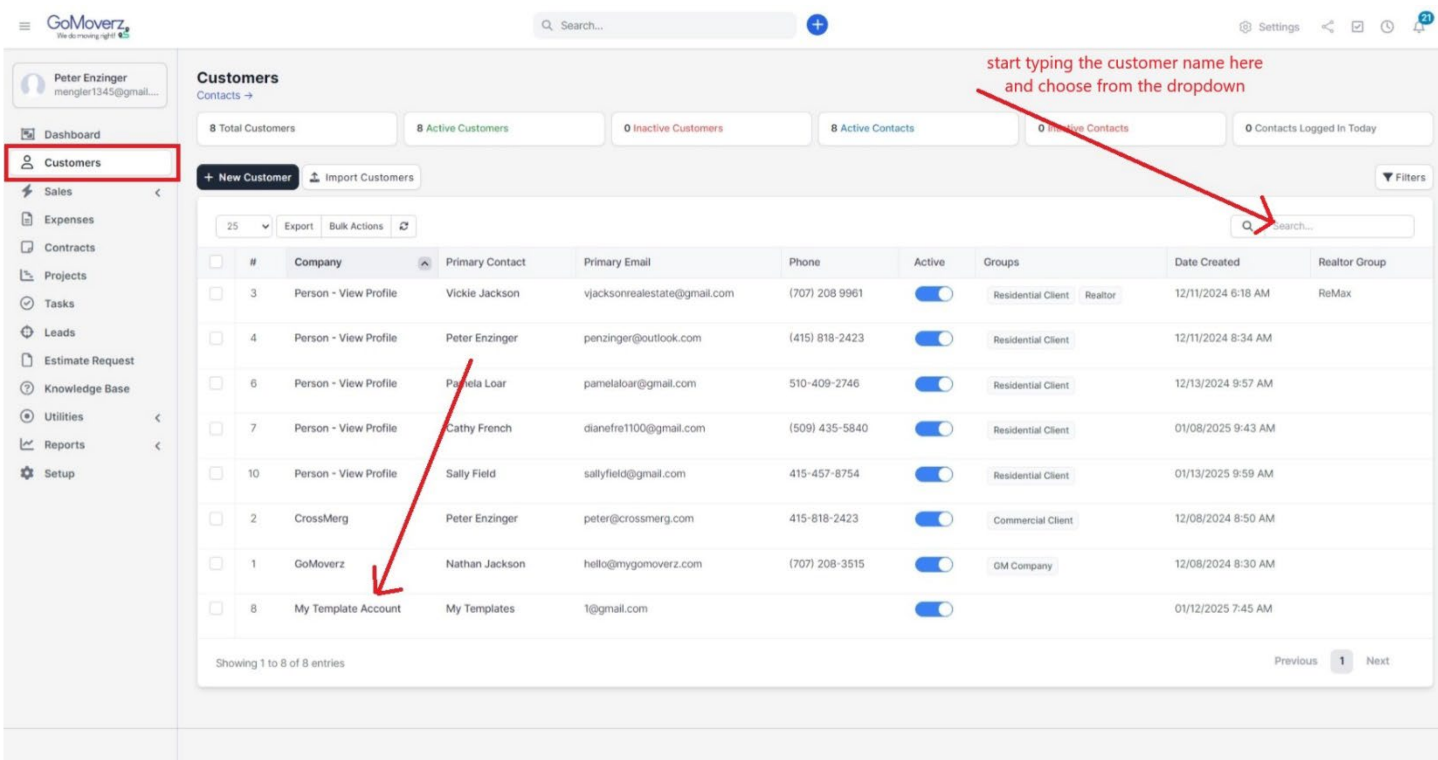
How to copy a “Project Template” to a “Customer” account in the CRM

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.



