

Template Settings: Proposal Templates

Estimates are prepared using a default template that has been prepared and pre-loaded into the system. This default template, however, is just one of the many templates that can be used in creating estimates and proposals. Prepare multiple **Estimate and Proposal Templates** and use the one best suited for your client's needs.

IndusTrack's templates are easy to build and maintain. Brand your proposal templates with your company's logo, and make them functional with multiple customizations to choose from.

To create and manage Proposal and Estimate Templates, go to **Settings > Templates > Proposal Templates**.

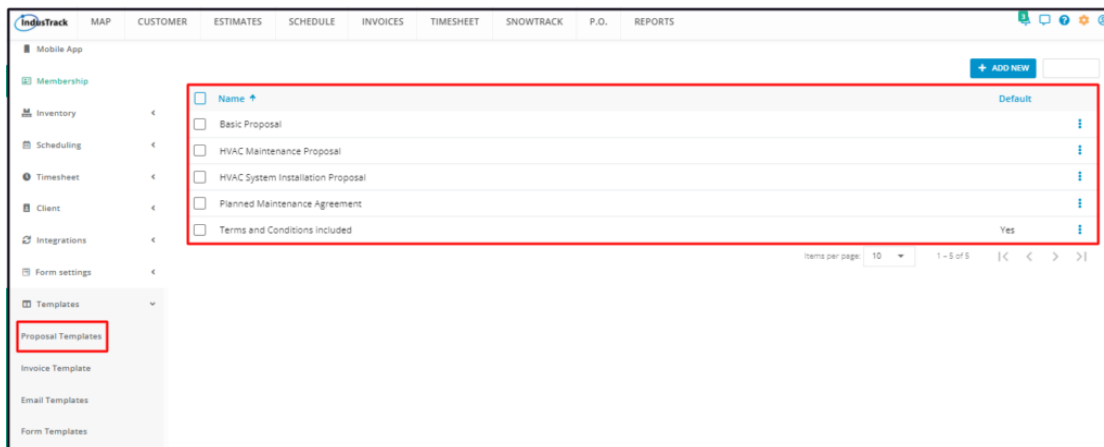
Proposal Template Page

The page defaults to the **list of Proposal Templates** that have already been created, presented in table format. This is also the page where these templates are created, updated and deleted.

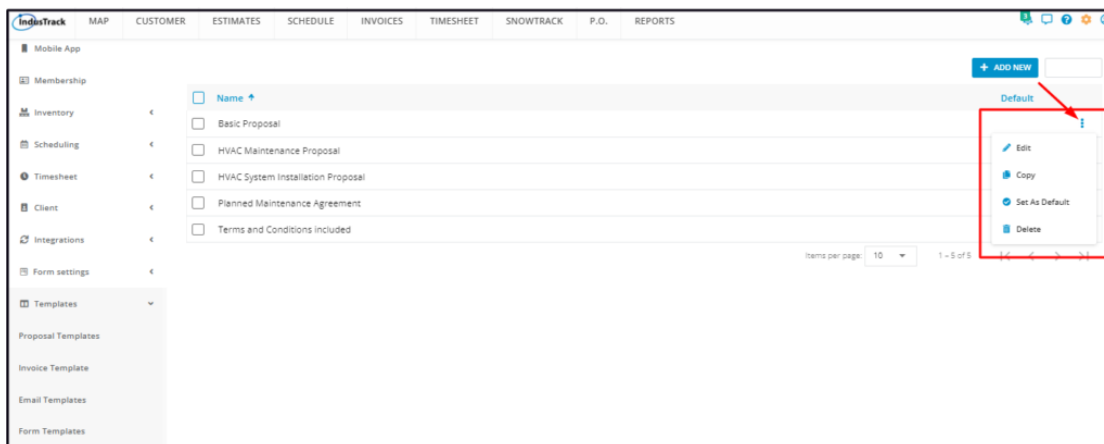
Proposal Template List

The table has 2 columns:

- Name – Refers to the name or title of the proposal template.
- Default – A “Yes” under this column means that the Proposal Template is the default template displayed when a new estimate is to be created.

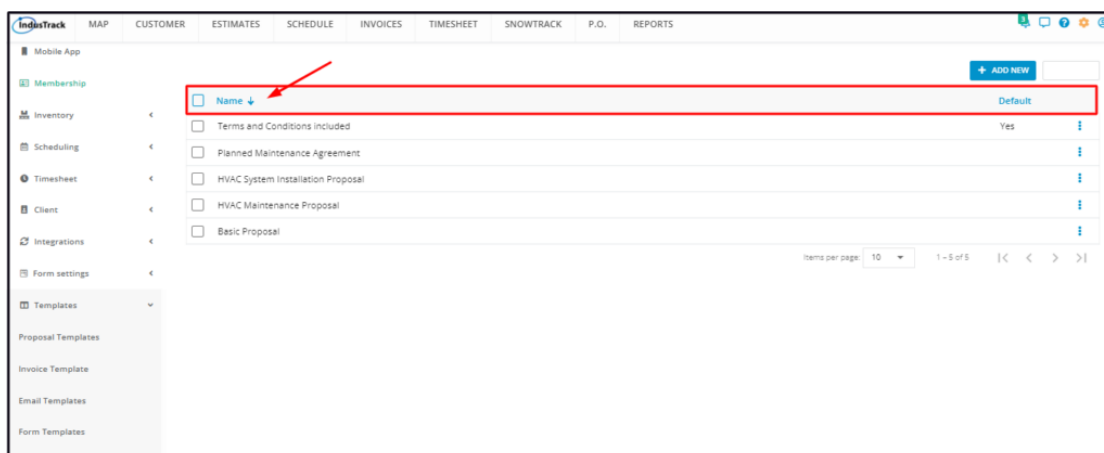


- 3-dot Menu – This menu gives the different options that can be done with a proposal template.
 - Edit
 - Copy
 - Delete
 - Set as the default proposal template



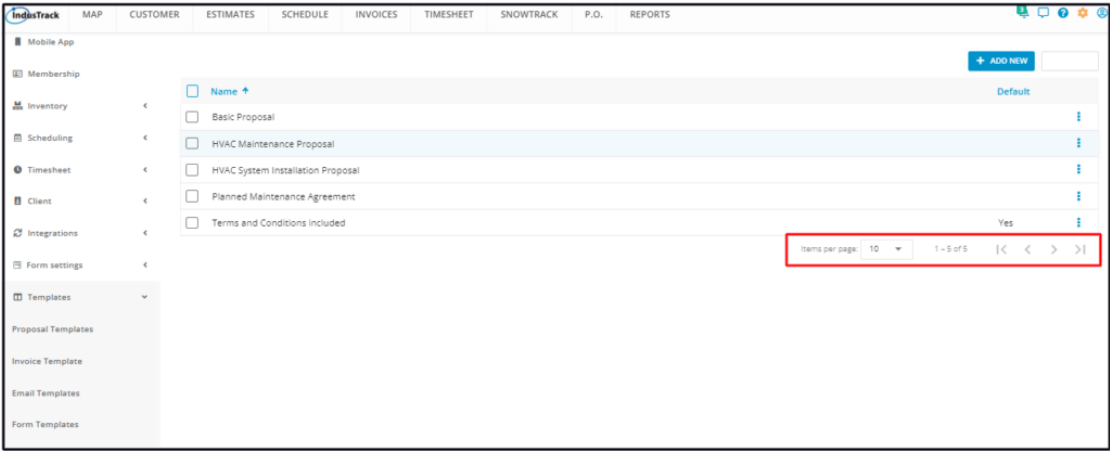
Sort the Task Templates List

Click on the Name header to alphabetically sort the list.



List Per Page

Select the number of proposal templates to be displayed per page. Options to choose from are 10, 25, 50, and 100. Use the Previous and Next buttons to move from one page to another (if there is more than one page).



Add New and Delete Buttons

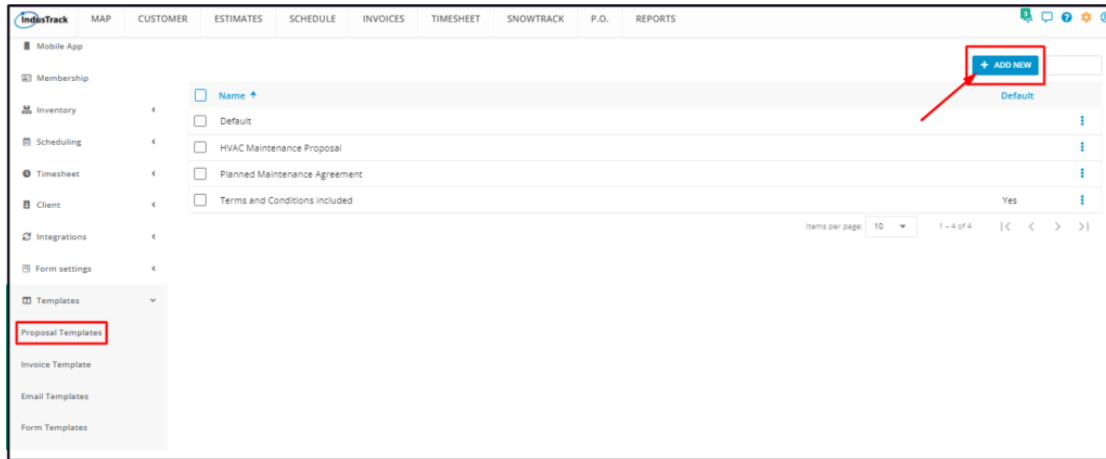
Use these buttons to create or delete a proposal template.

Template Settings: Create & Manage Proposal Templates

There are 2 ways how a Proposal Template is prepared – start from scratch and duplicate an existing one.

