Creating a Proposal

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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.

Giving the Customer Options

- To give the customer a choice, put two or more scopes in the same choice group. The customer signs for exactly one option in each group.
- Scopes outside a group are required, or add-ons when marked optional.
- Total investment is the required work plus the lowest-priced option in each group. The with-all-options figure uses the highest-priced option in each group.
- The proposal prints with your letterhead, lettered option cards, an investment summary, and issue and valid-until dates.
- For a service agreement or delivery authorization tied to a customer's service, use the **Agreement** proposal type.

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.

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