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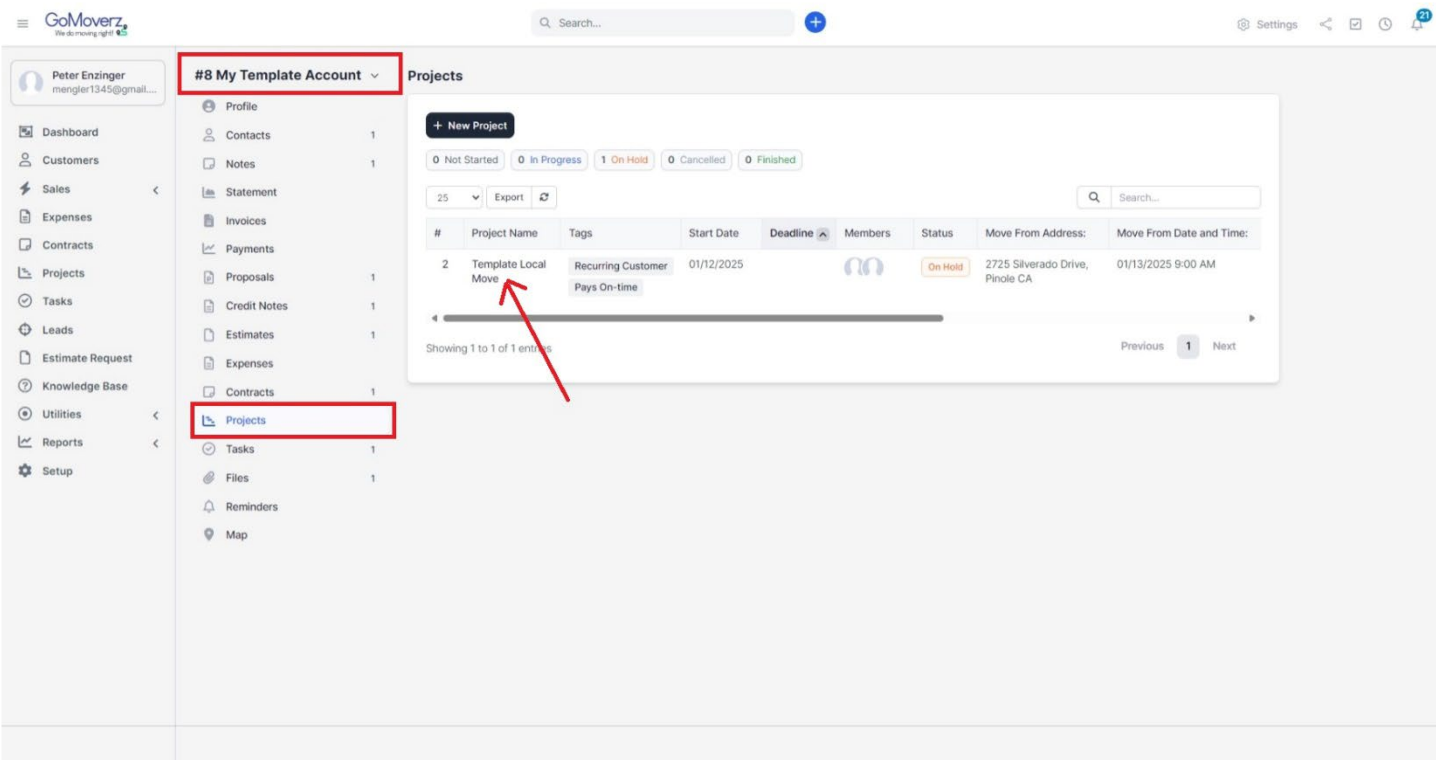
Step 2. Copying the “Project” template to the “Customer” you want.

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



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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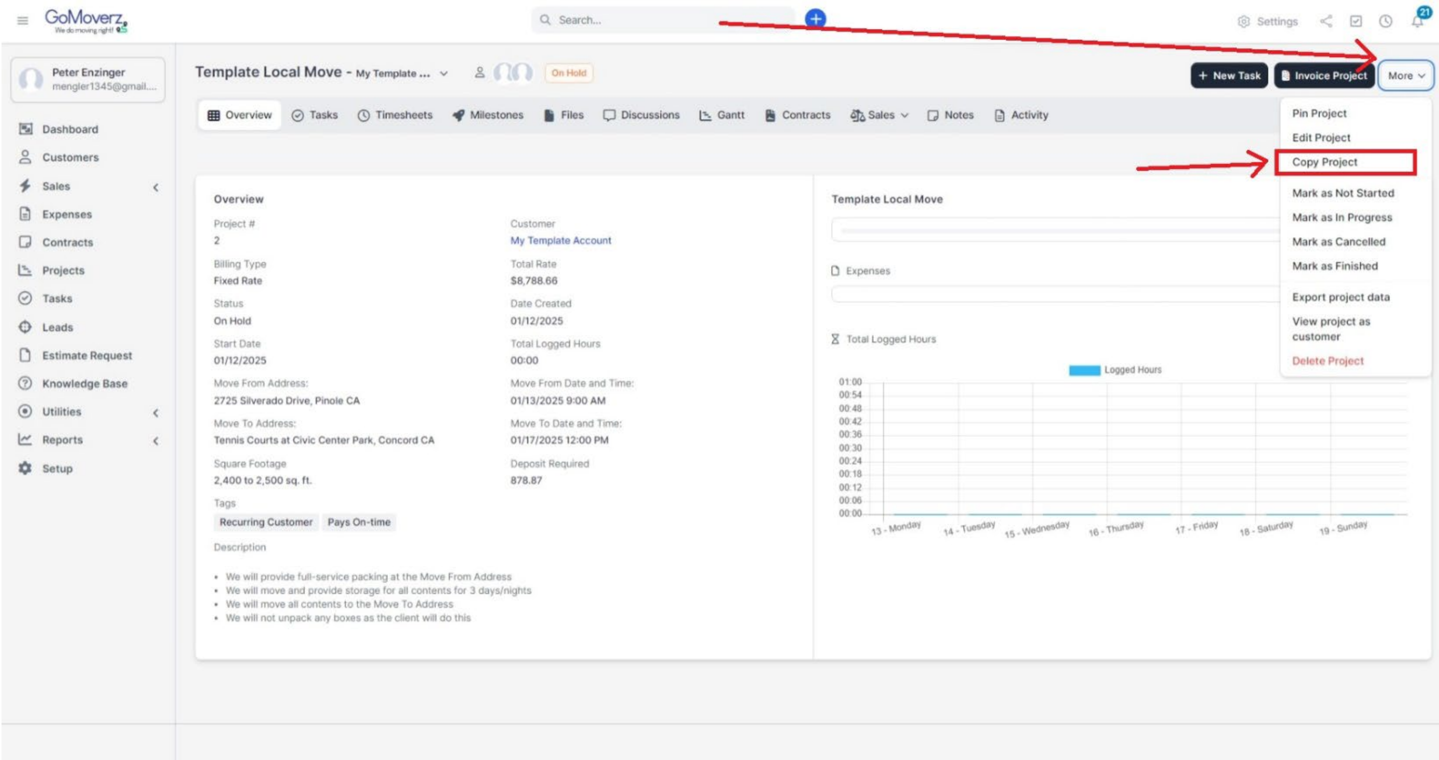