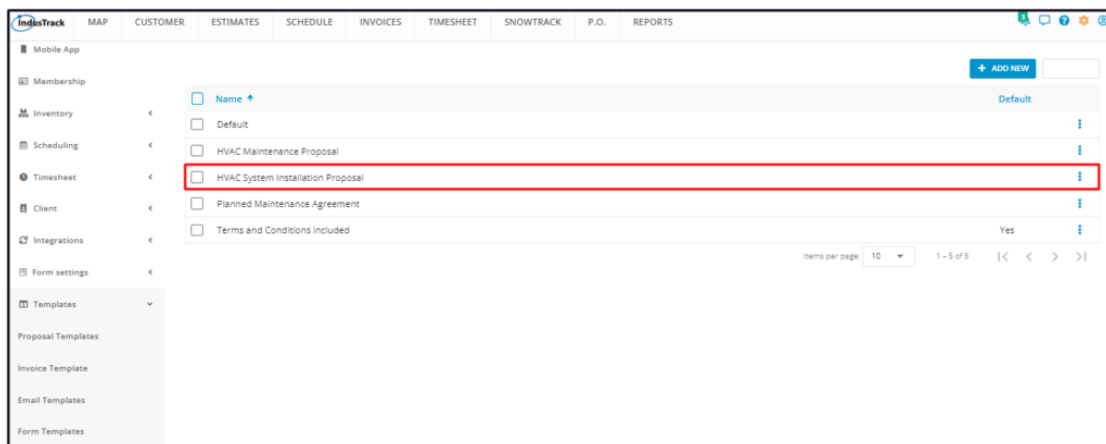
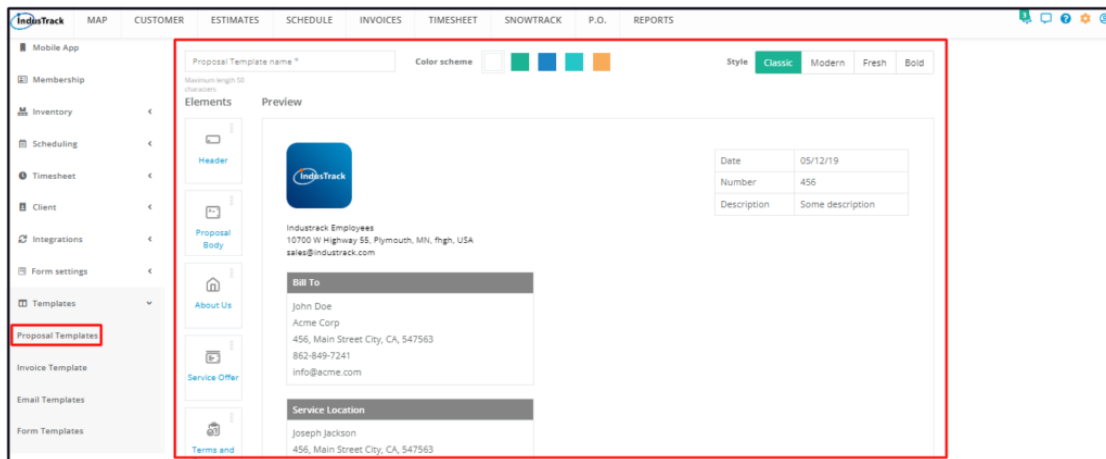
Create a New Proposal Template

To create a Proposal Template from scratch, click **+Add New** from the Proposal Templates page.



Create the Proposal Template from the **template builder**. See the section *Using the Proposal Template Builder* below.

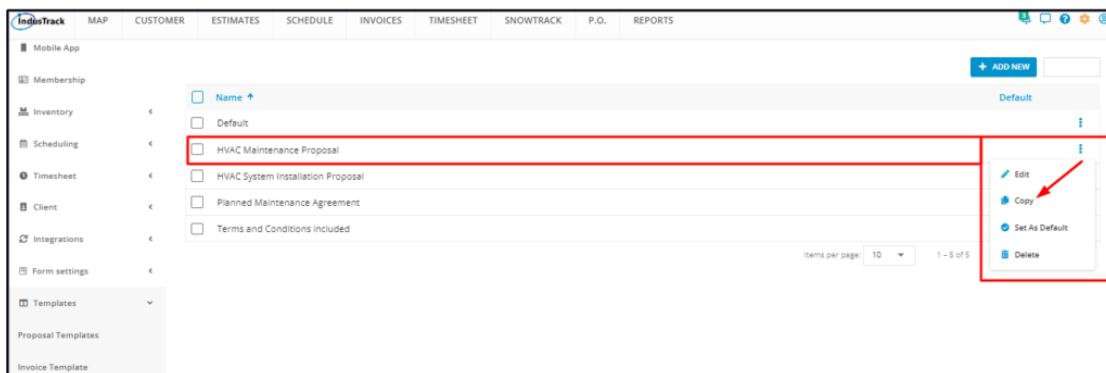
Save the new template once done. This will be added to the list of Proposal Templates.



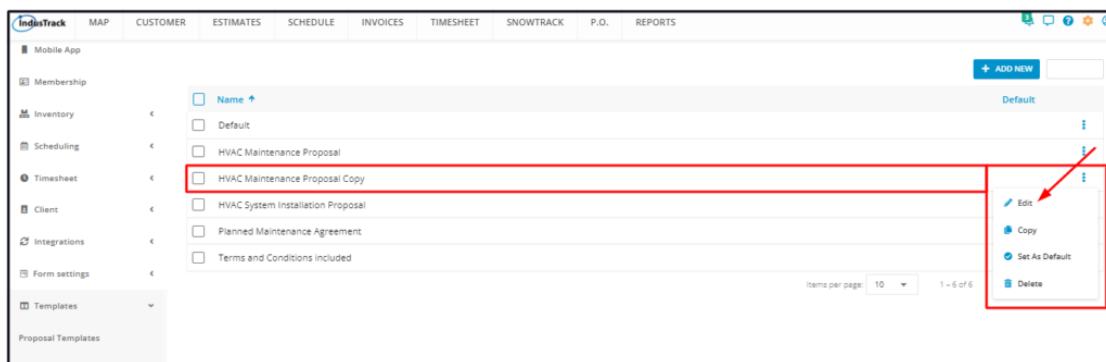
Duplicate an Existing Proposal Template

Instead of creating a new proposal template from scratch, duplicate one that has similar details as the one to be created. Update the copy to suit the new Proposal Template details. Doing this will save a lot of time in creating a new proposal template that is similar, but with differences, to an existing one.

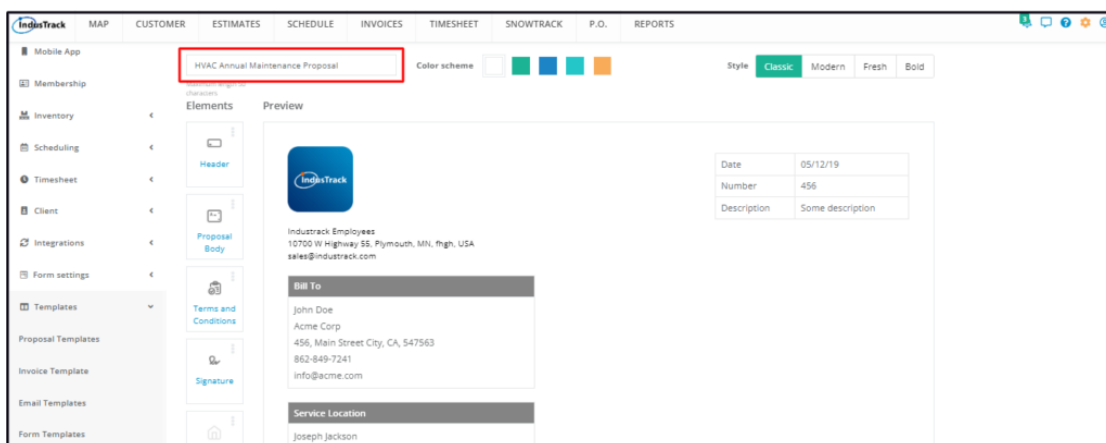
From the Proposal Templates List, find the one to be duplicated. Go to the 3-dot menu to its right and select **Copy**.



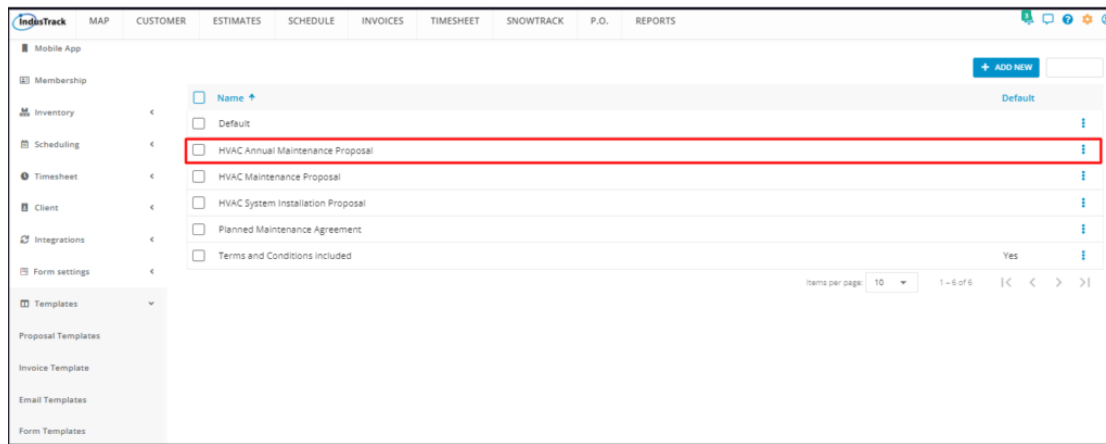
A duplicate copy of the template will be added to the list. Open this in edit mode.



Revise the Proposal Template name or title.



