

COPYING A PROJECT TEMPLATE TO A CUSTOMER ACCOUNT

How to copy a “Project Template” to a “Customer” account in the CRM

This includes the “Proposal & Contract Templates”

Step 1. Starting in the Main Menu click on “Customers” this will show you all your customers. Next, look for the customer labeled “My Template Account” and choose it so it will open that account profile, alternatively you can “Search” for this name in the search box to the right of the screen.

The screenshot displays the GoMoverz CRM interface. On the left sidebar, the 'Customers' menu item is highlighted with a red box. The main content area shows a 'Customers' section with a search bar and a table of customer records. A red arrow points from the search bar to the 'My Template Account' entry in the table. Another red arrow points from a search box to the 'My Template Account' entry in the table.

start typing the customer name here and choose from the dropdown

#	Company	Primary Contact	Primary Email	Phone	Active	Groups	Date Created	Realtor Group
3	Person - View Profile	Vickie Jackson	vjacksonrealestate@gmail.com	(707) 208 9961	Active	Residential Client, Realtor	12/11/2024 6:18 AM	ReMax
4	Person - View Profile	Peter Enzinger	penzinger@outlook.com	(415) 818-2423	Active	Residential Client	12/11/2024 8:34 AM	
6	Person - View Profile	Pamela Loar	pamelaloar@gmail.com	510-409-2746	Active	Residential Client	12/13/2024 9:57 AM	
7	Person - View Profile	Cathy French	dianefre1100@gmail.com	(509) 435-5840	Active	Residential Client	01/08/2025 9:43 AM	
10	Person - View Profile	Sally Field	sallyfield@gmail.com	415-457-8754	Active	Residential Client	01/13/2025 9:59 AM	
2	CrossMerg	Peter Enzinger	peter@crossmerg.com	415-818-2423	Active	Commercial Client	12/08/2024 8:50 AM	
1	GoMoverz	Nathan Jackson	hello@mygomoverz.com	(707) 208-3515	Active	GM Company	12/08/2024 8:30 AM	
8	My Template Account	My Templates	1@gmail.com		Active		01/12/2025 7:45 AM	

Showing 1 to 8 of 8 entries

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Step 2. Copying the “Project” template to the “Customer” you want.

Click on the “Projects” tab in the “Customers sub menu” to reveal the project called “Template Local Move”

The screenshot displays the GoMoverz web application interface. On the left, a navigation sidebar lists various sections: Dashboard, Customers, Sales, Expenses, Contracts, Projects, Tasks, Leads, Estimate Request, Knowledge Base, Utilities, Reports, and Setup. The 'Projects' section is highlighted with a red box. In the main content area, the 'Projects' tab is selected, showing a list of projects. The first project, 'Template Local Move', is highlighted with a red box and a red arrow pointing to it. The project details include: # 2, Project Name: Template Local Move, Tags: Recurring Customer, Pays On-time, Start Date: 01/12/2025, Deadline: 01/13/2025 9:00 AM, Status: On Hold, Move From Address: 2725 Silverado Drive, Pinole CA, and Move From Date and Time: 01/13/2025 9:00 AM. The interface also shows a search bar, a 'New Project' button, and a status filter (0 Not Started, 0 In Progress, 1 On Hold, 0 Cancelled, 0 Finished).

Next, click on the “Template Local Move” and the project will open.

Next, on the right side of the project screen click on the “More” button to reveal the options for this project. You want to choose “Copy Project” from the dropdown.

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The screenshot displays the GoMoverz web application interface. The top navigation bar includes a search bar, a settings icon, and a notification bell. The main header shows the user's name 'Peter Enzinger' and the current project 'Template Local Move - My Template ...'. A 'More' dropdown menu is open, with 'Copy Project' highlighted in a red box. The main content area is divided into two columns. The left column, titled 'Overview', contains project details such as Project # 2, Customer My Template Account, Billing Type Total Rate, Fixed Rate \$8,788.66, Status On Hold, Start Date 01/12/2025, Move From Address 2725 Silverado Drive, Pinole CA, Move To Address Tennis Courts at Civic Center Park, Concord CA, Square Footage 2,400 to 2,500 sq. ft., and Deposit Required 878.87. The right column, titled 'Template Local Move', shows a progress bar, an 'Expenses' section, and a 'Total Logged Hours' section with a grid for logging hours from 01:00 to 00:00 over a period of 13 days (Monday to Sunday). A red arrow points from the search bar to the 'More' dropdown menu.

