Pro: Customer Proposal Customisation

> This guide applies to the **Pro** versions of Heatpunk

With Heatpunk Pro, you are able to customise the **proposal document** that you send to your customers. This can help you align the proposal more with your branding and help you stand out!

What can I customise?

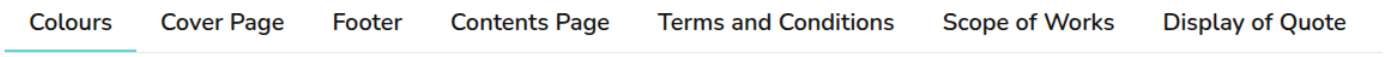
You have the option to:

- Add a custom cover page.
- Customise colours to match your brand.
- Add an 'About us' section to the contents page.
- Configure a branded footer to appear on all pages of the proposal document with your logo and company information.
- Add your terms and conditions and the scope of work sections to the proposal.
- Configure the quote display.

> If you want further customisation of the proposal or want us to create a document entirely to your own specification, please contact us about our **Enterprise package**.

Setting up

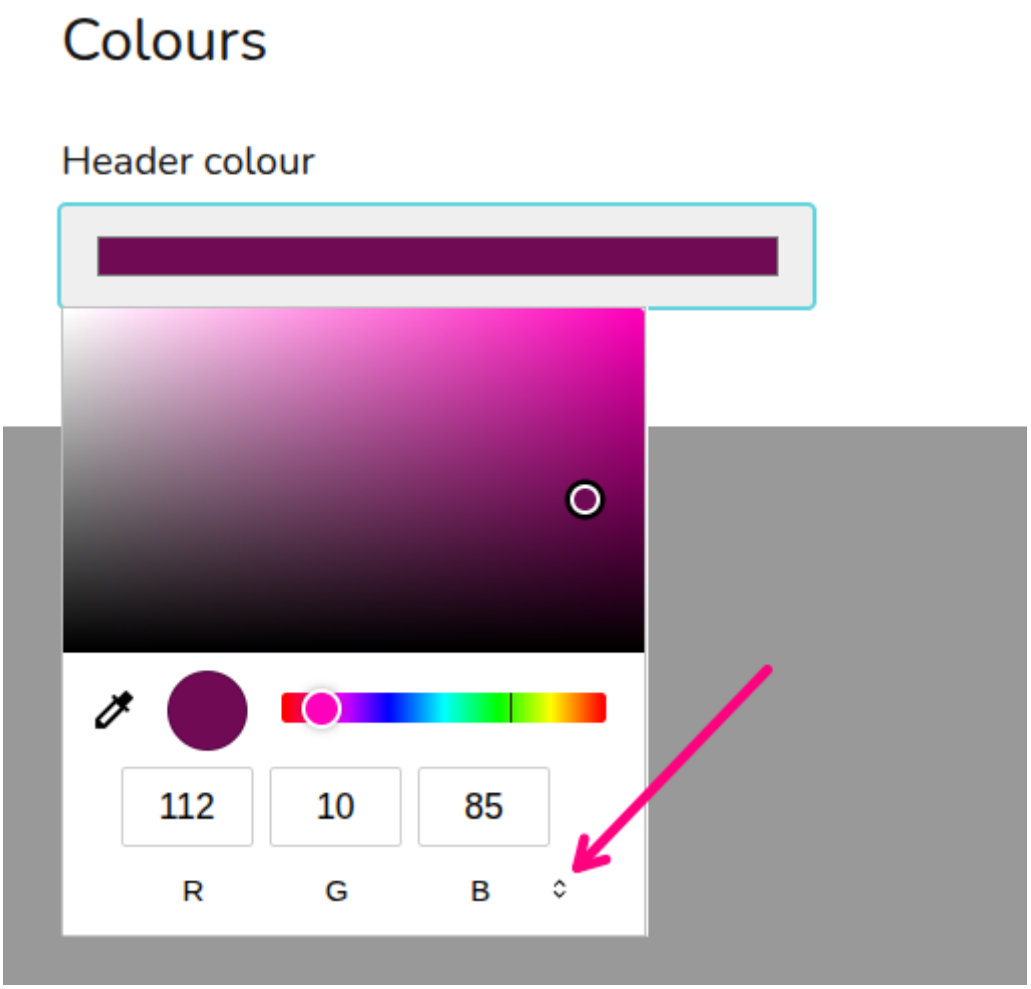
Navigate to **Pro account settings** > **Customer Proposal**. There will also be a **Documents** section in your Pro account settings where you can manage all the images you upload.