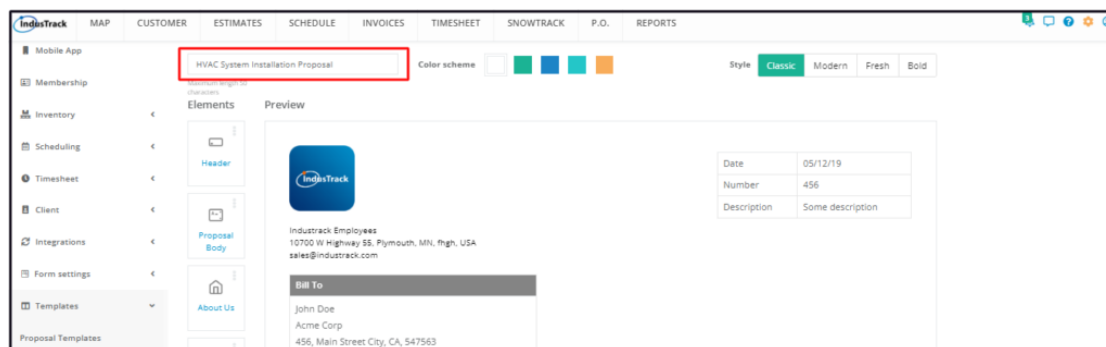
Update the details of the template copy from the template builder. Once done, **Save** the new template. The templates list will show the updated name of the copy.



Using the Proposal Template Builder

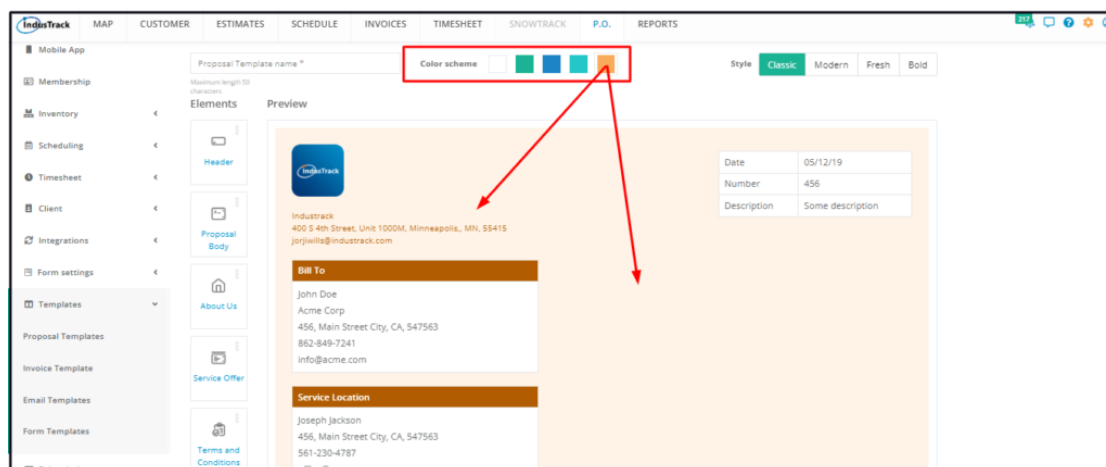
Proposal Template Name

Key in the **name or title** of the Proposal Template on the field. The maximum allowable number of characters for the title is 50.



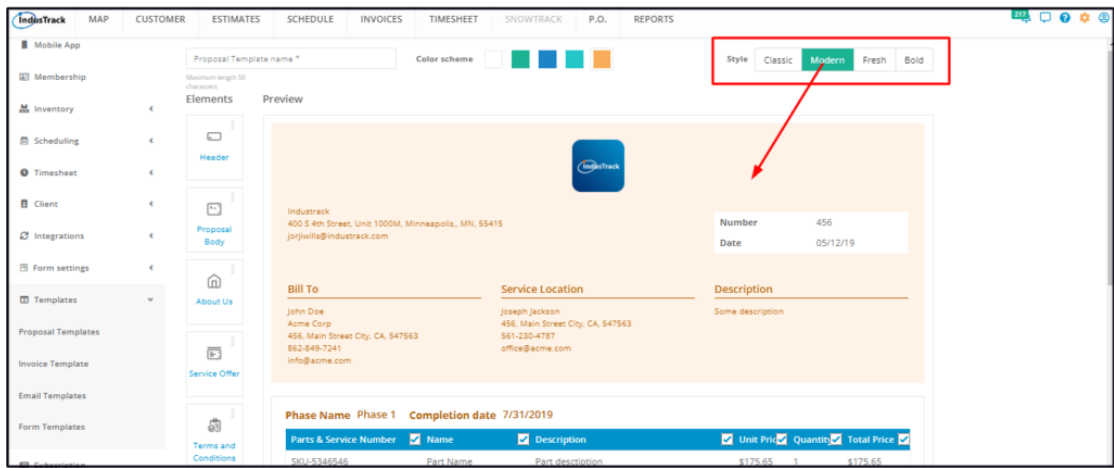
Color Scheme

Set the color scheme of your proposal. The default scheme is white. Select from the provided options.



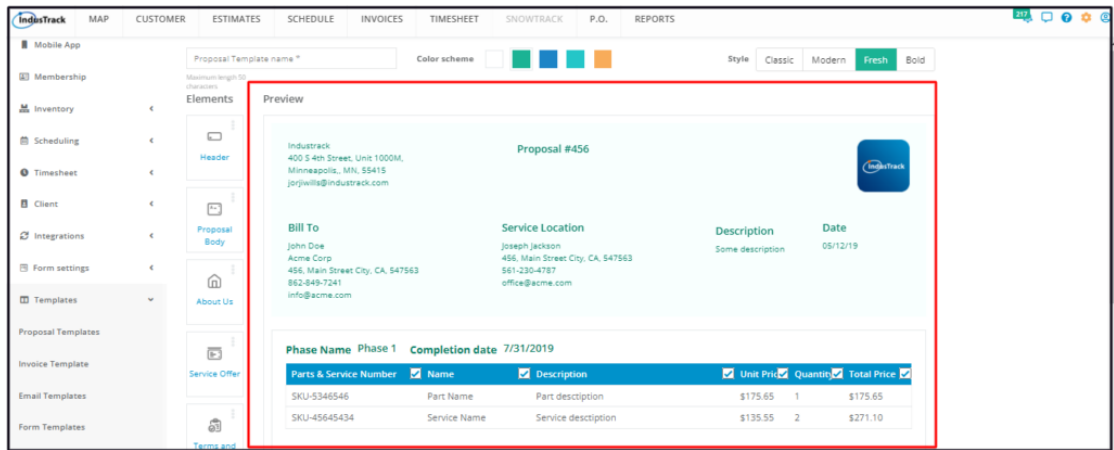
Style

The default design or style or layout of the template is Classic. You have the option to change this to Modern, Fresh or Bold.



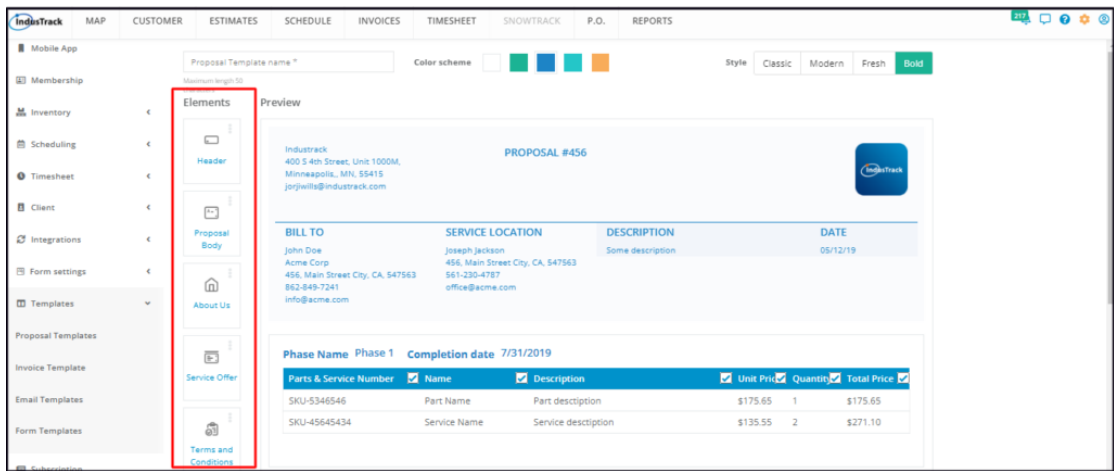
Preview

This section is where the contents of the enabled elements will be displayed. Any changes made to the elements, color and style can be viewed in this section as changes are made.



The Elements

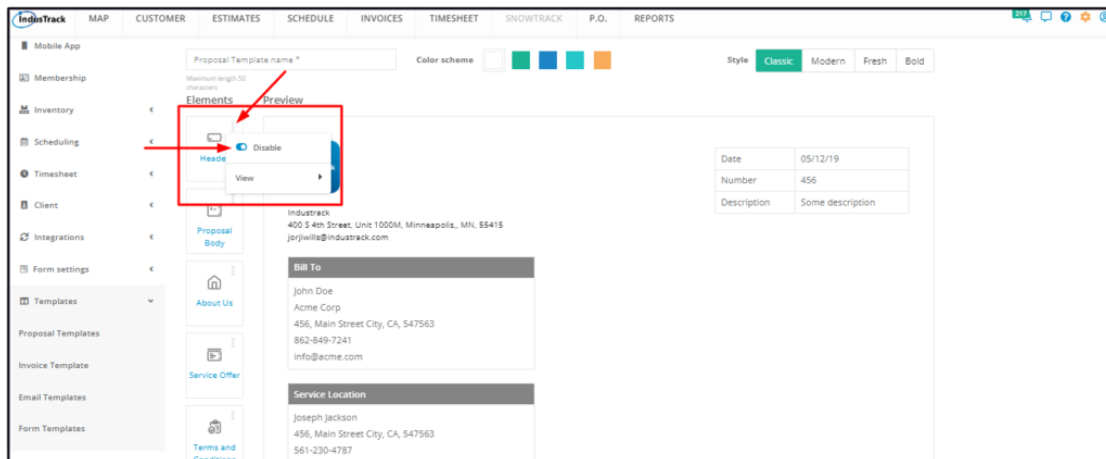
Add the Elements or Components to your builder. Use the available elements to add details to your proposal templates such as the header, service offerings, signature and others.