A new dialog box will open, DON'T CHANGE ANYTHING HERE except the following:

“Project Name” Enter the name of the project, for your business I would suggest using the Street name like I used for the customer I created for this example: **Bradley Square**

“Customer” Just click on the option and start typing the name of the New Customer you added in steps 1-4 above. A list of customers will start appearing, choose the one you want.

Next, in the **“Start Date”** click to choose your start date for the project.

Next, you can do the same for the **“Deadline”** for the project if you have one.

Then click **“Copy Project”**

This will copy the Project Template to the New Customer account, such as it did for **Sally Field**

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The screenshot displays the GoMoverz web application interface. A central dialog box titled "Copy Project" is open, allowing a user to duplicate a project template. The dialog includes several sections:

- Tasks:** A list of checkboxes for copying various project elements, all of which are checked:
 - Tasks
 - Copy checklist items
 - Copy the same assignees
 - Copy the same followers
 - Milestones
 - Members
- Status:** Radio buttons for selecting the project's status. "Not Started" is selected.
 - Not Started
 - In Progress
 - Testing
 - Awaiting Feedback
 - Complete
- Project Name:** A text input field containing "Bradley Square".
- Customer:** A dropdown menu showing "Sally Field".
- Start Date:** A date picker field set to "01/13/2025".
- Deadline:** An empty date picker field.

At the bottom of the dialog, there are two buttons: "Close" and "Copy Project". Four red arrows are overlaid on the image, pointing to the "Copy Project" button and the input fields for Project Name, Customer, and Start Date.

The background shows the "Template Local Move" overview page with details such as Project # 2, Billing Type Fixed Rate, Status On Hold, Start Date 01/12/2025, Move From Address 2725 Silverado Drive, Pinole CA, Move To Address Tennis Courts at Civic Center Park, Concord CA, and Square Footage 2,400 to 2,500 sq. ft.

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Step 3. Copying the “Proposal” template to the “Customer” you want.

Starting in the Main Menu click on “Customers” this will show you all your customers. Next, look for the customer labeled “My Template Account” and choose it so it will open that account profile, alternatively you can “Search” for this name in the search box to the right of the screen.

Next, click on the “Proposals” tab in the submenu and choose the “PRO-000001”

The screenshot shows the GoMoverz software interface. The top navigation bar includes the GoMoverz logo, a search bar, and user settings. The left sidebar contains a menu with categories like Dashboard, Customers, Sales, Expenses, Contracts, Projects, Tasks, Leads, Estimate Request, Knowledge Base, Utilities, Reports, and Setup. The main content area is titled '#8 My Template Account' and 'Proposals'. A table lists the following proposal:

Proposal #	Subject	Total	Date	Open Till	Tags	Date Created	Status	Deposit Required	Moved from ad
PRO-000001	Demo Local Move	\$7,763.65	01/11/2025	01/13/2025	Recurring Customer	01/11/2025 11:00 AM	Draft	878.87	Tennis Courts a Center Park

A red arrow points to the 'PRO-000001' ID in the first column of the table. The interface also shows a 'New Proposal' button, a 'Sync Data' button, and a search bar within the proposals section.

A new dialog screen will open.

Next, on the right side of the proposal screen click on the “More” button to reveal the options for this proposal. You want to choose “Copy” from the dropdown.

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The screenshot displays the GoMoverz web application interface. On the left is a sidebar with navigation options: Dashboard, Customers, Sales, Expenses, Contracts, Projects, Tasks, Leads, Estimate Request, Knowledge Base, Utilities, Reports, and Setup. The main area shows a 'New Proposal' form. At the top, there's a search bar and a '+ New Proposal' button. Below that is a table with columns: Proposal #, Subject, To, Total, Status, Deposit Required, and Moved. The table contains one entry: PRO-000001, Demo Local Move, My Templates, \$7,763.65, Draft, 878.87, and Tennis Center. Below the table, it says 'Showing 1 to 1 of 1 entries' with 'Previous' and 'Next' buttons. To the right of the table is a detailed view of the selected proposal. It shows the proposal title 'PRO-000001 Demo Local Move' and the company information: GoMoverz, 360 State Street, Ste A, Fairfield CA 94533. A 'More' dropdown menu is open, showing options: View Proposal, Attach File, Copy, Mark as Sent, Mark as Open, Mark as Revised, Mark as Declined, Mark as Accepted, and Delete. Red arrows point to the 'More' button and the 'Copy' option.

A new dialog box will open, HERE IS WHERE YOU MAKE MOST OF YOUR CHANGES. *Please note, that all the customers information from their Profile auto populated to the fields on the right side of the screen, so change only if you need to.