A new dialog box will open, DON'T CHANGE ANYTHING HERE except the following:

"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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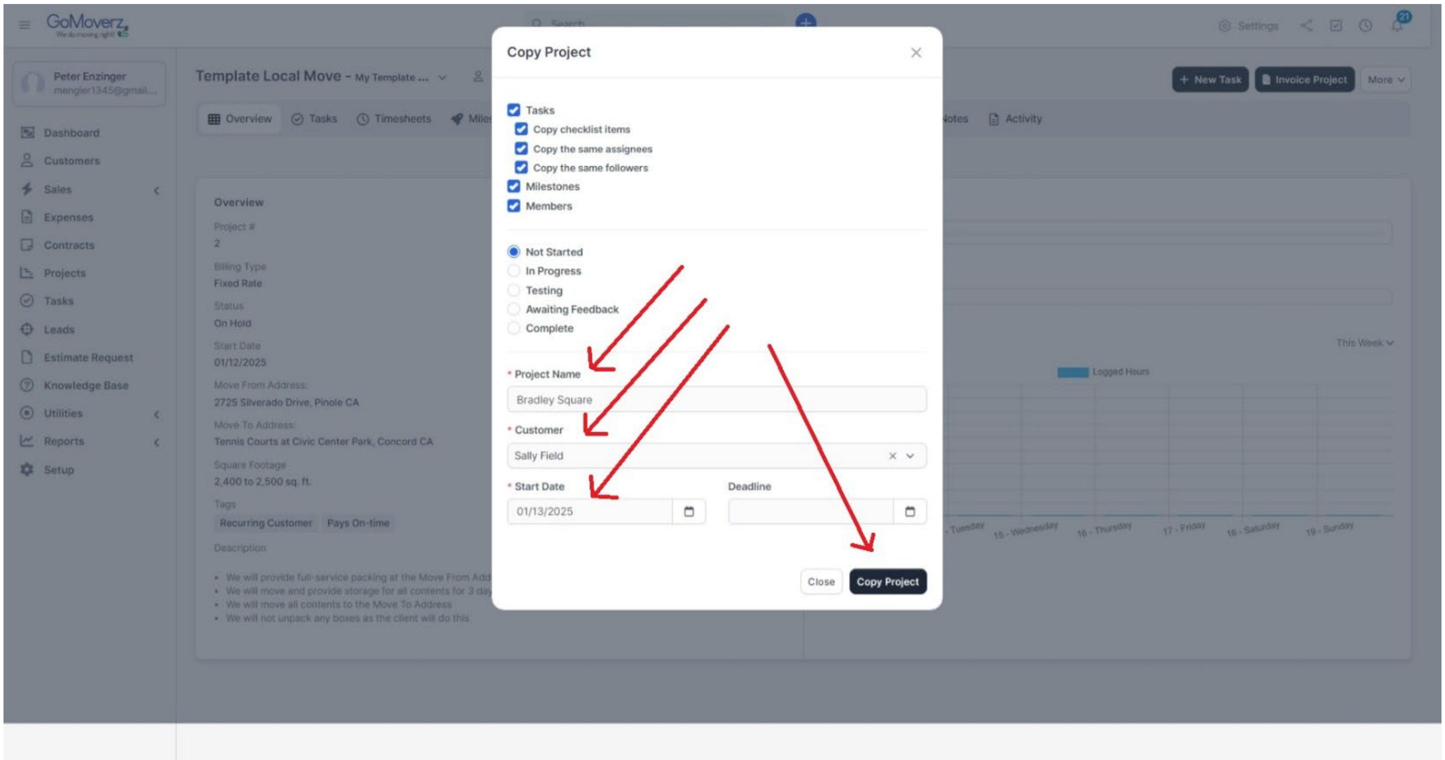
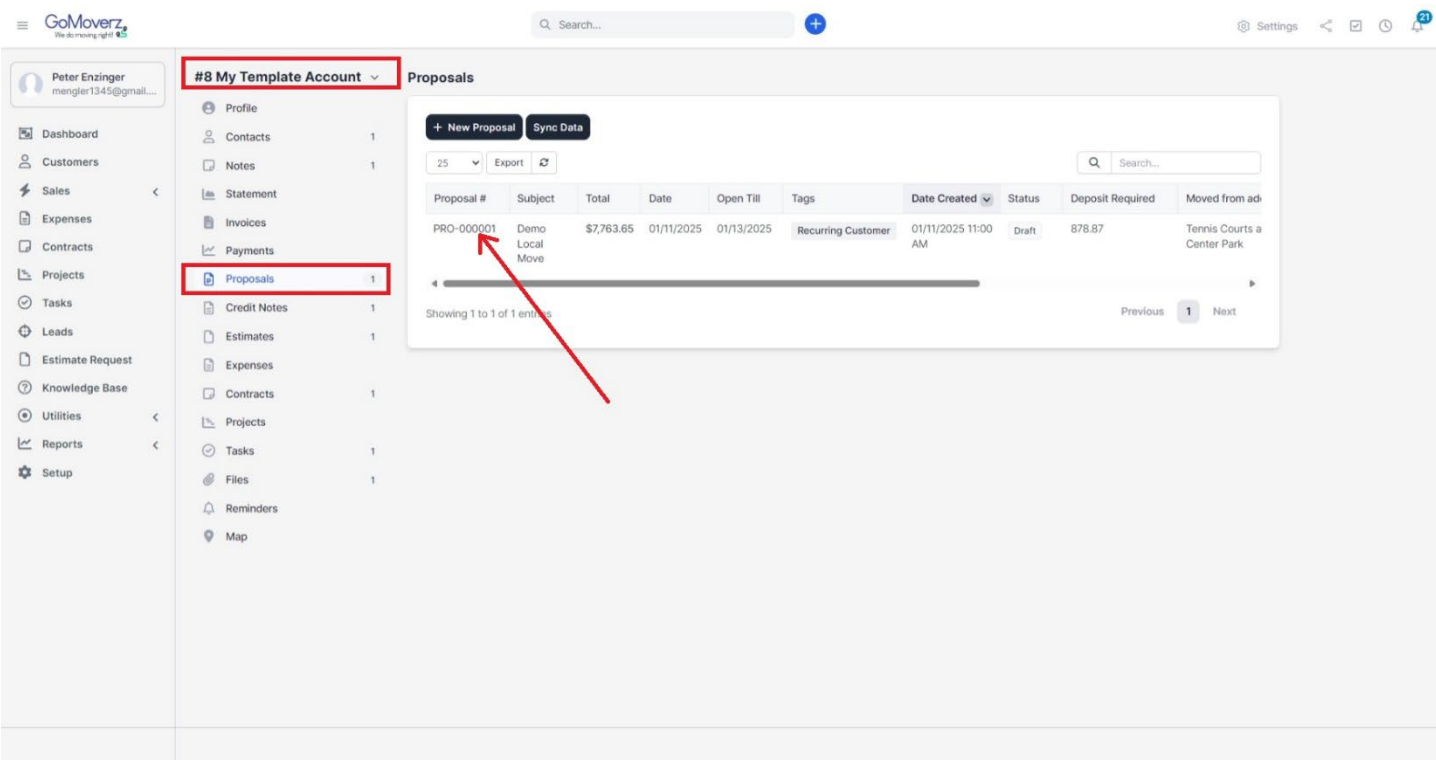