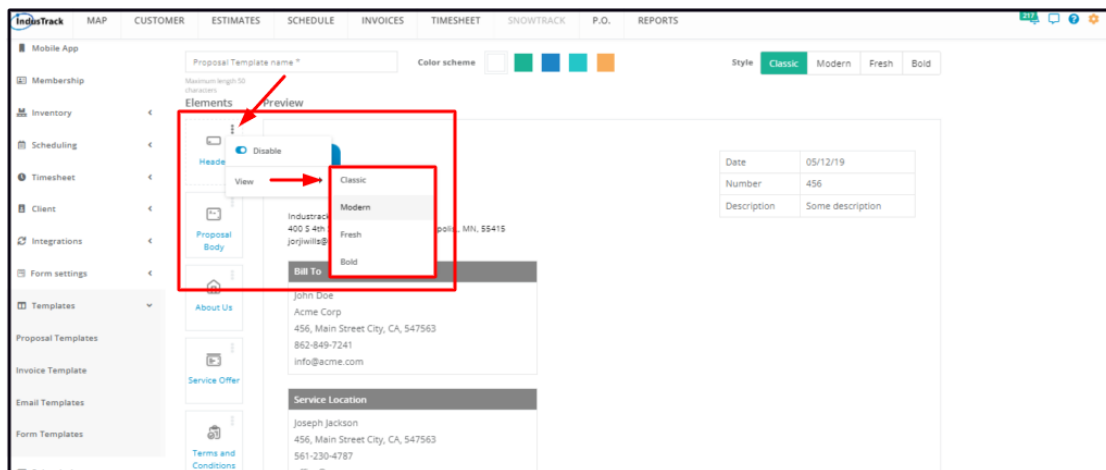
Each of the components has different formatting functions.

Header

- Enable the **Header** element to add this to the template. When enabled, the Header panel will be visible on the Preview.
- Click on the toggle switch to either enable or disable the element.
- If the element is disabled, this will be greyed out.



- From the view option, select the style or design of the template. This option is the same as the Style option at the upper right-hand corner of the builder.



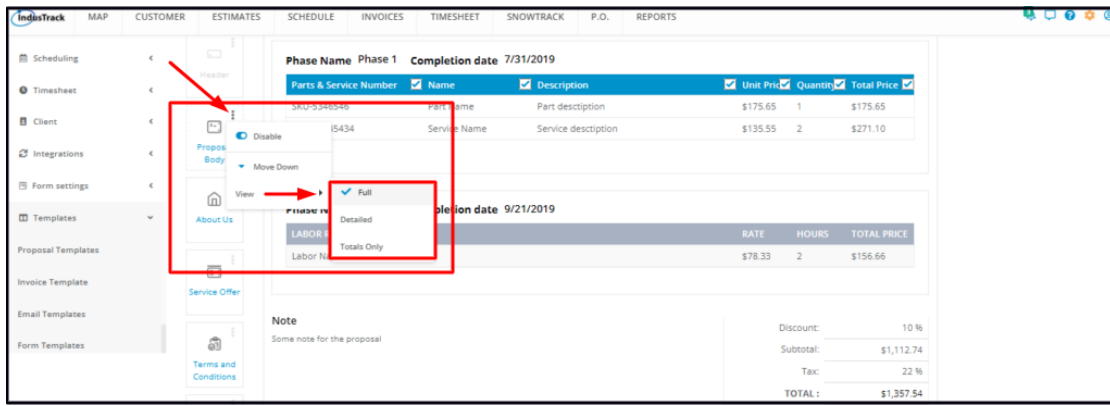
- The Header Element contains the placeholders for:
 - Company Logo, Physical Address and Email – The information will be visible in your template and proposal depending on how you set up your company's Information in the system via the Company Settings page.
 - Billing Details – This is a placeholder on the template. The information will be pulled from the client's Contact Information and automatically added to your proposal.
 - Service Location – This is a placeholder on the template. The information will be pulled from the client's Contact Information and automatically added to your proposal.
 - Date – This is the placeholder for the current date or date when the estimate was created.
 - Number – This is the placeholder for the Estimate or Proposal Number.
 - Description – This is the placeholder to be used to key in a short description of the estimate.

Proposal Body

- Enable the **Proposal Body** element to add this to the template. When enabled, the panel will be visible on the Preview.
- Click on the toggle switch to either enable or disable the element.
- If the element is disabled, this will be greyed out.

- The Proposal Body element contains the placeholders for the estimate details including the parts, services, assemblies, equipment and labor.
- This element also includes placeholders for Totals, Subtotals, Discounts, Taxes and Notes.

- From the view option, select how the estimate details will be displayed if the template is used, either Full, Detailed or Totals Only



Phase Name Phase 1 Completion date 7/31/2019

Parts & Service Number	Name	Description	Unit Price	Quantity	Total Price
SKU-5346546	Part Name	Part description	\$175.65	1	\$175.65
SKU-45645434	Service Name	Service description	\$135.55	2	\$271.10

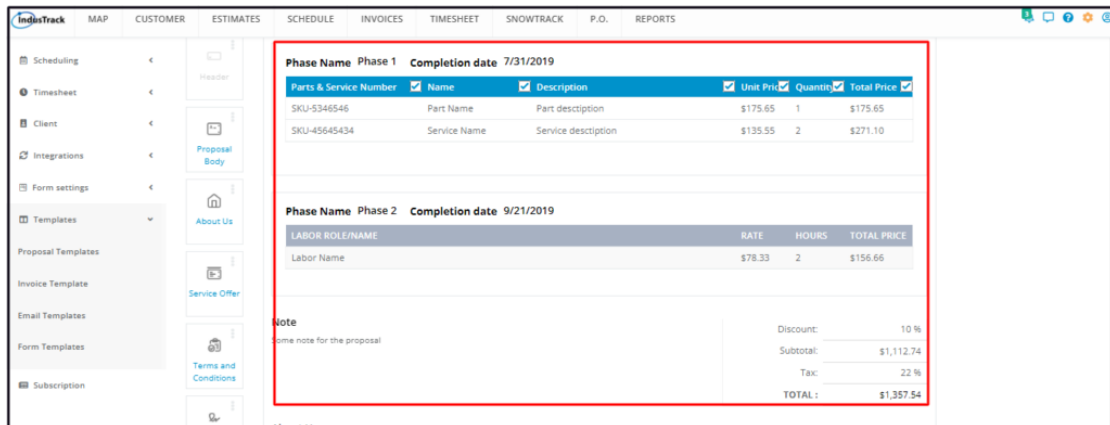
Phase Name Phase 2 Completion date 9/21/2019

LABOR ROLE/NAME	RATE	HOURS	TOTAL PRICE
Labor Name	\$78.33	2	\$156.66

Note
Some note for the proposal

Discount: 10 %
Subtotal: \$1,112.74
Tax: 22 %
TOTAL: \$1,357.54

- Full View
 - Under this view, select which of the columns will be included (or not included) on the Proposal Template. From the Preview Section, tick or untick the checkboxes of the column headers to do this.



Phase Name Phase 1 Completion date 7/31/2019

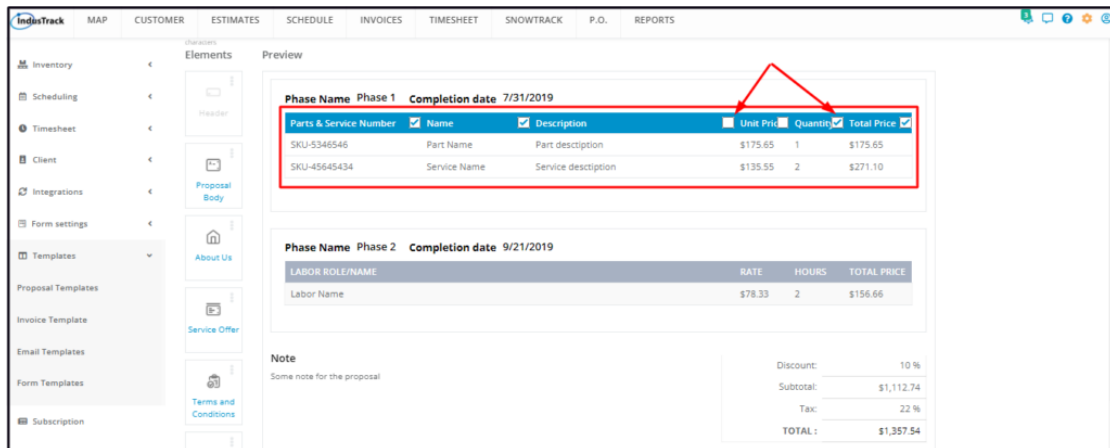
Parts & Service Number	Name	Description	Unit Price	Quantity	Total Price
SKU-5346546	Part Name	Part description	\$175.65	1	\$175.65
SKU-45645434	Service Name	Service description	\$135.55	2	\$271.10

Phase Name Phase 2 Completion date 9/21/2019

LABOR ROLE/NAME	RATE	HOURS	TOTAL PRICE
Labor Name	\$78.33	2	\$156.66

Note
Some note for the proposal

Discount: 10 %
Subtotal: \$1,112.74
Tax: 22 %
TOTAL: \$1,357.54



Phase Name Phase 1 Completion date 7/31/2019

Parts & Service Number	Name	Description	Unit Price	Quantity	Total Price
SKU-5346546	Part Name	Part description	\$175.65	1	\$175.65
SKU-45645434	Service Name	Service description	\$135.55	2	\$271.10

Phase Name Phase 2 Completion date 9/21/2019

LABOR ROLE/NAME	RATE	HOURS	TOTAL PRICE
Labor Name	\$78.33	2	\$156.66

Note
Some note for the proposal

Discount: 10 %
Subtotal: \$1,112.74
Tax: 22 %
TOTAL: \$1,357.54

- Detailed View

Phase Name		Phase 1	Completion date	7/31/2019
Parts & Services				Total Price
				\$446.75
Equipments				Total Price
				\$178.16
Assets				Total Price
				\$265.80
LABOR				TOTAL PRICE
				\$189.00
Phase Name		Phase 2	Completion date	9/21/2019
LABOR				TOTAL PRICE
				\$156.66

