Create A Standard Proposal

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Overview

Proposals describe what you're offering to do for a prospect or a customer. Every proposal contains a single **Service** and zero or more **Parts/Add Ons**. Once you've created a Proposal, you can save it or send it to the contact assuming they have an email address. If not, you can also print it.

This article will review:
- Settings and Navigation
- Start a Proposal
- Configure Settings
- Select a Service and Parts
- Adjust Details
- Save or Send
- Add Attachments
- Additional Settings
- Do it Now
- FAQs

Video Tutorial

Settings and Navigation

Proposal Settings

Configure your master **Proposal Settings** via **Control Panel > Proposals.**

 Make further customizations about proposals in **Service Settings** via **Control Panel > Services > Edit**.

There are general **Notification Settings** for proposals in **Control Panel > Notifications**.

Find User-specific notifications and permissions for proposals. Go to **Control Panel > Users > Edit** and choose either **Permissions** or **Notifications** tabs.

> The ability to edit, view, void Proposals are limited based on **User Roles** and **Permissions**. You may need to contact your Brand Admin for assistance.

Proposal Navigation

Proposals can be created from an appointment (i.e., at the end of an estimate appointment) or from a contact

details page.

Get an overview about proposals in the following locations:
- The Snapshots section of the navigation menu contains several helpful **Grids**
  - Open Proposals
  - Accepted Proposals
  - Projects (if you track proposals as projects)
- Navigate to Reports for proposal-related reporting
  - Open Proposals/Options
  - Proposal Declines
  - Proposal Pivot Grid
  - Proposal Summary
  - Pipeline

Start a Proposal

ServiceMinder offers multiple ways to create proposals, giving your team flexibility to match different workflows. Whether your business prefers to create proposals in advance or build them in the field, ServiceMinder adapts to your process.

For example:
- **Appointment-first flow:** Some businesses prefer to perform an onsite estimate or service and generate the proposal *after* the appointment, based on the work performed.
- **Sales-first flow:** Others prefer to create and accept a proposal *before* scheduling the appointment. The proposal can act as a work order for Service Agents in the field.
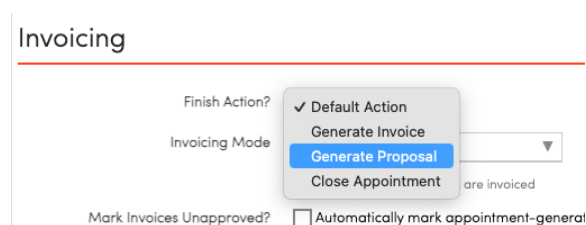
From an Appointment or Service

A common approach is to create a proposal as part of your appointment workflow, either during or after the appointment.

There are two main ways this works:

1. Automatic Proposal Creation on Appointment Completion

In **Control Panel > Services**, you can set the **Finish Action** to **Generate Proposal** on specific services to automatically create a proposal when the appointment is marked as **Finished**.

This is great for services like "Free Estimate" or "Inspection" where your goal is to propose work after the initial visit.

2. Manual Proposal Creation During or After an Appointment

Service Agents or sales team members can build and generate a proposal directly from the appointment via the **Web App** or the **Mobile App**.
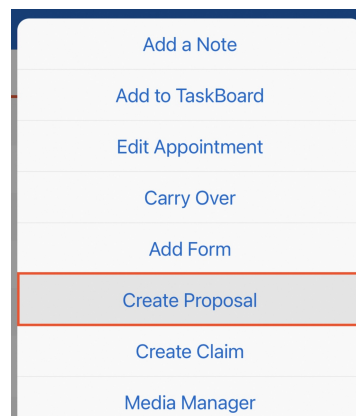
- **In the Web:** View the appointment details page and click **Copy to Proposal** (found beneath the line items).

