

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

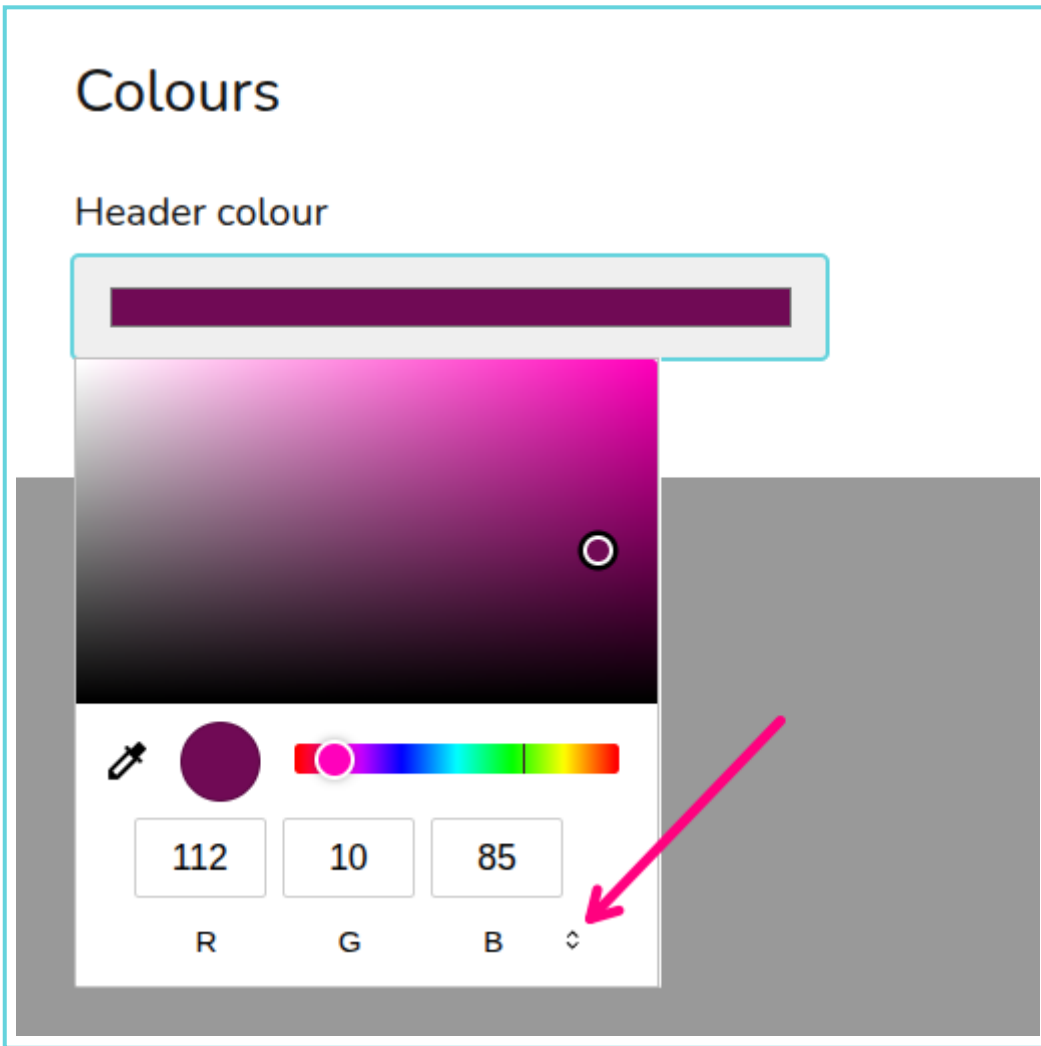
Navigate to **Pro account settings > Customer Proposal**. There will also be a **Documents** section in your Pro account settings where you can manage all the images you upload.

[Colours](#) [Cover Page](#) [Footer](#) [Contents Page](#) [Terms and Conditions](#) [Scope of Works](#) [Display of Quote](#)

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.



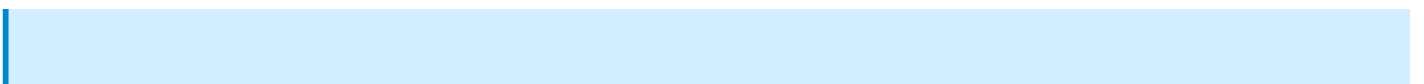
Cover page

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.

Do you want to include a custom cover page?

Do you want text with the customer name and the address overlaid on the bottom third of the image? You should make sure the text is a strongly contrasting colour to this part of the image.

Proposal page text colour



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.

Select from uploaded image

Upload an image of A4 portrait aspect ratio for the cover page to your team account. Note that if you remove an image, it will no longer be available for viewing in any proposal you have sent out.

Link by URL

Enter a URL for a background image for the cover page, e.g. <https://static.easy-pv.co.uk/graphics/backgrounds/blueswirl.jpg>.

Select from uploaded image

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.

Do you want to include a custom footer?

Phone number

01223 854051

Address

Midsummer Energy, Milton

Website

<https://midsummerwholesale.co.uk>

Footer text colour

Footer background colour

Select from uploaded image



Upload a logo to your team account. Note that if you delete the logo from your account, it will no longer be available for viewing in any proposal you have sent out.



Link by URL

Enter a URL for a background image for the logo, e.g. <https://static.easy-pv.co.uk/graphics/uk-flag.png>.



No logo

No logo to be displayed on the footer.

Select from uploaded image

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.

Do you want to use a custom cover letter on the contents page? If not, a default cover letter will be used.

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.

Do you want an 'About Us' section on the contents page?

Do you want a small image for the 'About Us' section?

Select from uploaded image

Upload an image to your team account. Note that if you delete the logo from your account, it will no longer be available for viewing in any proposal you have sent out.

Link by URL

Enter a URL for a background image for the image, e.g. <https://static.easy-pv.co.uk/graphics/uk-flag.png>.

No image

No image to be displayed on the 'About Us' section.

Select from uploaded image

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.

Line display

Choose how you would like to display prices to the customer in the proposal document.



Single line
Just one line for the whole quote



Goods and services
Separate sections for goods and services

Line item display

Choose whether you want to show individual line items, or just one line for goods and one for services. You can also create a detailed scope of works for each project.

Combine individual line items into a single line on the proposal

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

Display prices

Choose whether you want to show the price for every line or just the total for goods and the total for services

Display the price for every line

If you have any additional questions about the customisation options or are having issues setting yours up, [please reach out to our support team](#).

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