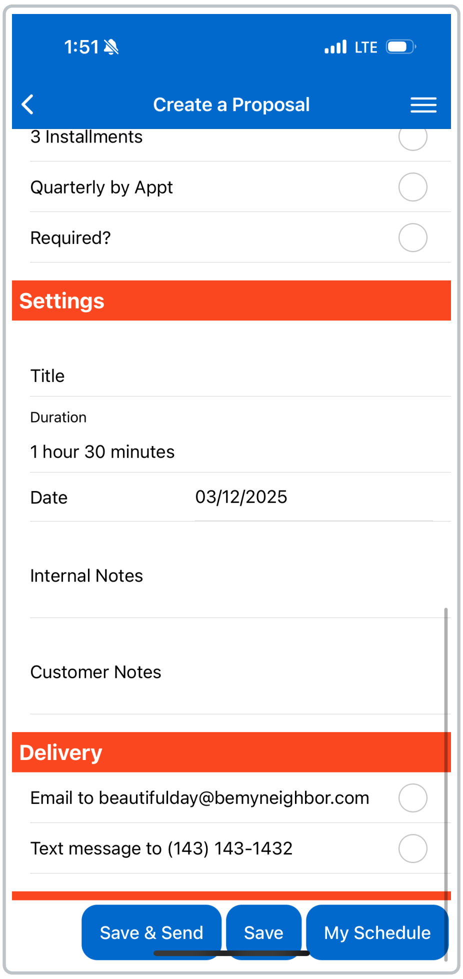
In the **Deposit** section, set a percentage or flat rate deposit that you'd like to collect.

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



7. Adjust Proposal Settings

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



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.