- Totals Only View

Mobile App

Membership

Inventory

Scheduling

Timesheet

Client

Integrations

Form settings

Templates

Proposal Templates

Invoice Template

Email Templates

Form Templates

Proposal Template name *

Color scheme

Style

Classic

Modern

Fresh

Bold

Maximum length 50 characters

Elements

Preview

Header

Phase Name Phase 1 Completion date 7/31/2019

TOTAL PRICE: \$1,079.71

Proposal Body

Phase Name Phase 2 Completion date 9/21/2019

TOTAL PRICE: \$156.66

About Us

Note

Some note for the proposal

Discount: 10 %

Subtotal: \$1,112.74

Tax: 22 %

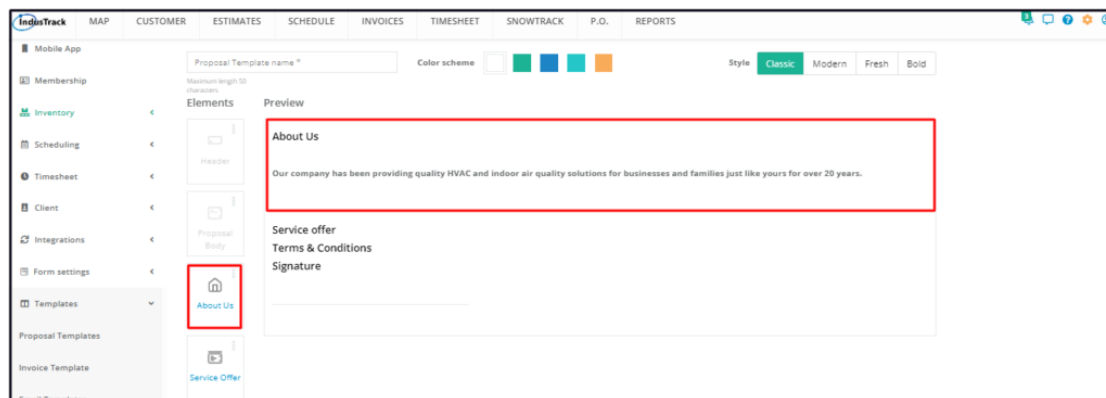
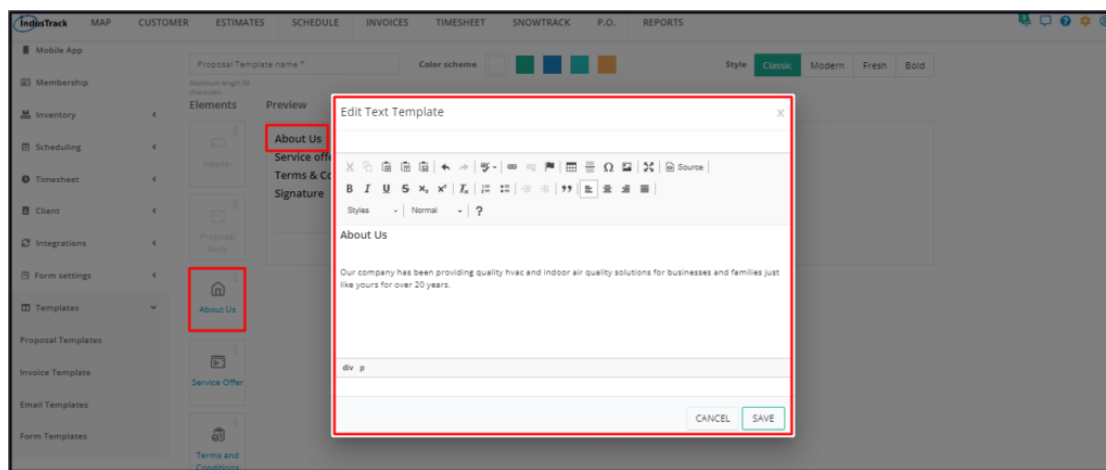
TOTAL : \$1,357.54

About Us

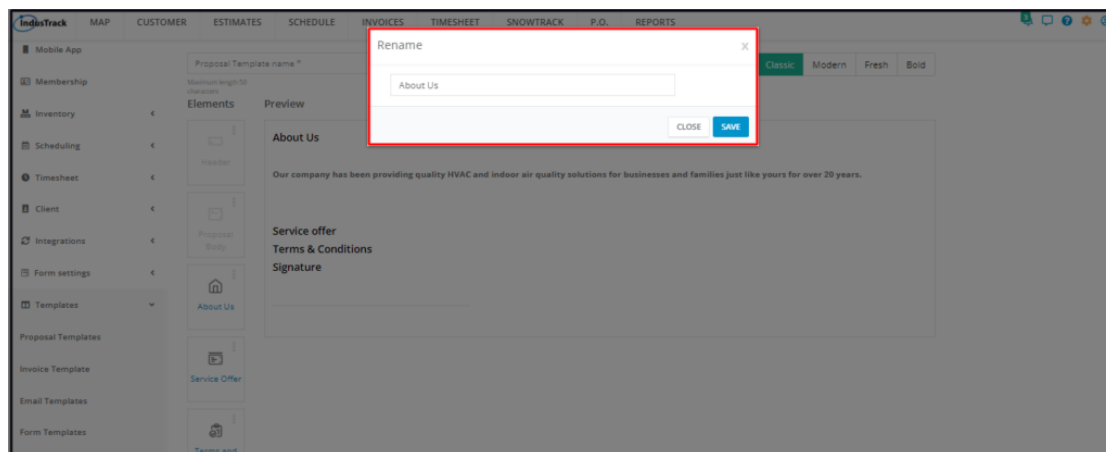
- Enable the **About Us** element to add this to the template. When enabled, the About Us panel will be visible on the Preview.
- Click on the toggle switch to either enable or disable the element.
- If the element is disabled, this will be greyed out.

The screenshot displays the IndioTrack web application interface. The top navigation bar includes links for MAP, CUSTOMER, ESTIMATES, SCHEDULE, INVOICES, TIMESHEET, SNOWTRACK, P.O., and REPORTS. The left sidebar contains a list of modules: Mobile App, Membership, Inventory, Scheduling, Timesheet, Client, Integrations, Form settings, Templates, Proposal Templates, Invoice Template, Email Templates, and Form Templates. The 'Proposal Templates' module is currently selected, showing a list of templates. The 'About Us' template is highlighted with a red box. A context menu is open for this template, showing options: Disable, Edit, Rename, Move Up, and Move Down. A red arrow points to the 'Disable' button.

- To add information about the company, select **Edit** from the 3-dot menu. This will bring up the About Us text editor. Key in or paste the details and **Save**.

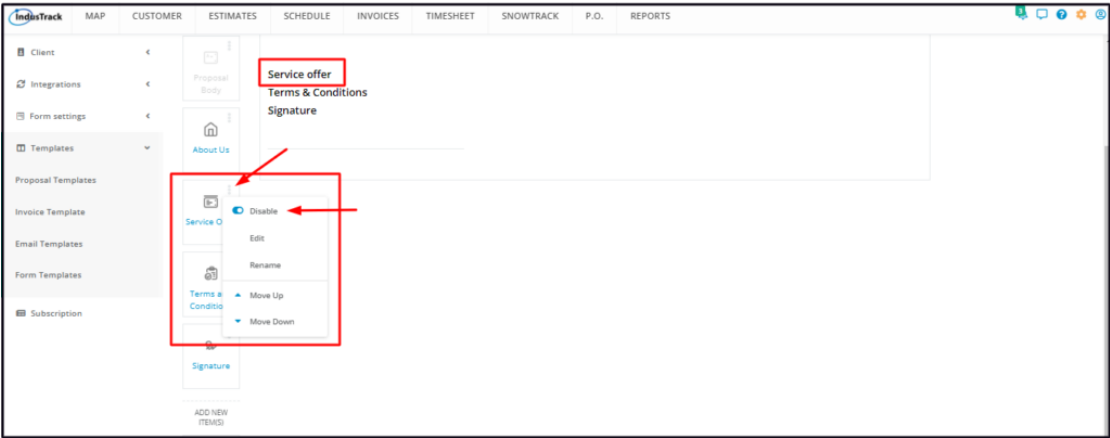


- To edit the element title “About Us”, select **Rename** from the 3-dot menu. Edit the title accordingly and Save.

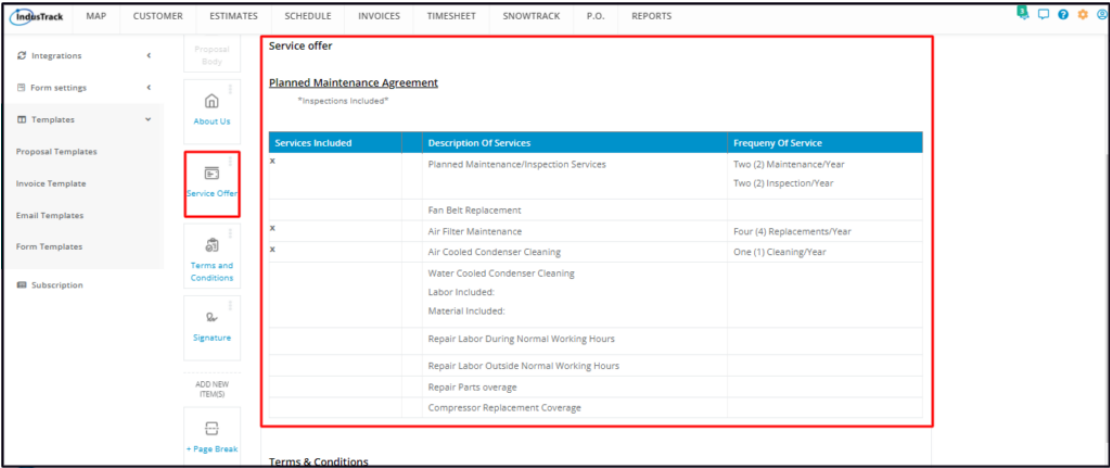
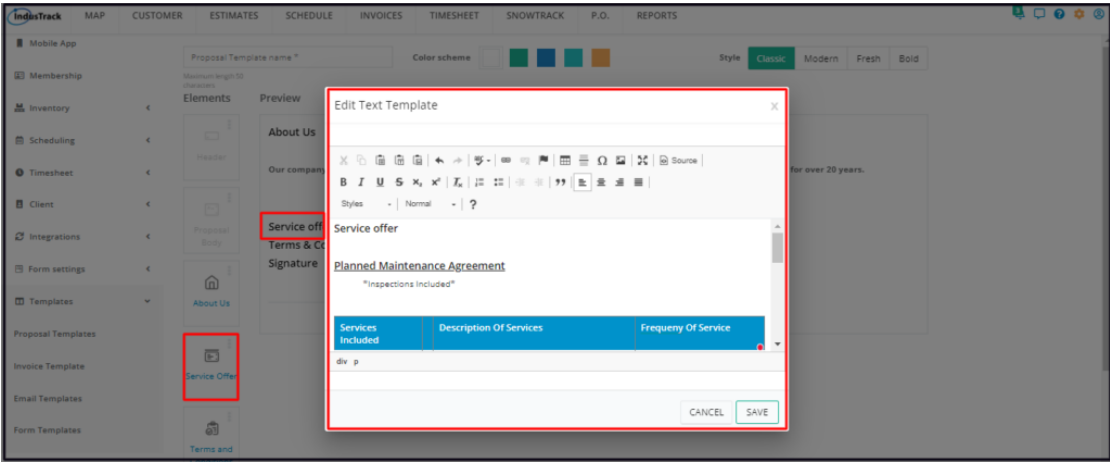