Colours

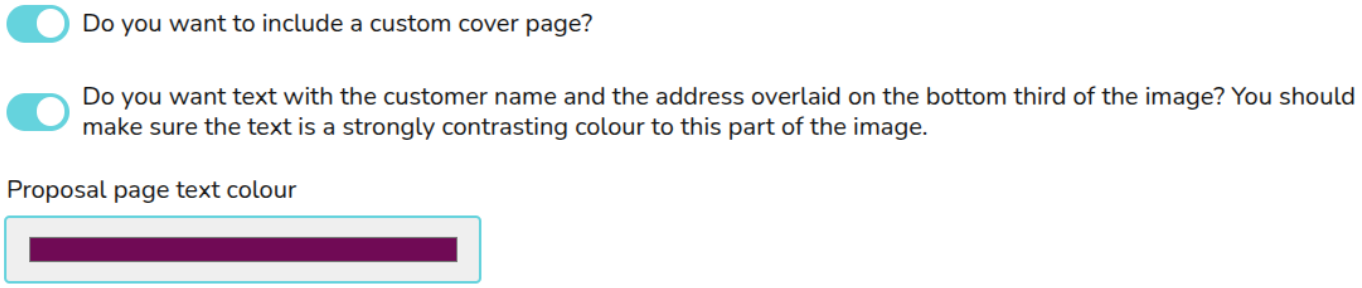
Select the colour you would like **headers** to appear in the proposal document.

You can precisely match this with your branding colours with the RGB, HSL or HEX code, use the arrows to navigate between these options.



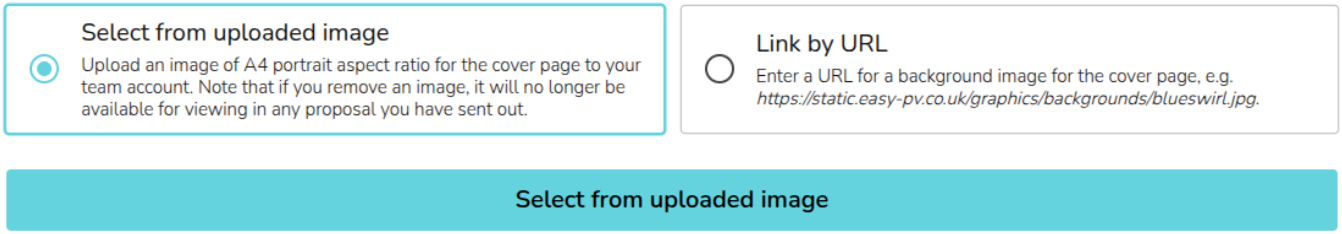
Cover page

Select whether you would like to include a custom cover page and whether you would like the customer name and address overlaid on your cover page and which colour you'd like this text to be.



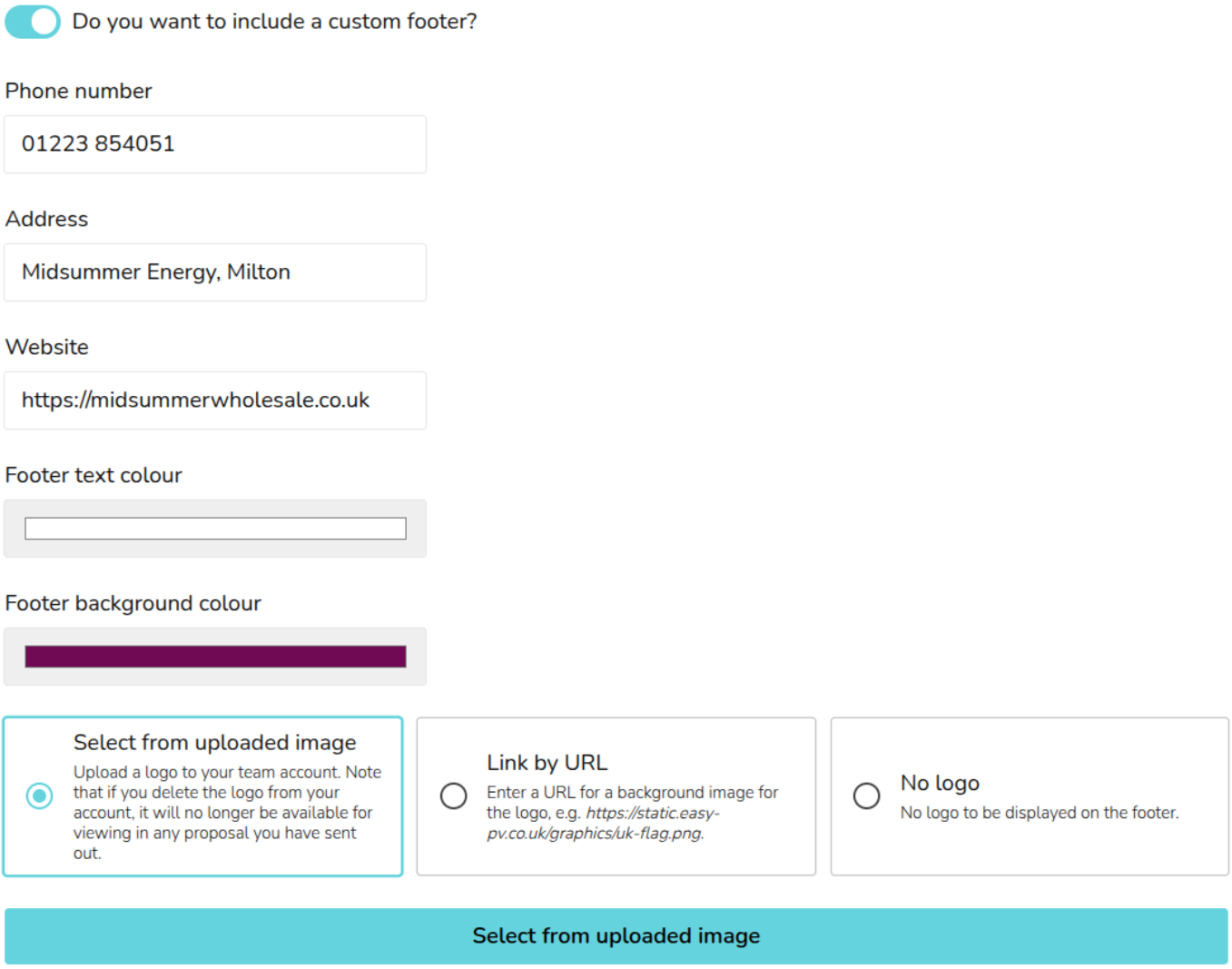
> If you don't already have a preferred way of making a cover page, you might find Canva useful. We have created a template with some additional instructions that you can use to create your own cover page design in Canva. When you are finished, click Share, then download, change the file type to PNG or JPG and download.