“Subject” This is one of the items that the customer WILL SEE when you send this to them. Enter the name of the subject, for your business I would suggest using the Street name like I used for the project I created for this example: **Bradley Square Move**

“Related” Leave this set to **Customer**, there are other ways to manage this but for now leave it like this.

“Customer” start typing the customer’s name. For this example, I used the one I created **Sally Field**.

“Project” start typing the customer’s project name you created earlier. For this example, I used the one I created **Bradley Sqaure**

Next, in the **“Date”** click to choose your start date for the proposal.

Next, you can do the same for the **“Open Till”** for the proposal if you have one. Usually, this is a few days only.

Next, you can choose a **“Discount Type”** if you want

Next, is the **“Deposit Required”** Field, enter your required amount. In this example it’s \$878.87. We will return to this later

Next, is the **“Moved from address:”** where you will put the address you are moving the customer from

Next, is the **“On Date and Time:”** where you will choose a date & time you are moving the customer from address

Next, is the **“Moved to address:”** where you will put the address you are moving the customer to the new address

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Next, is the **“On Date and Time:”** where you will choose a date & time you are moving the customer to the new address

Next, adjust your items as need

Next, the **“Discount”** field can be either a fixed amount or percentile and either before tax or after tax. Just enter which type and amount you want here

Next, this is the required state and local taxes applied to your products. *Important, when using a product in your item fields make sure to change the **“Tax”** from the dropdown for that specific item

Next, is the **“Adjustment field”**. Here you can make manual adjusts to the final totaled items. *Important, if you want to decrease the item total you MUST enter as such **-15.00** not 15.00.

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GoMoverz We do moving right

Search...

Settings

PRO-000003 Draft

*** Subject**
Bradly Square Move

*** Related**
Customer

*** Customer**
Sally Field

Project
#3 - Bradley Square - Sally Field

*** Date**
01/13/2025

Open Till
01/16/2025

*** Currency**
USD \$

Discount Type
After Tax

*** Deposit Required**
878.87

*** Moved from address:**
145 Bradley Square Apt 32, Fairfield

*** Move to address:**
1826 Pine Street, Marin

*** On Date and Time:**
01/15/202

*** On Date and Time:**
01/15/202

Tags
Recurring Customer

Status
Draft

Assigned
Peter Enzinger

*** To**
Sally Field

Address
145 Bradley Square
Apt 32

City
Fairfield

State
CA

Country
United States US

Zip Code
94876

*** Email**
sallyfield@gmail.com

Phone
415-457-8754

Show quantity as: Qty Hours Qty/Hours

Item	Description	Qty/Hours	Rate	Tax	Amount
Description	Long description	1 Unit	Rate	No Tax	
5 bedroom house full packing service	This package allows for 2 King, 3 Queen/full, and up 4 twin size beds, 2 sofas or section, 3 living	1.00 Unit	3865.00	No Tax	3,865.00
4 movers 8 hours	Includes: truck, shrink wrap and furniture blankets disassembly and reassembly Not included gas and	1.00 Unit	3200.00	No Tax	3,200.00
Storage Fee	per day storage	3.00 1	259.00	No Tax	777.00
blanks	client wants to purchase extra blankets	1.00 Unit	98.95	9.75%	98.95
Benicia-Martinez Toll	\$18.00 to \$38.00	1.00 Unit	18.00	No Tax	18.00
* Required Deposit	The Amount shown to the right is the REQUIRED DEPOSIT FOR BOOKING & SECURING YOUR	1.00 Unit	878.87	No Tax	878.87

Save & Send Save

Sub Total :	\$8,837.82
Discount	12.25 % -\$1,083.81
Contra Costa City Pinole(9.75%)	\$9.65
Adjustment	0.00 \$0.00
Total	\$7,763.65

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Here is the final view of your Proposal, it's the electronic version that the customer will receive and can e-sign

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PRO-000003
Bradly Square Move

