Sales

- Creating a Fuel Contract
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- Creating a Proposal

Creating a Fuel Contract

2. Creating a Fuel Contract (Fixed / Capped Rate)

1. In the customer's account, go to the **Service** tab.
2. Select the **+ New Proposal** button.
3. Click **Fuel Contract**.
4. Select the fuel the customer is looking to get a contract for (e.g., Oil).
5. Select the price mode or contract they are looking for (e.g., Fixed Rate, Price Protection).
6. Type in the locked price and number of gallons.
7. Select the contract term you want the contract to be active for.
8. Add in an enrollment fee, if applicable.
9. Add in the offer expiration.
10. Select a template if you have a specific one for your company that you'd like the customer to see when reviewing the fuel contract.
11. When finished, select **Preview**.
12. Review the information to ensure it is correct.
13. Click **Create Fuel Contract Proposal**.
14. Open the proposal.
15. From this screen you can:
    - Edit the contract if needed.
    - Email the PDF to the customer.
    - Create your own PDF.
    - Hide this contract from the customer's portal.
16. As with quotes, there is an option to record the signature for the customer if they are unable to sign on their end (no email or computer access).

> **Note:** To get back to this page once you leave it, go to **Service** in the customer's account and move from **Projects** to **Proposals**, then select the one you'd like to open.

Creating a Budget Proposal

3. Creating a Budget Proposal

1. In the customer's account, go to the **Service** tab.
2. Select the **+ New Proposal** button.
3. Click **Budget**.
4. Title it.
5. Select the budget that's built into your account for your company (e.g., "12-Month Budget Plan").
6. Select the template.
7. Choose the budget period.
8. Add any promotions, if applicable.
9. Add in the forecast strategy (how the gallons are calculated for deliveries to estimate the budget period).
10. Select the fuels this will be used for.
11. Add in any downside protection, if applicable.
12. Select **Preview**.
13. Finish.

Creating a Proposal

Creating a Proposal

1. Go to the account you are creating a proposal for.
2. Go to **Service**.
3. Click the **+ New Proposal** purple button.
4. Select **Quote**.
5. If using a pricebook, toggle to **Pricebook**.
   - Your company must be affiliated with a third party that inputs parts and prices into the system (e.g., Profit Rhino).
   - If you are not affiliated, choose **Custom Quote** instead.
   - Custom Quote also lets you build your own quote from scratch.
6. Add in the concern (e.g., "Installing a new 500g propane tank").
7. Title your quote (e.g., "500g Propane Tank").
8. Add a summary if wanted (e.g., "Installing a 500g above ground propane tank serving the garage, placed 15 feet from the back corner of the garage, next to the white fence.").
9. Choose the template you'd like.
10. Open the proposal.
11. Select the valid dates for the proposal — the window the customer has to sign before it expires.
12. Save changes.

> **Note:** The proposal is hidden from the customer portal until you click the green **Show to Customer** button. Once clicked, the status changes to **Pending** and the customer can view the proposal from their end.

Adding Scope

1. Click **+ Add Scope**.
2. Choose a title (e.g., "Propane Tank Install").
3. Add in the price.
4. Select the applicable tax.
5. Toggle on what you want shown in the proposal:

- For a breakdown, toggle on **Show Line Items** and **Show Materials**.
- To hide the breakdown, keep these toggled off.
- To mark the scope as optional, toggle on **Mark Optional**.
- These settings can be edited later if needed.

6. Add line items by clicking **+ Add Items**.
7. Add materials by clicking **+ Add Materials**, or add a premade kit if the job involves a kit already built in Kozy.

Sending and Signing

1. Once the proposal is built, scroll up to **Email PDF** or **Generate PDF** if you'd like to download it for your own reference.
2. Click **Show to Customer** if you'd like them to view and sign the proposal on their personal portal.
3. If the customer does not have a portal or email, you can record the signature yourself by clicking the green **Record Signature** button.
4. If the customer signs through the portal:
   - The overview will auto-update.
   - You will receive an email from the address affiliated with Kozy notifying you that the customer has signed from their portal.
   - The status will change from **Draft** → **Pending** → **Signed**.

Creating a Project from a Signed Quote

1. Once signed, click **Create Project** from the signed quote.
2. Go to **Service**, then **Open Projects**, and choose the project you just made from the quote.
3. From here you can edit the date, add notes for technicians or dispatch, or add parts.

Charging a Deposit

1. If the job requires a deposit, go to the customer's account and click **Billing**.
2. Go to the **Payments** section and choose **View All**.

3. Find the credit card the customer wants to use for the down payment and click the green **$** button.
4. Type in the deposit amount and click **Charge**.
5. Result of the charge:
    - If the charge goes through, it will be added to their account.
    - If declined, the system will notify you with a red pop-up in the top right corner stating the payment did not go through.