

How to use the Contractor Proposal Template

The Contractor Proposal Template is a customizable Word document you can use to build a personalized proposal for your customers. For assistance with creating your proposal, contact your Comfort Ready Home Field Specialist. www.comfortreadyhome.com/contractors/field-specialists/

COVER PAGE

Cover photo

- Right-click the photo and select “Change Picture.”
- Locate the photo you’d like to use and select “Insert.”
- If necessary, select and move the white half-oval so it lines up with the bottom of the photo.

Logo

- Right-click the placeholder logo and select “Change Picture.”
- Locate your logo file and select “Insert.”
- If necessary, resize the logo by selecting the image, holding Shift and dragging the corner. Make sure the logo is not so large that it obscures the information or pushes text to the next page.

Customer name

- Replace the placeholder text with your customer’s name and address.

Contractor name

- Replace the placeholder text with your name and contact information.

Date

- Replace the placeholder date.

PROPOSAL PAGE(S)

Logo and address

- Double-click the top of the page to open the Header & Footer menu.
- Right-click the placeholder logo and select “Change Picture.”
- Locate your logo file and select “Insert.”
- If necessary, resize the logo by selecting the image, holding Shift and dragging the corner. Make sure the logo is not so large that it obscures the information on the page or pushes the information to the next page.
- Replace the placeholder address with the customer’s address.

Contractor statement

- You can customize this statement to provide more detail or personalization.

Measure(s)

- Highlight and delete the measure sections that do not pertain to your proposal.
- Replace the placeholder price in each section header.

- Review the bullet points in each section and adjust as necessary to fit your proposal.
- If you would like to include a brand logo, right-click the placeholder logo and select “Change Picture.” Locate your logo file and select “Insert.” If necessary, resize the logo by selecting it, holding Shift and dragging the corner. Make sure the logo is not so large that it obscures the information or pushes text to the next page.
- If you do not want to include brand logos, select the placeholder logos and delete them.
- If a measure section is split across two pages, add line breaks above that section until it appears fully on the next page.

Rebates

- Replace the rebate amounts in each section. For more information about utility incentives, contact your Comfort Ready Home Field Specialist.

PRICING PAGE

Pricing

- Replace the placeholder price, rebate, tax credit and total price amounts. For more information about incentives and tax credits, contact your Comfort Ready Home Field Specialist.

Fine print

- Review and adjust the fine print to suit your proposal.

Contractor information

- Replace the placeholder text with your company and contact information.

Utility an affiliation logos

- Replace the placeholder logos with the logo of the serving utility and any other relevant logos, such as ENERGY STAR or Comfort Ready Home. Right-click the placeholder logo and select “Change Picture.” Locate your logo file and select “Insert.” If necessary, resize the logo by selecting it, holding Shift and dragging the corner. Make sure the logo is not so large that it obscures the information or pushes text to the next page.
- Delete any extra placeholder logos.