Once you have your custom cover page, either add it in the **Documents** tab or in the cover page section click **Select from uploaded image** > **Add images**. After uploading you will be able to select your cover page. You also have the option to use an image from a URL.



Footer

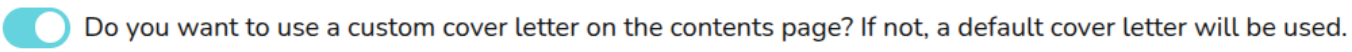
In your custom footer you can input a phone number, address and website. You can also select the footer background and text colour and upload a logo.



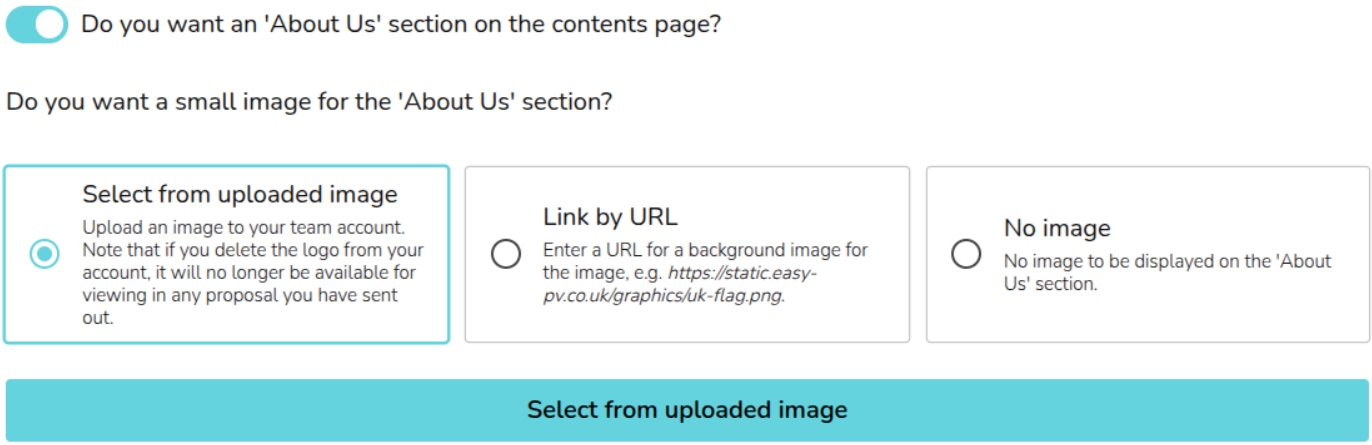
Make sure the footer text does not overflow onto a second line when you generate the proposal or this will cause formatting errors.

Contents page

In this section you can add a custom cover letter with a custom header and contents. This can be overridden on a per-project basis.



You can also include an 'About us' section with an optional custom image. The 'About us' section should be a short description, make sure it does not overflow onto the next page of the proposal.