Step 3. Copying the “Proposal” template to the “Customer” you want.

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”



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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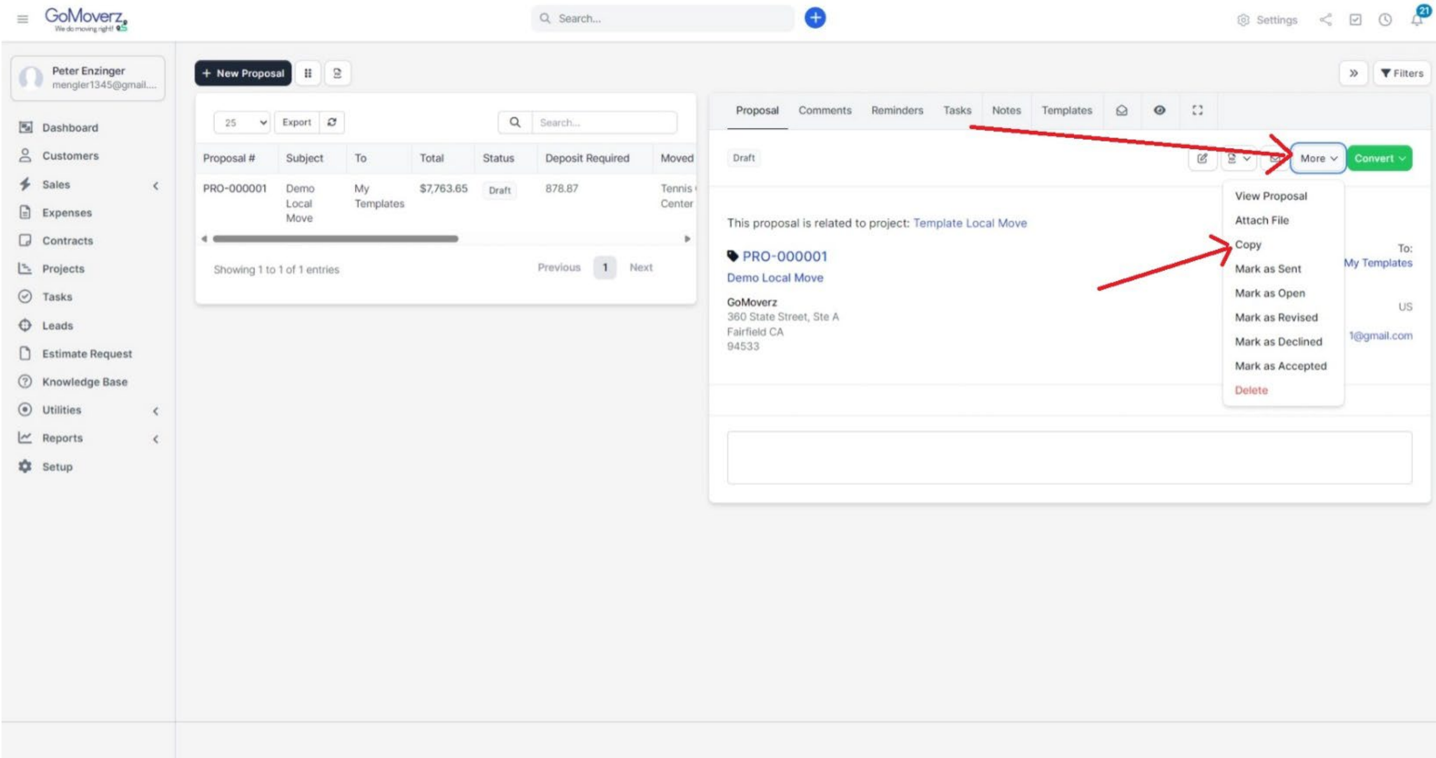

A new dialog box will open, HERE IS WHERE YOU MAKE MOST OF YOUR CHANGES. *Please