- **In the App:** View the appointment details page and click the **three dots**. Then choose **Create a Proposal**.
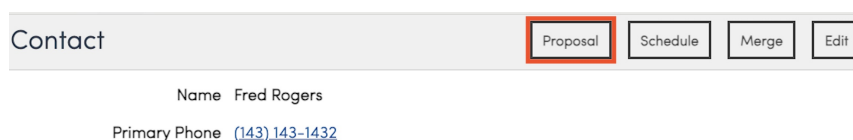

This is useful for creating a formal proposal while onsite, especially when work is being scoped or quoted in real time.

From a Contact

You can also create a proposal at any time from a contact's record:

1. Navigate to the **Contact Details** page.

2. Click the **Proposal** button at the top of the page.

3. Complete the proposal form and send to the customer as needed.

This method is useful for generating a proposal outside the context of a scheduled appointment—such as in response to a phone inquiry, online request, or follow-up.

Configure Settings

Date: will default to today's date, but can be updated manually.

Expires On: determines when this existing offer is no longer available for your prospective customer to accept.

Rescission Days: sets how many days a customer has to change their mind about accepting a proposal.

Title: a display name for this particular proposal. Helpful when sending more than one proposal to a customer, perhaps as part of a bundle. If this is left blank, it will default to the name of the Service on the proposal.

Customer Notes: notes that are visible to the customer on the proposal (i.e., a summary of the work to be done as well as any specific notes or instructions you want the contact to see).

Job Number: this field can be enabled in **Control Panel > Proposals** and is an externally-facing, customizable identifier for jobs, helping with organization, tracking, and communication beyond the system's internal Proposal ID.

Internal Notes: notes that will only be seen by your team, including the service agents who might actually deliver the service.

Settings

Date*	8/7/2025
Expires On*	11/5/2025
Rescission Days	14
Title	Furnace Repair Estimate
Customer Notes	These will display to the customer.
Job Number	12345
Internal Notes	These will be private to just your team.

Select a Service and Parts

To build your proposal, you must first select a Service using the dropdown menu. The Service line controls many settings regarding the proposal, and subsequently any related appointments and invoices.

To save time, you can also use pre-built Proposal Templates to get started. If you have templates built, you can select the template and it will pre-populate the service and part line items for you.

Option	Item	Descriptio
Select a template... ▼	Select a service... ▼	
⋮ ✕ -option-	-part-	Search...

If you are building this proposal manually, the next step will be choosing Parts to add to the project. You can add parts two different ways:

- Click in the box labeled **Part** and search for the name of the part you want to add.
- Click **Search** to narrow down what you're looking for by Part Category. Select a Cateogory and review the list of parts that populates below. Click **Select** to add that part to your proposal.

Adjust Details

Line Items

After selecting a Service or Part, you can have a few additional configuration options:

- **Taxable:** The Taxable box on the service line must be checked in order for the entire proposal to be taxed. Learn more about tax settings.
- **Edit Details:** Use the pencil icon next to any line to adjust details about that item.
- **Quantity:** Adjust how many of the item will be needed for the proposal.
- **Rate:** Adjust the unit cost of the item.
- **Options:** Group parts together into Options that can be accepted or declined as part of the greater proposal. Learn more about options.\
- **Tax Rate:** If you are charging tax on this proposal, make sure a Tax Rate is selected in the dropdown menu below the subtotal.
- **Labor Hours:** Define how many hours of labor it will take to complete this job for the purpose of later scheduling the appointment and calculating hourly rates.
- **Demand:** Sets how much of a service agent's capacity will be taken up by this job (i.e., how many gallons of water will be needed for a pest control visit).

	Option	Item	Description	Quantity	Rate	Amount
	Select a template... ▼	Test Service ▼	Sample description of service.	1	0	$0.00
			☐ Taxable | 🖉			
⊗	-option-	Example Part 1	Example Part 1	2	100	$200.00
			🖉			
⊗	Option 1	Example Part 2	Example Part 2	2	200	$400.00
			🖉			
⊗	-option-	-part-	Search...			