Download Decline **Accept**

Summary Discussion

#	Item	Qty/Hours	Rate	Tax	Amount
1	5 bedroom house full packing service This package allows for 2 King, 3 Queen/full, and up 4 twin size beds, 2 sofas or section, 3 living room chairs, coffee & end tables, kitchen table & chairs, floor & table lamps, and all your boxed goods.	1	3,865.00	0%	3,865.00
2	4 movers 8 hours Includes: truck, shrink wrap and furniture blankets disassembly and reassembly Not included gas and miles	1	3,200.00	0%	3,200.00
3	Storage Fee per day storage	31	259.00	0%	777.00
4	blanks client wants to purchase extra blankets	1	98.95	Contra Costa City Pinole 9.75%	98.95
5	Benicia-Martinez Toll \$18.00 to \$38.00	1	18.00	0%	18.00
6	* Required Deposit The Amount shown to the right is the REQUIRED DEPOSIT FOR BOOKING & SECURING YOUR APPOINTMENT. When paying you can simply change the full amount in the payment field below to the REQUIRED DEPOSIT amount. Calculated at 10% of your total quoted moving or hauling fee.	1	878.87	0%	878.87
Sub Total					\$8,837.82
Discount (12.25%)					-\$1,083.81
Contra Costa City Pinole (9.75%)					\$9.65
Total					\$7,763.65

GoMoverz
360 State Street, Ste A
Fairfield CA
94533

Proposal Information

Sally Field
145 Bradley Square
Apt 32
Fairfield CA
US 94876
415-457-8754
sallyfield@gmail.com

Total \$7,763.65

Status: Draft
Date: 01/13/2025
Open Till: 01/16/2025
Project: Bradley Square

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Now, this proposal is attached to the Project you created in steps 5-6 above. From here on out these two things will be married together in the system.

The screenshot shows the GoMoverz dashboard for a project named "Bradley Square - Sally Field". The user is Peter Enzinger. The dashboard includes a sidebar with navigation options like Dashboard, Customers, Sales, Expenses, Contracts, Projects, Tasks, Leads, Estimate Request, Knowledge Base, Utilities, Reports, and Setup. The main content area shows a table of proposals with columns for Proposal #, Subject, To, Total, Date, Open Till, Tags, Date Created, Status, Deposit Required, Moved from address, On Date and Time, Move to address, and On Date and Time. A red arrow points to the first proposal entry.

Proposal #	Subject	To	Total	Date	Open Till	Tags	Date Created	Status	Deposit Required	Moved from address:	On Date and Time:	Move to address:	On Date and Time:
PRO-000003	Bradley Square Move	Sally Field	\$7,763.65	01/13/2025	01/16/2025	Recurring Customer	01/13/2025 11:16 AM	Draft	\$878.87	145 Bradley Square Apt 32, Fairfield	01/15/2025 8:00 AM	1826 Pine Street, Marin	01/15/2025

The screenshot shows the GoMoverz dashboard for the "Bradley Square - Sally Field" project. The user is Peter Enzinger. The dashboard includes a sidebar with navigation options like Dashboard, Customers, Sales, Expenses, Contracts, Projects, Tasks, Leads, Estimate Request, Knowledge Base, Utilities, Reports, and Setup. The main content area shows the project details, including Project #, Customer, Billing Type, Fixed Rate, Status, Date Created, Start Date, Total Logged Hours, Move From Address, Move From Date and Time, Move To Address, Move To Date and Time, Square Footage, Deposit Required, Tags, and Description. A red arrow points to the "Sales" dropdown menu in the top navigation bar.

Overview

Project #	3	Customer	Sally Field
Billing Type	Fixed Rate	Total Rate	\$8,788.66
Status	In Progress	Date Created	01/13/2025
Start Date	01/13/2025	Total Logged Hours	00:00
Move From Address:	2725 Silverado Drive, Pinole CA	Move From Date and Time:	01/13/2025 9:00 AM
Move To Address:	Tennis Courts at Civic Center Park, Concord CA	Move To Date and Time:	01/17/2025 12:00 PM
Square Footage	2,400 to 2,500 sq. ft.	Deposit Required	878.87

Tags: **Recurring Customer** **Pays On-time**

Description

- We will provide full-service packing at the Move From Address
- We will move and provide storage for all contents for 3 days/nights
- We will move all contents to the Move To Address
- We will not unpack any boxes as the client will do this

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Step 4. Copying the “Contract” template to the “Customer” you want.

Starting in the Main Menu click on “Customers” this will show you all your customers. Next, look for the customer labeled “My Template Account” and choose it so it will open that account profile, alternatively you can “Search” for this name in the search box to the right of the screen.

Next, click on the “Contracts” tab in the submenu and click/open the “Local Move - Template”

The screenshot shows the GoMoverz web application interface. On the left is a navigation sidebar with various menu items. The main content area displays the account profile for "#8 My Template Account" and a list of contracts. A red box highlights the "Contracts" menu item in the sidebar and the "#8 My Template Account" dropdown in the top navigation. A red arrow points to the "Local Move - Template" contract entry in the table.

