

PROPOSAL CONFIRMATION FLOW SALES MEMBER CHEAT SHEET



Step 1: Present Preliminary Proposal

Sales Member meets homeowner to present the **Preliminary Proposal**

- Same proposal, new name
- Either instant or manual design

Step 2: Complete Closing Documents

Sales Member helps the homeowner complete **ALL Closing Documents**

- Complete the Virtual Site Survey
- Set expectation on Final Proposal being available within 3 days.

Step 3: Palmetto Site Approval

Within 3 days of needed information being submitted & approved...

Palmetto will upload the **Trued-Up Final Proposal** into Alchemy, including:

- Permit-ready design
- Full scope of work
- Complete project costs

Step 4: Sales Member Notification

Sales member will be **alerted via SMS**

- Final Proposal has been uploaded to Alchemy
- WITH OR WITHOUT CHANGES

Final Proposal - NO Changes

Good News!

You don't have to do anything!

- *If all closing documents have been approved, the project moves forward, same as today*
- **Palmetto Project Coordinator will be assigned to monitor the project & final design plans are auto-sent to homeowner via text/email**

Final Proposal WITH Changes

Think of it as an expedited change order!

- *Homeowner must sign new contracts, reflecting the changes, for the project to move forward*
- **Select & Continue** on Final Proposal & **new documents will auto-send to homeowner's email** for immediate signature