note, that all the customers information from their Profile auto populated to the fields on the right side of the screen, so change only if you need to.

"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

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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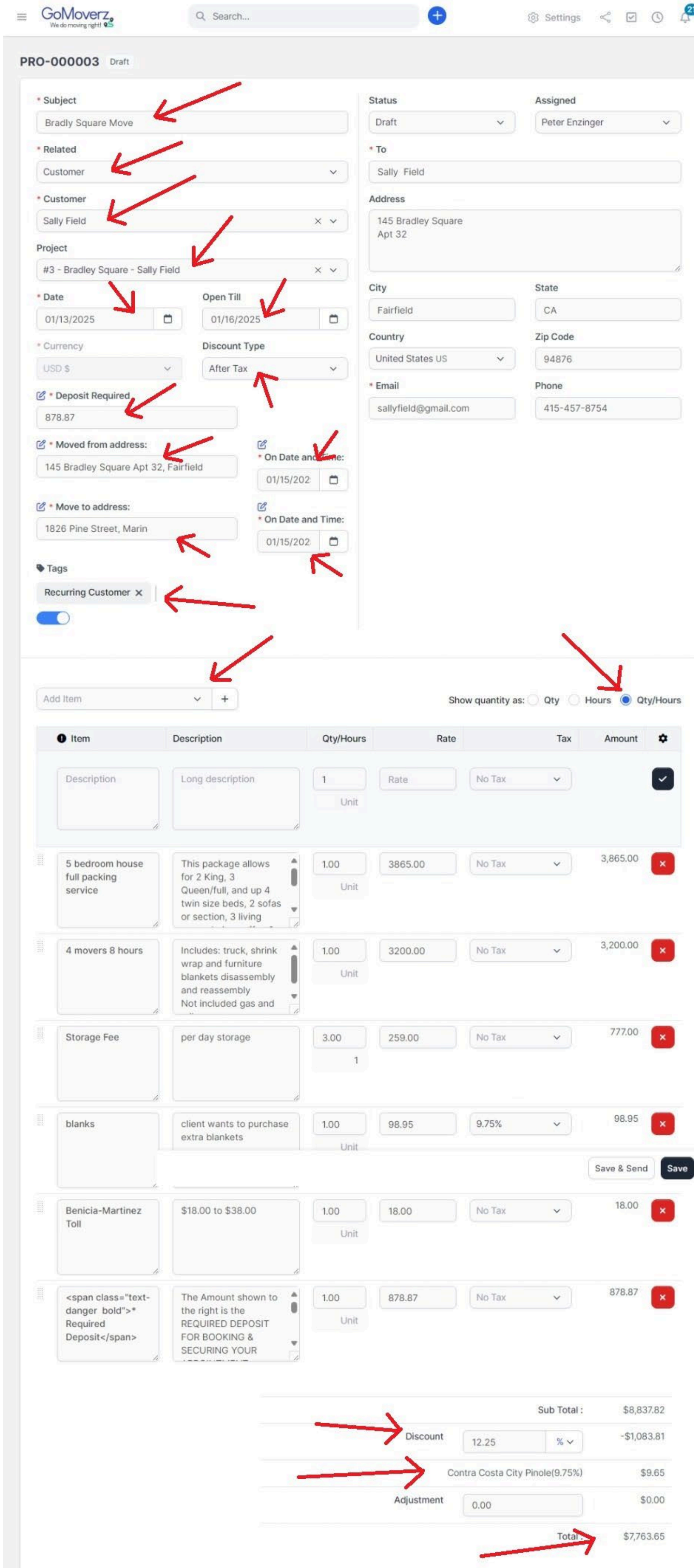