#	Subject	Contract Type	Contract Value	Start Date	End Date	Project	Signature	moved FROM ADDRESS	or
5	Local Move - Template	Adhesion Contracts	\$8,788.66	01/11/2025	01/14/2025	Template Local Move	Not Signed	somewhere	01 10

A new dialog box will open, don't change anything here. Just do the next step below.

Next, on the right side of the “**Contract Information**” screen click on the “**More**” button to reveal the options for this contract. You want to choose “**Copy**” from the dropdown.

A new dialog box will open, it will look identical to the previous dialog box. Here is where you assign the contract to your Customer you created and make changes as follows:

“**Customer**” Just click on the option and start typing the name of the Customer you want. A list of customers will start appearing, choose the one you want. In this example we chose **Sally Field**. *Please note, that all the customers information from their Profile will auto populate to the fields on the Contract that will be sent via email.

“**Project**” Just click on the option and start typing the name of the Project you added above. A list of projects will start appearing, choose the one you want. In this example we chose **#3 – Bradley Square - Sally Field**.

“**Subject**” here you can change the text from “Local Move – Template” to “Local Move”

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“**Contract Value**” enter the dollar amount from your Total in the Proposal you made, see below screenshot. In this example I used **7,763.65**. This field is not mandatory but it is very useful for you to keep track of your business dealing and success. I firmly suggest you use this feature.

The screenshot shows the GoMoverz web application interface. The user is logged in as Peter Enzinger. The main navigation menu includes Dashboard, Customers, Sales, Expenses, Contracts, Projects, Tasks, Leads, Estimate Request, Knowledge Base, Utilities, and Reports. The current view is the 'Sales' section, showing a list of contracts. The contract entry form is visible, with the following fields highlighted:

Proposal #	Subject	Customer	Total	Date	Open Till	Tags	Date Created	Status	Deposit Required	Moved from address:	On Date and Time:	Move to address:	On Date and Time:
PRC-000003	Brady Square Move	Sally Field	\$7,763.65	01/13/2025	01/16/2025	Recurring Customer	01/13/2025 11:16 AM	Draft	\$878.87	145 Bradley Square Apt 32, Fairfield	01/15/2025 8:00 AM	1826 Pine Street, Marin	01/15/2025 12:00 PM

“**Contract type**” leave the default value

“**Start Date**” here is where you enter the “**Contract Date**” **NOT the move date** as that will be in the following steps. I used January 11, 2025

“**End Date**” here is where you enter the “**Contract Date**” **NOT the move date** as that will be in the following steps. I used January 13, 2025. I gave a customer a couple days to decide on accepting the contract. But you can always just use the same day for both the Start & End Dates.

“**Description**” **DO NOT TOUCH THIS**. If you want to change some of the wording, we can do that together.

“**Date**” this is where you choose when to start the process of your work for the customer. For this example, I chose the same day as the actual Move Day. But you can use an earlier date, say if you want a few days to prepare things on your end before the Actual Move date you have in the contract.

“**moved FROM ADDRESS**” here you enter the Present Address the customer is located at. In this example I used Sally Field’s address: **145 Bradley Square Apt 32, Fairfield CA 94876**

“**on DATE**” here you choose the Date & Time of when the actual move is. In this example I used **01/14/2025 8:00 AM**

“**moved TO ADDRESS**” here you enter the New Address the customer is moving to. In this example I used the new address I entered on the Proposal: **1826 Pine Street, Marin**

“**on DATE**” here you choose the Date & Time of when the actual move is. In this example I used **01/17/2025 12:00 PM**

Next, click Save and the system will generate and marry this contract to the Customer & Project.

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Local Move

View Contract



More

Contract Information

Content

Attachments

Comments

Renewal History

Tasks

Notes

Templates 2



Trash Hide from customer

* Customer

Sally Field



Project

Bradley Square



* Subject

Local Move

Contract Value

7763.65

\$

Contract type

Adhesion Contracts



* Start Date

01/11/2025



End Date

01/13/2025



Description

Beginning on {contracts_date}, {companyname} will provide to {contact_firstname} {contact_lastname} the moving services described in the attached Exhibit (collectively, the "Services").

The property contents will be moved from {contracts_moved_from_address} on {contracts_on_date} to {contracts_moved_to_address} on {contracts_on_date_2}.

* Date

01/14/2025



* moved FROM ADDRESS

145 Bradley Square Apt 32, Fairfield CA 94876

* on DATE

01/14/2025 8:00 AM



* moved TO ADDRESS

1826 Pine Street, Marin CA 94901

* on DATE

01/17/2025 12:00 PM



Save