Service Offer

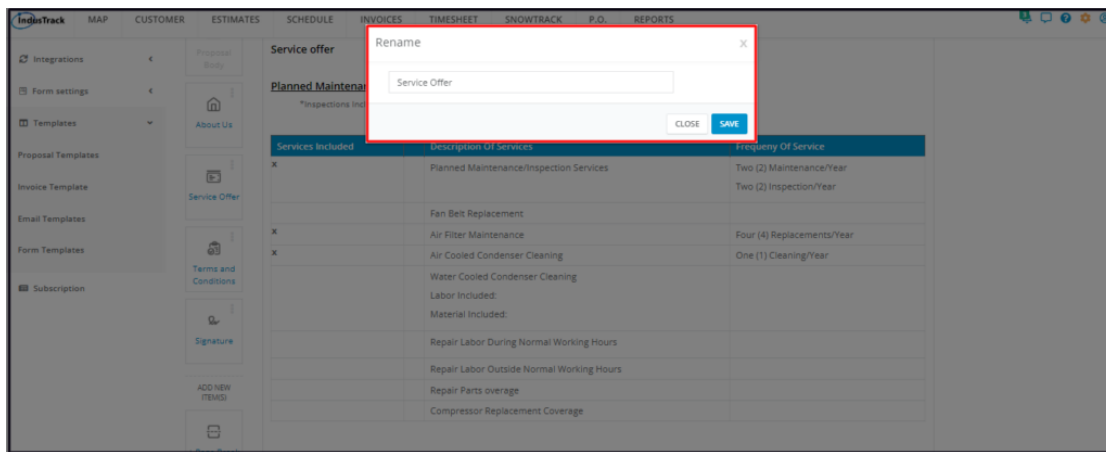
- Enable the **Service Offer** element to add this to the template. When enabled, the Service Offer panel will be visible on the Preview.
- Click on the toggle switch to either enable or disable the element.
- If the element is disabled, this will be greyed out.



- To add information about the services offered, select **Edit** from the 3-dot menu. This will bring up the text editor. Key in or paste the details and Save.

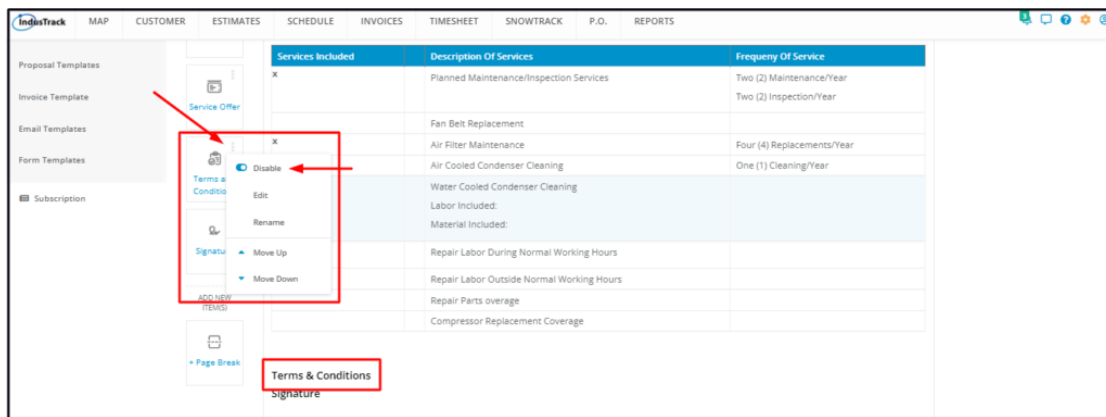


- To edit the element title “Service Offer”, select **Rename** from the 3-dot menu. Edit the title accordingly and **Save**.

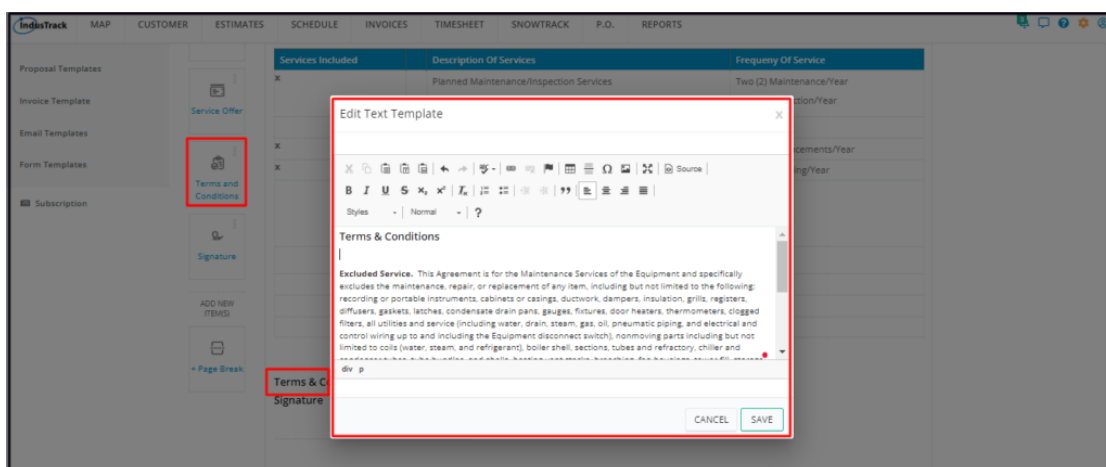


Terms and Conditions

- Enable the **Terms and Conditions** element to add this to the template. When enabled, the T&Cs panel will be visible on the Preview.
- Click on the toggle switch to either enable or disable the element.
- If the element is disabled, this will be greyed out.

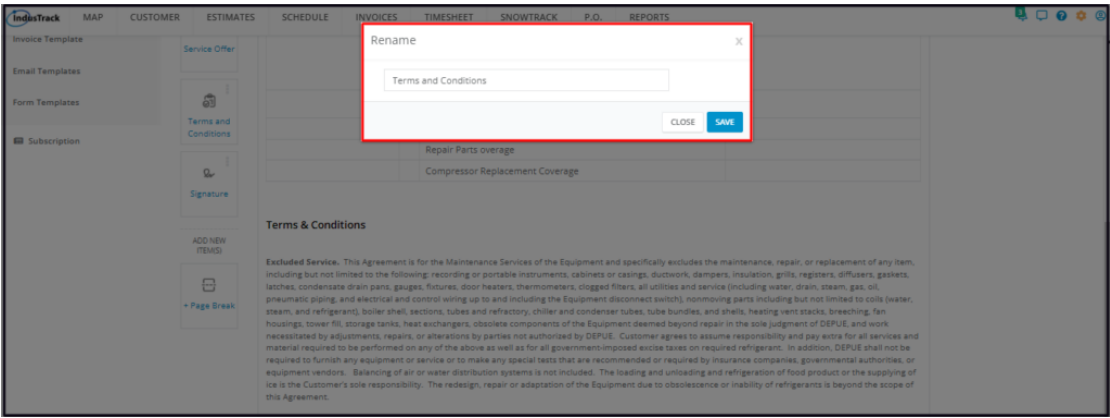


- To add information about the terms and conditions, select **Edit** from the 3-dot menu. This will bring up the text editor. Key in or paste the details and Save.



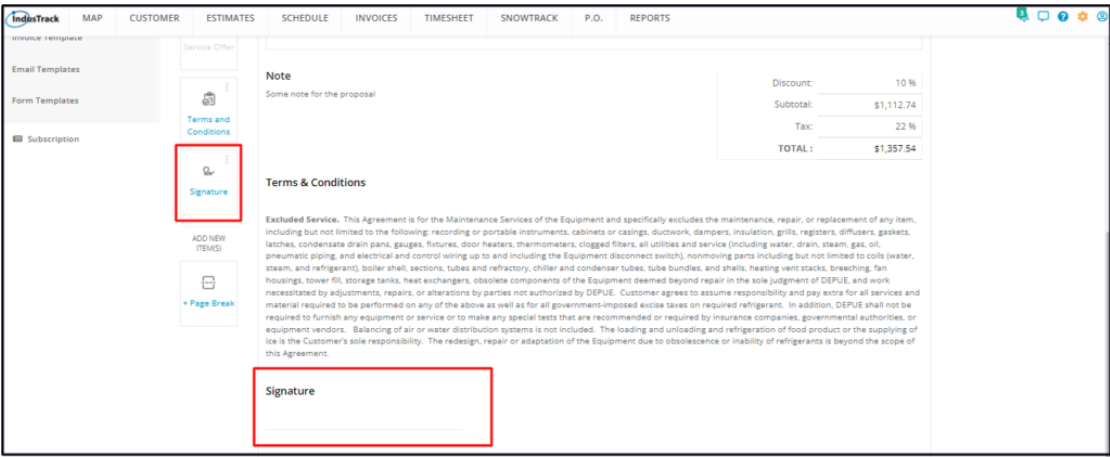


- To edit the element title “Terms and Conditions”, select **Rename** from the 3-dot menu. Edit the title accordingly and **Save**.