Subtotal		$600.00
Tax	Example State Tax ▼	$51.78
Total		$651.78
Labor Hours	1 hour	
Demand	10	

Communications

- **En Route Notifications:** Choose to send En Route messages via email, text message, or both.
- **Proposal Delivery Method:** Designate email addresses and phone numbers (if you have two-way texting enabled in your organization) to send the proposal to.

Notifications

En Route ☐ Email to beautifulday@bemyneighbor.com
☑ Text message to (143) 143-1432

Please note that an email or text will only be sent automatically if you choose to Send this proposal below. You can always send this proposal manually from the details page.

The email or phone number selected here will also be the default confirmation option when this proposal is scheduled.

Delivery

Email ☑ beautifulday@bemyneighbor.com
☐ [   ]

Text ☐ Text message notifications are only available with the two-way texting feature and a valid phone number.

Please note that an email or text will only be sent automatically if you choose to Send this proposal below. You can always send this proposal manually from the details page.

Save or Send

1. You can **Send** the proposal, meaning you can email it to the customer for review and acceptance. This will also save the proposal.

2. You can **Save** the proposal, meaning you do not email it to the customer yet but have it created and saved in your org.

A newly created Proposal will appear on the **Contact Details** page. Click **Proposals** from the options on the right-hand side, make sure you are on Proposals (not Change Orders), and you will see every proposal created with status, the date, and the option to Edit or Accept.

Add Attachments

After saving the proposal, you can go back and add attachments. Below the proposal total, you will see several options:
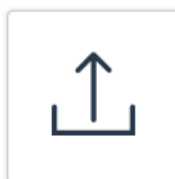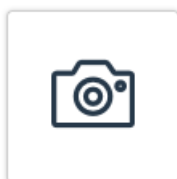

- **Camera Icon:** Upload photos directly to the proposal.

- **Upload Icon:** Upload documents directly to the proposal.
- **Collateral Library:** Choose photos or documents from your organization to add to the proposal. Select the items you want to add, then click Save.
- **Contact:** Choose photos or documents from the contact to add to the proposal. Click the down arrow on the item to pull it onto the proposal, then click Close.

Once photos and/or documents have been added to the proposal, you can manage them in the following ways:
- Click the **X** to remove the item from this proposal.
- Click the **pencil icon** to add a **note** to the item or to mark it as **internal** (hidden from the contact).
- Click the **magnifying glass** icon to enlarge the view of the picture.
- Click the **document icon** to download a preview of the PDF.
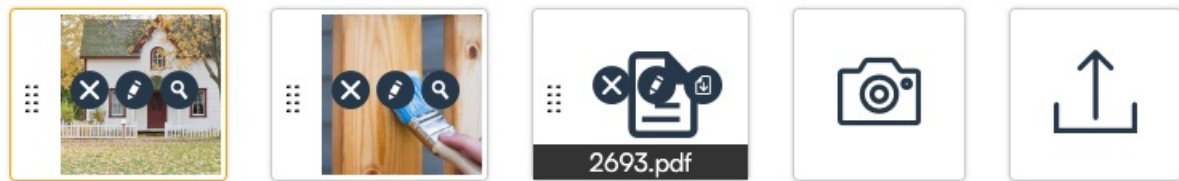
Additional Settings

At the top of the proposals details page, you'll find a **Settings** button that allows you to control certain master settings for this individual proposal. These settings are typically determined in the Control Panel at the Service or Proposal level, but they can be overridden here for special circumstances.
- **Track as Project:** Useful for tracking the completion of proposals that will require multiple appointments over the course of several days.
- **Invoicing Mode:** Changes if and when an invoice is automatically generated.
- **Summarize Pricing:** Moves all pricing to the Service or Option lines, effectively obscuring the price of individual line items and presenting a larger sum.
- **Extra Signature:** Allow for a second signature to be taken when the proposal is accepted.
- **Target Date:** Helps you budget your time by setting a date that you want to complete this appointment.