Terms and conditions and scope of work

Here you can input your terms and conditions and scope of work. In each case you can use the options at the bottom of the text box to format the text:

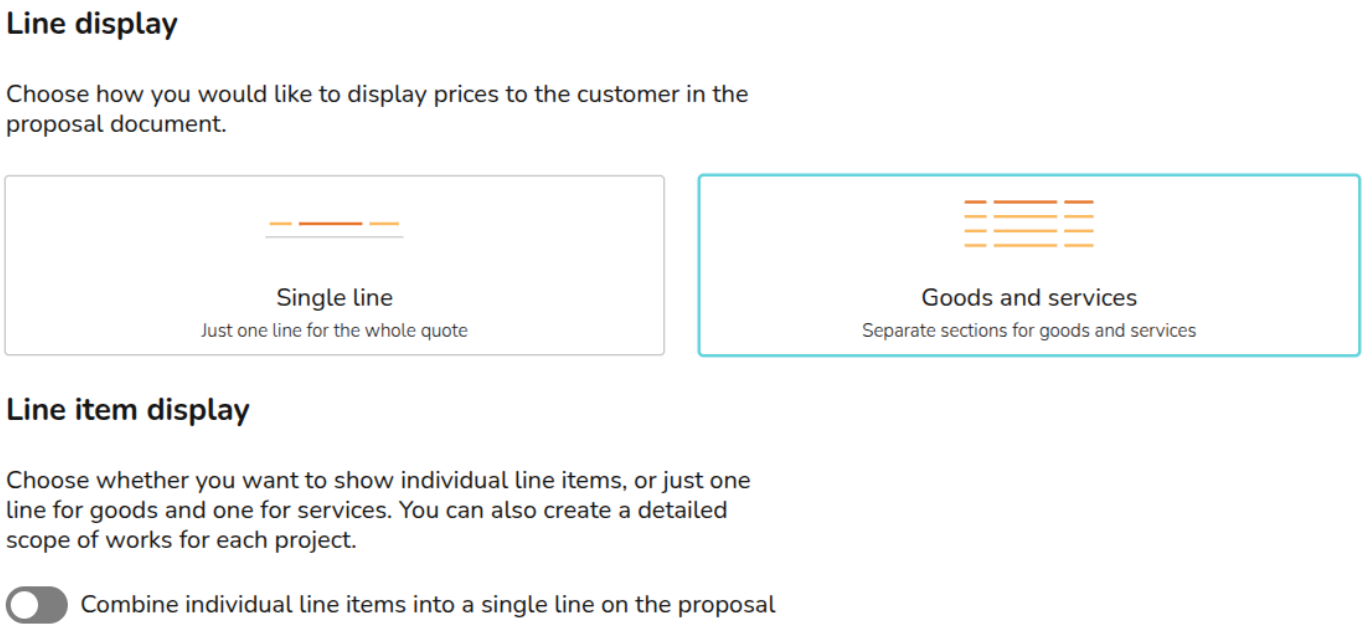
image.png
Image not found or type unknown

Both these options can be overridden on a project by project basis.

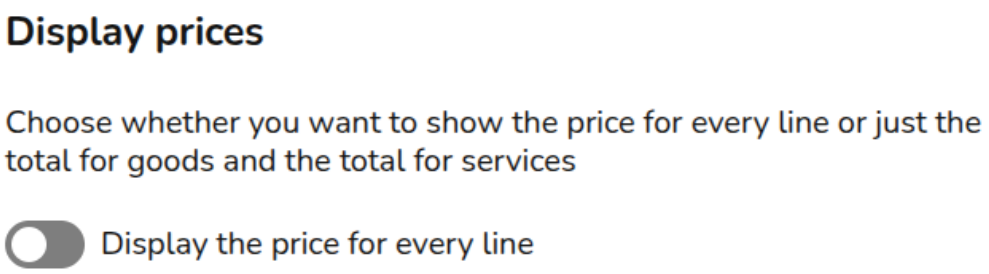
> Changes made to the contents page, terms and conditions and scope of work will **not** automatically refresh in projects where you've already opened the customer proposal task. Click the refresh icon next to where it says 'Customer proposal' to reset those fields to what you've got in your settings.

Display of Quote

In this section you can configure the quote format. Select whether you would like the quote to display goods and services separately and whether you'd like these sections to display as individual lines.



Finally, you can select whether you'd like prices to display for each line item or for it to only show totals or subtotals.



Still Need Help? / Want to know more?

- **Related FAQs:** Check out our Pro and Enterprise FAQs for answers to common questions
- **Further guides**: Take a look at our Pro help guides
- **Live training:** Book onto a live demo session to see these features in action

Contact Support: If you've got further questions, get in touch with our support team at **help@heatpunk.co.uk** (UK) or **help@heatpunk.ie** (IE). *If you are experiencing a bug, to help us look into your issue faster, please include the email address of your account, the name of the project and screenshots of any unexpected behaviour.*

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