Signature

- The **Signature** element is a fixed panel on the Proposal Template. The only option available for this element is its place or order on the template.



Service	Frequency
Planned Maintenance/Inspection Services	Two (2) Maintenance/Year Two (2) Inspection/Year
Fan Belt Replacement	
Air Filter Maintenance	Four (4) Replacements/Year
Air Cooled Condenser Cleaning	One (1) Cleaning/Year
Water Cooled Condenser Cleaning	
Labor Included:	
Material Included:	
Repair Labor During Normal Working Hours	
Repair Labor Outside Normal Working Hours	
Repair Parts overage	
Compressor Replacement Coverage	

Page Break

- The + **Page Break** element can be used multiple times in a template. Using the element will cause the printing of a new page at the point it occurs on the template.
- Click on the element to add a page break to the template.

Terms & Conditions

Excluded Service. This Agreement is for the Maintenance Services of the Equipment and specifically excludes the maintenance, repair, or replacement of any item, including but not limited to the following: recording or portable instruments, cabinets or casings, ductwork, dampers, insulation, grills, registers, diffusers, gaskets, latches, condensate drain pans, gauges, fixtures, door heaters, thermometers, clogged filters, all utilities and service (including water, drain, steam, gas, oil, pneumatic piping, and electrical and control wiring up to and including the Equipment disconnect switch), nonmoving parts including but not limited to coils (water, steam, and refrigerant), boiler shell, sections, tubes and refractory, chiller and condenser tubes, tube bundles, and shells, heating vent stacks, breaching, fan housings, tower fill, storage tanks, heat exchangers, obsolete components of the Equipment deemed beyond repair in the sole judgment of DEPU, and work necessitated by adjustments, repairs, or alterations by parties not authorized by DEPU. Customer agrees to assume responsibility and pay extra for all services and material required to be performed on any of the above as well as for all government-imposed excise taxes on required refrigerant. In addition, DEPU shall not be required to furnish any equipment or service or to make any special tests that are recommended or required by insurance companies, governmental authorities, or equipment vendors. Balancing of air or water distribution systems is not included. The loading and unloading and refrigeration of food product or the supplying of ice is the Customer's sole responsibility. The redesign, repair or adaptation of the Equipment due to obsolescence or inability of refrigerants is beyond the scope of this Agreement.

Signature

Page Break

- Move the element to where the break will occur. Use the **Move Up** or **Move Down** options.

Service Offer

Labor Included:

Material Included:

Repair Labor During Normal Working Hours

Repair Labor Outside Normal Working Hours

Repair Parts overage

Compressor Replacement Coverage

Terms & Conditions

Excluded Service. This Agreement is for the Maintenance Services of the Equipment and specifically excludes the maintenance, repair, or replacement of any item, including but not limited to the following: recording or portable instruments, cabinets or casings, ductwork, dampers, insulation, grills, registers, diffusers, gaskets, latches, condensate drain pans, gauges, fixtures, door heaters, thermometers, clogged filters, all utilities and service (including water, drain, steam, gas, oil, pneumatic piping, and electrical and control wiring up to and including the Equipment disconnect switch), nonmoving parts including but not limited to coils (water, steam, and refrigerant), boiler shell, sections, tubes and refractory, chiller and condenser tubes, tube bundles, and shells, heating vent stacks, breaching, fan housings, tower fill, storage tanks, heat exchangers, obsolete components of the Equipment deemed beyond repair in the sole judgment of DEPU, and work necessitated by adjustments, repairs, or alterations by parties not authorized by DEPU. Customer agrees to assume responsibility and pay extra for all services and material required to be performed on any of the above as well as for all government-imposed excise taxes on required refrigerant. In addition, DEPU shall not be required to furnish any equipment or service or to make any special tests that are recommended or required by insurance companies, governmental authorities, or equipment vendors. Balancing of air or water distribution systems is not included. The loading and unloading and refrigeration of food product or the supplying of ice is the Customer's sole responsibility. The redesign, repair or adaptation of the Equipment due to obsolescence or inability of refrigerants is beyond the scope of this Agreement.

Signature

Page Break

- To undo the added page Break, select **Remove** from the 3-dot menu options.

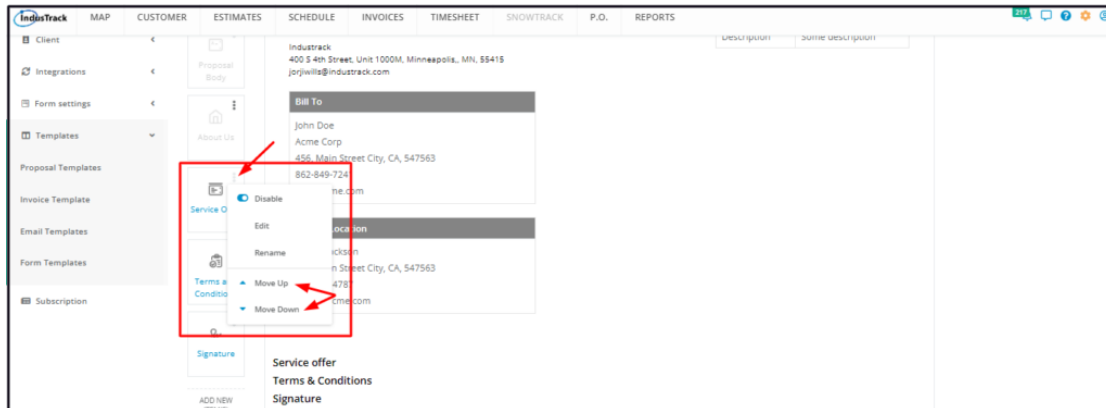


- To add another Page Break element, click the **+Page Break** element at the bottom again.

Elements Order

Move the elements into the order you want them to be placed on the proposal template.

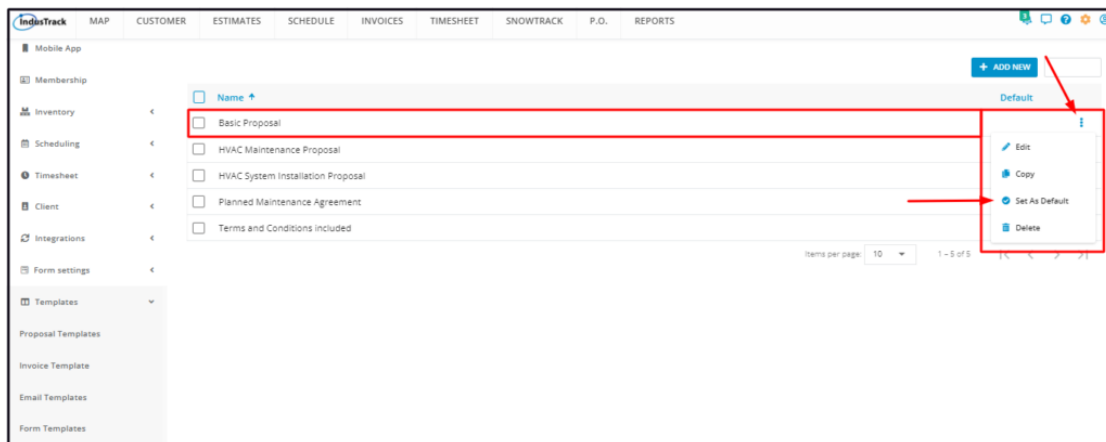
- Click on the 3-dot menu of the element. Either move the element up or down.



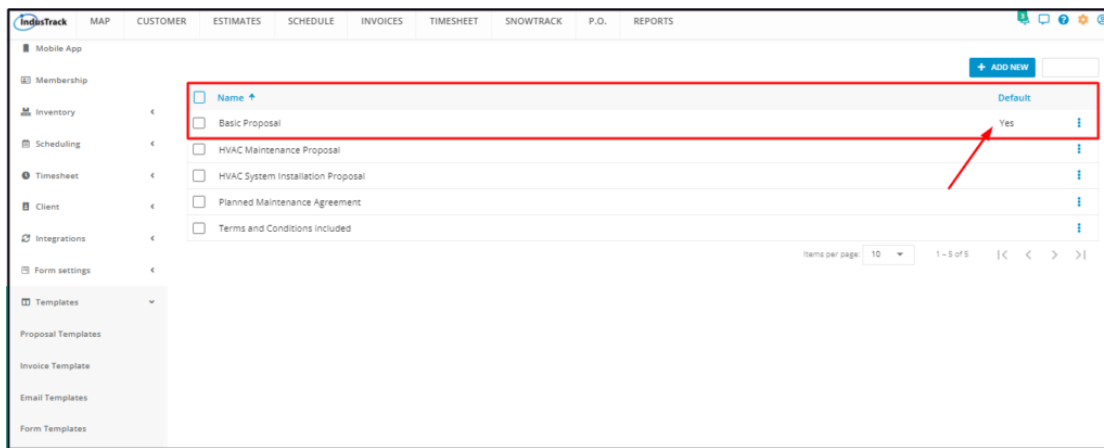
Set a Proposal Template as the Default One

Assign one of the proposal templates on your list as the Default Proposal Template. This means that the selected template will load when a new proposal template is to be created from scratch.

From the Proposal Templates List, find the one to be assigned. Go to the 3-dot menu to its right and select **Set As Default**.



The selected template will now have the “Yes” tag under the column **Default**.