Do it Now (Mobile App)

If you are out in the field creating a proposal in the mobile app, the **Do It Now** option allows you to immediately start an appointment from the proposal so you can get to work right away. Create the proposal and save it. Then select the three dots in the top right corner and choose Do It Now.

| Accept |
| Schedule |
| Do It Now |
| Invoice |
| Add Appointment |
| Add Form |
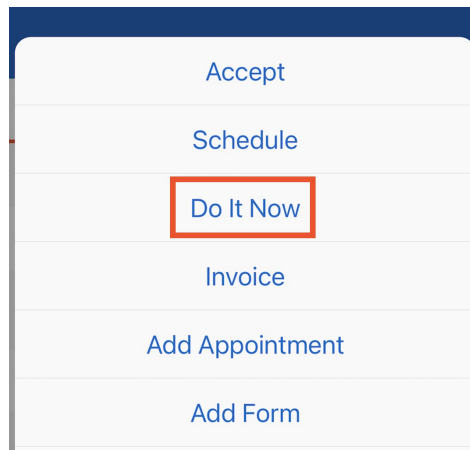
You have to turn this feature on by going to **Control Panel > Proposals > Settings**.

Do It Now   ⬤ Enable Do It Now action in app

FAQs

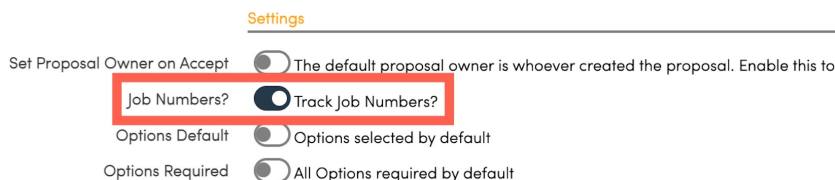### Why do my proposal show blank boxes where rates should be?

This is typically caused by the **Summarize Pricing** setting in **Control Panel > Proposals** and scroll to the Presentation section. Although this setting may be turned off now, Proposals that were created before that setting was turned off, still retain their original attributes and settings. You can turn these off per Proposal via the **Settings** button at the top of the proposal.

How can I display a proposal number for my customers?

By default SM has Proposal ID numbers that generate automatically and that is the ID number shown on your proposals. Typically, these are for internal use and are not seen by the customer. If you go to **Control Panel > General > Basic Info**, you can select to **Show IDs**. The ID will then appear on new proposals created.

Show IDs? ☐ Show contact, proposal, and appointment IDs on their respective details pages.

Another option is to use **Job Numbers**. Job Number Tracking is enabled in **Control Panel > Proposals > Settings**. They are for external use and can be entered when creating the proposal.

Settings

Set Proposal Owner on Accept	⬤ The default proposal owner is whoever created the proposal. Enable this to
Job Numbers?	⬤ Track Job Numbers?
Options Default	⬤ Options selected by default
Options Required	⬤ All Options required by default

Both Proposal ID and Job Number can be reviewed on the proposal details page.

Proposal

Decline	View	Print	Edit	Settings	Unsubscribe	Delete	Timeline

Brooke Trout ✎
186 Fleet Street
Austin, TX 78748
(666) 666-6666
■ South Austin
Delivery Email to brooketrout@fakeemail.com
Confirmation Email to brooketrout@fakeemail.com
En Route
Copy Link...

Status Open
ID 37719889
Job Number 1234
Owner Test User ✎
Proposal Date 8/5/2024
Expires On 11/3/2024
Rescission Days 14
Next Reminder None
Duration 30 mins

How do I update a work order if I can't edit an accepted proposal?

Instead of directly editing the accepted proposal, you can use a **Change Order** to:

- Add or remove line items (negative quantity removes).
- Accept the change order.
- Merge the invoices to reflect the updated details.