Here is the final view of your Proposal, it's the electronic version that the customer will receive and can e-sign

GoMoverz
We do moving right!

PRO-000003
Bradly Square Move

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#	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	3 1	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

Summary | Discussion

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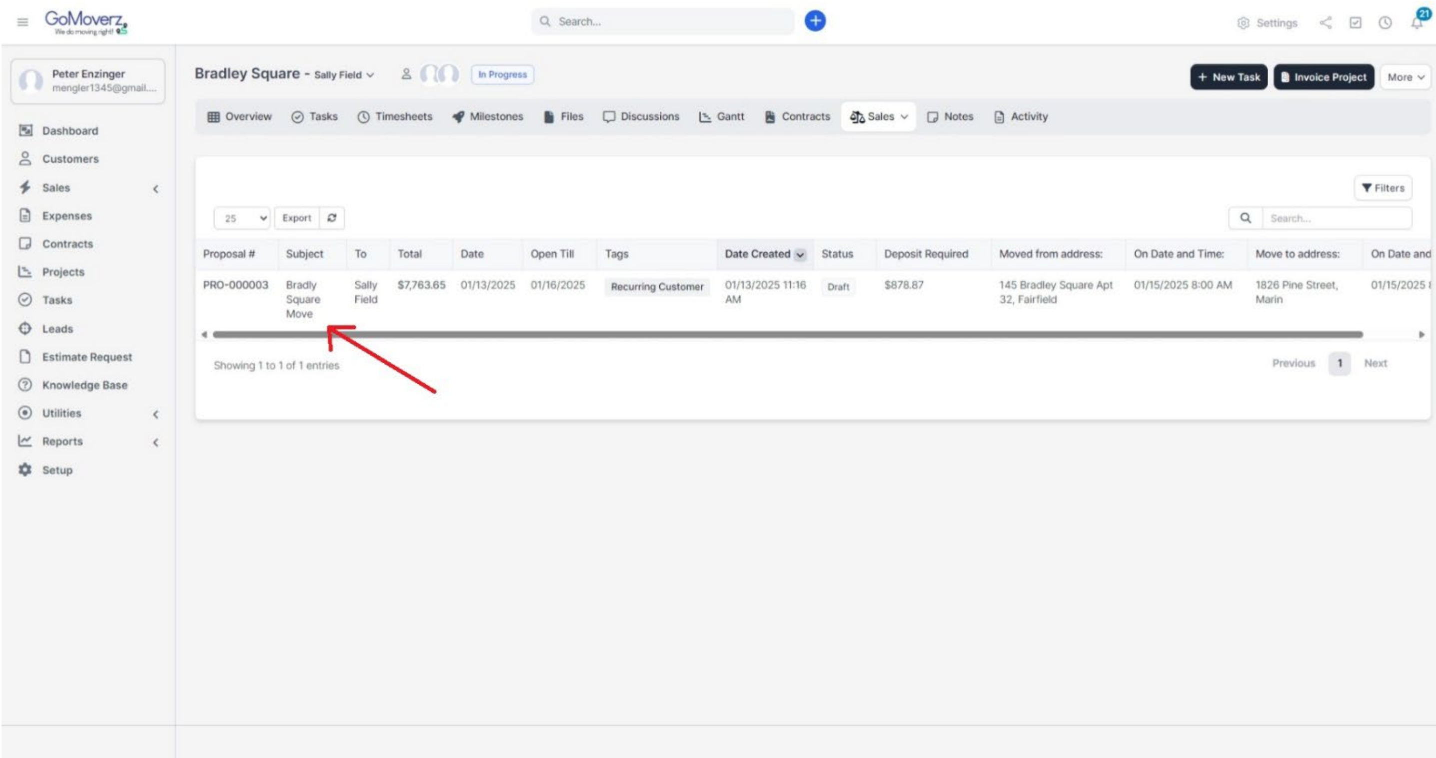
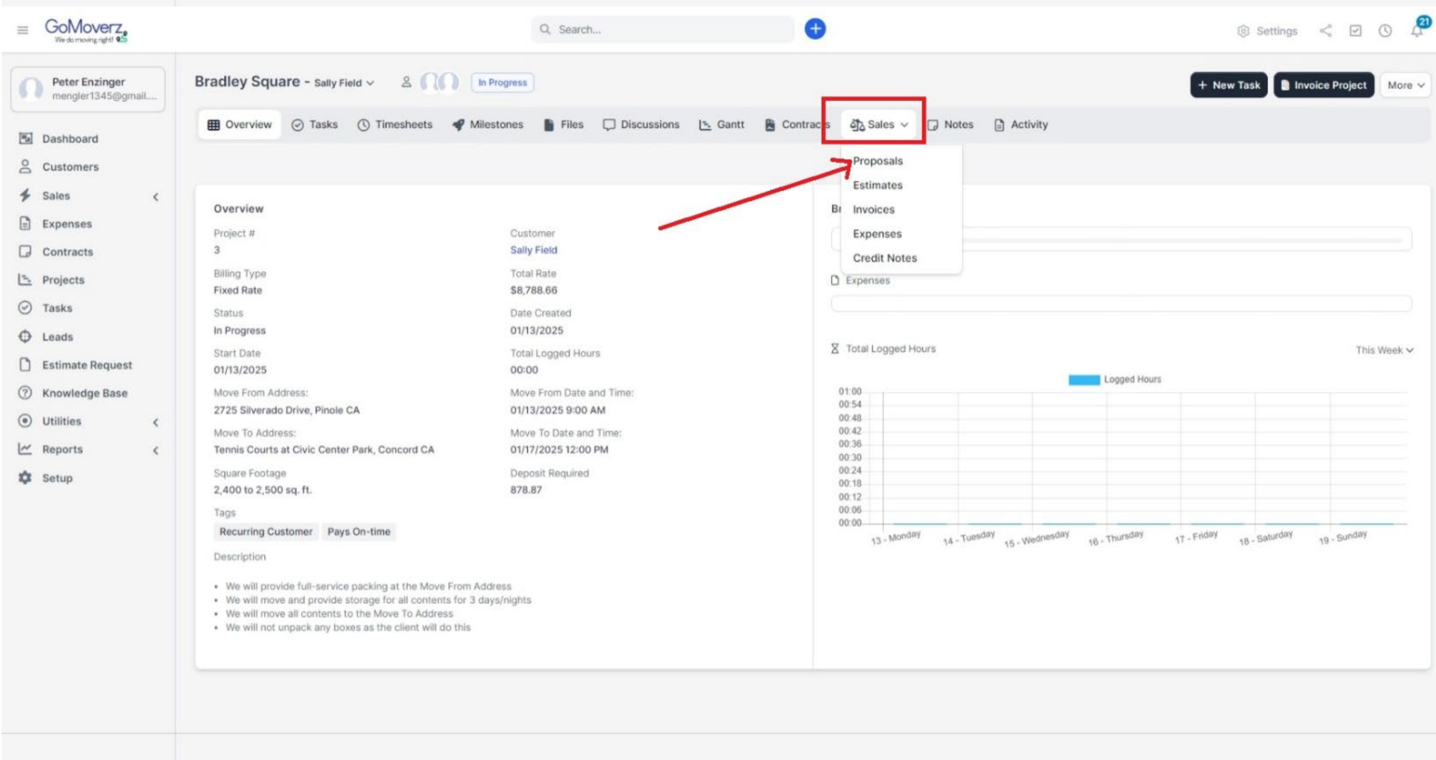
Now, this proposal is attached to the Project you created in steps 5-6 above. From here on out these two things will be married together in the system.