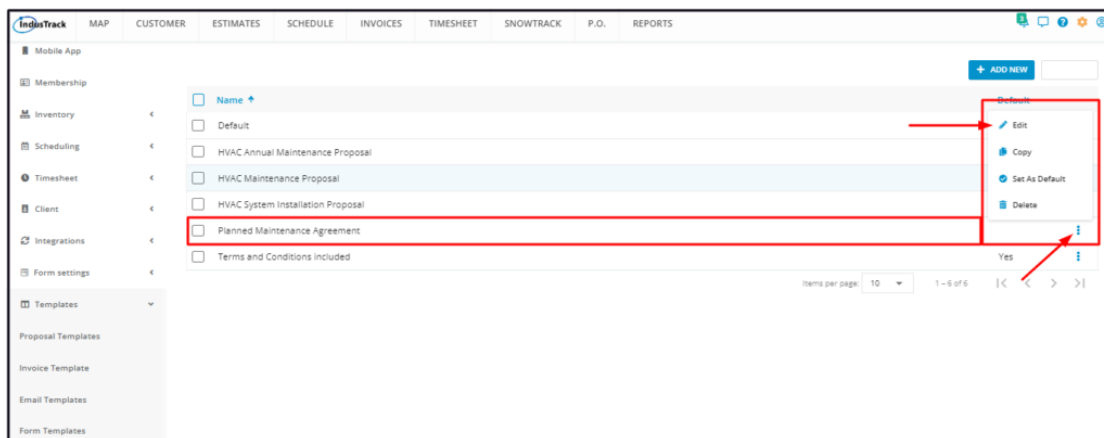
Note that only one template can be set as default at a time. Setting a second template as default will override the existing one.

Edit/Update a Proposal Template

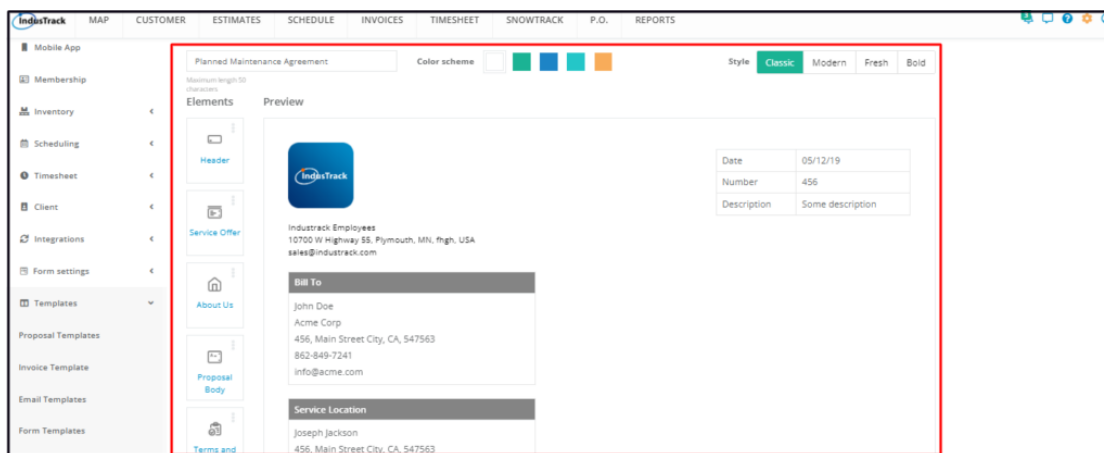
Make changes to existing Proposal Templates.

Note that if the proposal template has been used in previous estimates, the changes will not update the existing estimates. These changes will only apply to new ones.

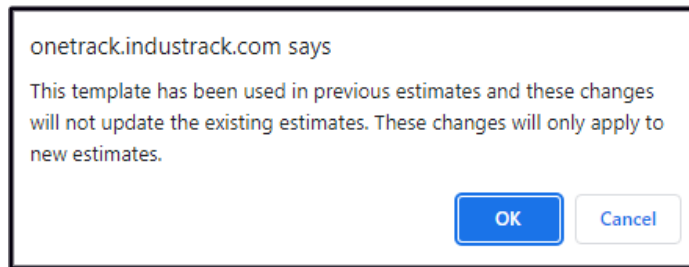
From the Proposal Templates List, find the one to be updated. Go to the 3-dot menu to its right and select **Edit**.



Make the necessary changes to the template using the builder. Once done, **Save** the changes.



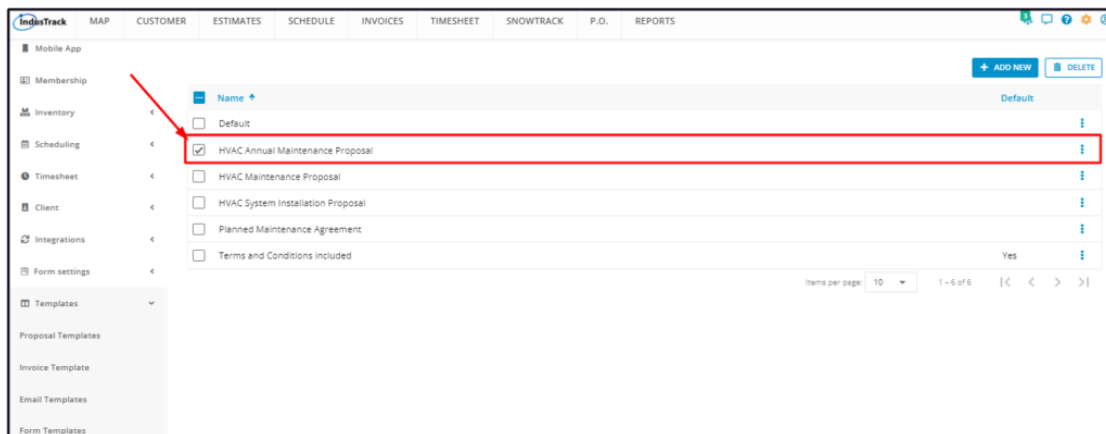
A notification will come up. Click **OK** to proceed with the updating of the template. Select **Cancel** to abandon the action.



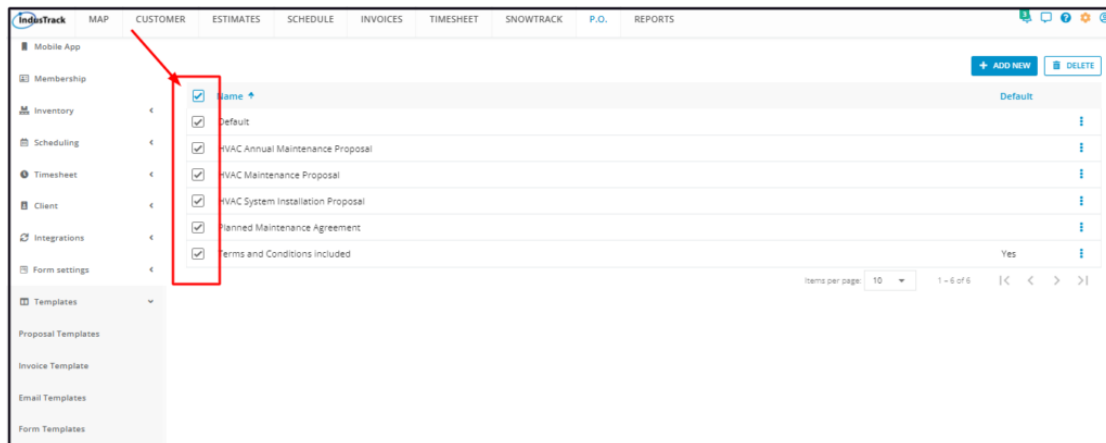
Delete a Proposal Template

Delete a Proposal Template that is no longer in use or was created in error. It is wise to exercise caution when using this function. Deleting a template may have an effect on other functions, settings or data. This action can not be undone.

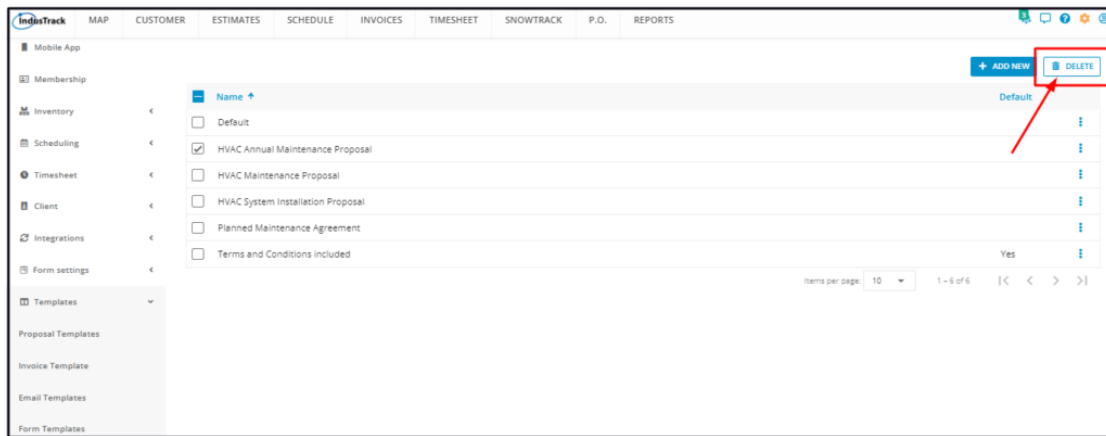
Find the proposal template to be deleted from the list. Tick the checkbox to its left.



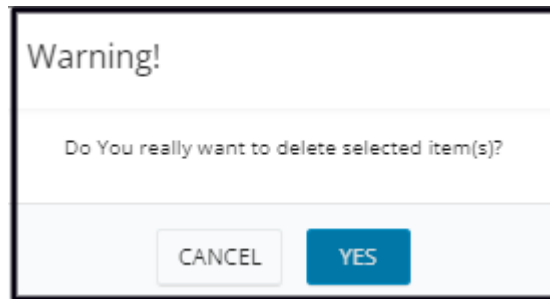
- Alternatively, click on the 3-dot menu to the right of the template and select **Delete**.
- To delete multiple task templates from the list, tick the checkboxes to the left of all. If all items will be deleted, just tick the checkbox of the Name header.



Go to the **Delete** button.



A warning window will come up. Click **Yes** to continue with the deletion and **Cancel** to abandon the action.



The proposal template will be removed from the list.

