

Template Name: Default Intro message

Content:

Hi {{ contact.addressee | default:contact.name }},

We are looking forward to working with you. At {{ practice.name }}, we are committed to providing you with the best advice, support and services for your business. Our team of experienced professionals are dedicated to help you succeed.

If you have any questions about this proposal or would like to learn more about our services, please do not hesitate to contact us at {{ proposal.sender_email }}.

Kind regards,

{{ proposal.sender_name | default:practice.admin }}
{{ practice.name }}

Template Name: Intro message for existing clients/renewals

Content:

Hi {{ contact.addressee | default:contact.name }},

We are looking forward to continuing to work with you!

Please review your renewed proposal as the terms, services, scope and pricing may have changed since our previous agreement.

If you have any questions about this proposal or would like to learn more about our services, please do not hesitate to contact us at {{ proposal.sender_email }}.

Kind regards,

{{ proposal.sender_name | default:practice.admin }}
{{ practice.name }}

Template Name: Intro message for migrating existing clients to Ignition

Content:

Hi {{contact.addressee | default:contact.name }},

We are looking forward to working with you!

This year we have made some exciting changes to the way we work together. We are using a new electronic engagement process moving forward 🎉

This engagement will clearly list out all the services we'll be providing and the associated fees.

When you view the proposal, click Next in the bottom right hand corner to navigate through the proposal to review, sign and accept electronically.

The proposal provides an overview of the services you will receive as well as outlining when payment is due for these services.

What's changed?

- Once you have reviewed each step of this proposal and have signed electronically, you will **automatically receive a signed copy of your engagement via email**.
- Your invoices will be automatically sent to you via email on the billing schedule agreed to in the **Schedule** step of this proposal.
- We are moving to **automated payment collections**. Why? So your business and ours can better manage cash flow and save time from manually managing the payment collection process.

We look forward to working with you. Please reach out to us if you have any questions at {{proposal.sender_email }}.

Regards,

{{ proposal.sender_name | default:practice.admin }}
{{ practice.name }}