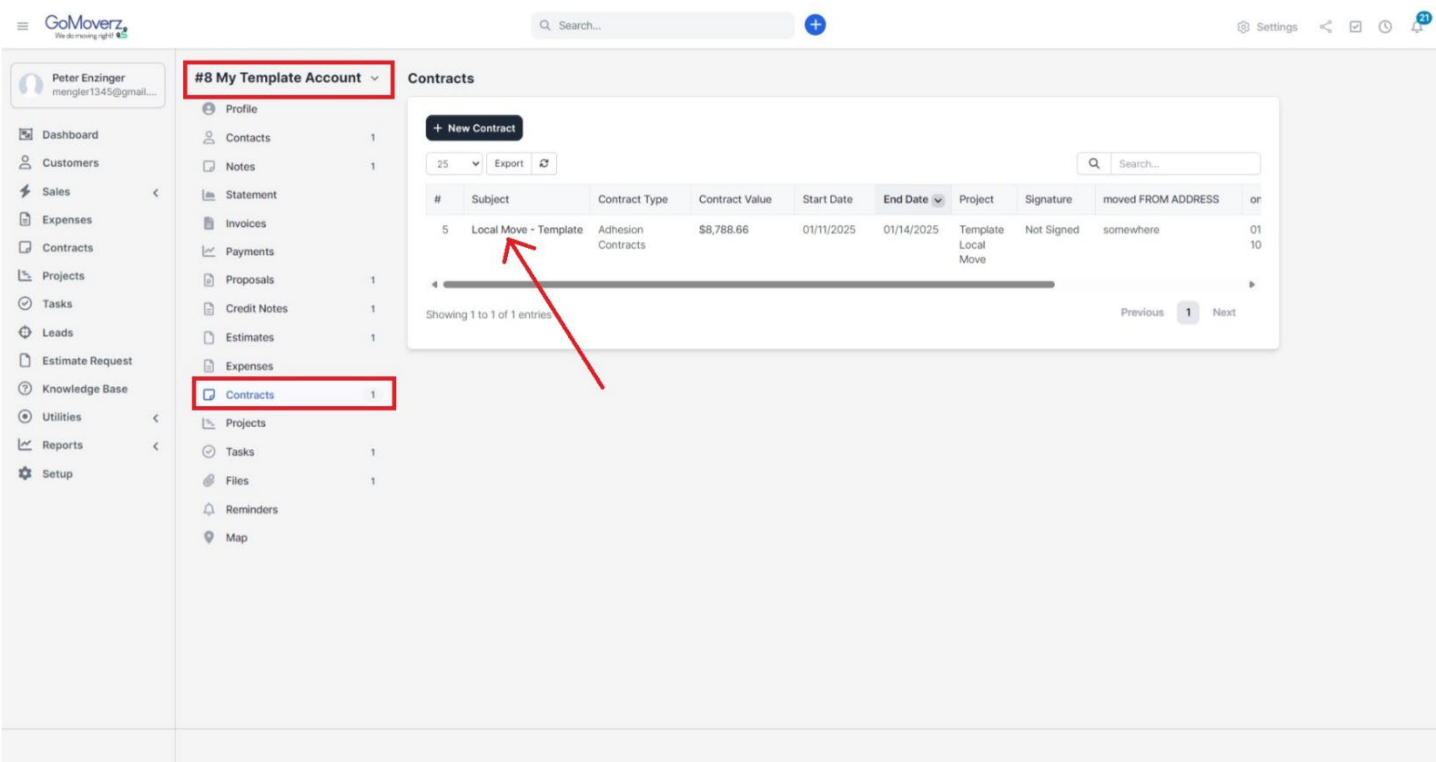




Step 4. Copying the “Contract” template to the “Customer” you want.

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”



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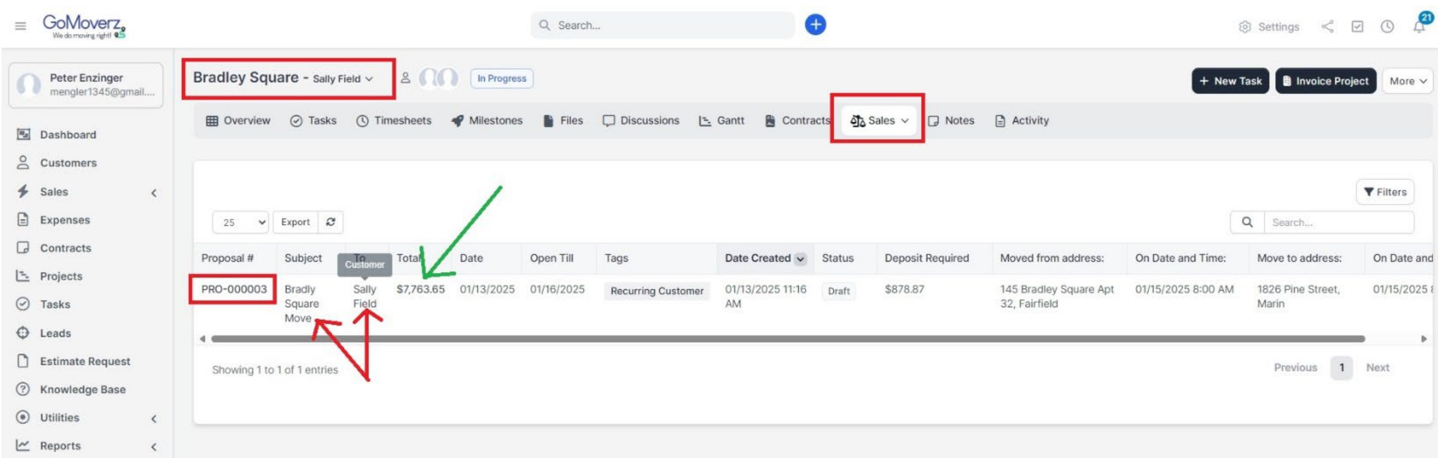
"Contract Value" enter the dollar amount from your Total in the Proposal you made, see below screenshot. In this example I used 7,763.65. This field is not mandatory but it is very useful for you to keep track of your business dealing and success. I firmly suggest you use this feature.



"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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