

# Create A Standard Proposal

04/15/2025 2:04 pm CDT

## 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](#)
- [Creating a Proposal](#)
- [Adding Notes](#)
- [Selecting a Service](#)
- [Adding Photos](#)
- [Save or Send](#)
- [Do it Now \(Mobile App\)](#)
- [FAQs](#)

## Video Tutorial

### Settings and Navigation

There are settings attached to proposals via **Control Panel > Proposals** and at the service-level (**Control Panel > Services > Edit**).

There are general notification settings for proposals in **Control Panel > Notifications**.

There are 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.

### Creating a Proposal

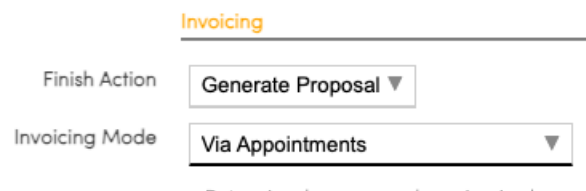
There are several ways to create a proposal. This allows for flexibility of industry and business workflow. For instance, some may schedule an appointment first then create a proposal based on the work done, and have the customer sign in-person.

Others may want to have a proposal created and accepted, then schedule an appointment from the proposal itself

to use the line items as a work order for the techs in the field. The Service Agent(s) complete the work order, then the office admin or owner creates an invoice from that proposal to receive full payment of the service.

## From A Service

A common method is to automatically create a new Proposal when you **Finish an Appointment**. You may have an Estimate service and you can set the **Default Action** for that to create a new proposal. So whenever you mark an Estimate appointment Finished, you'll have a chance to create a new Proposal.



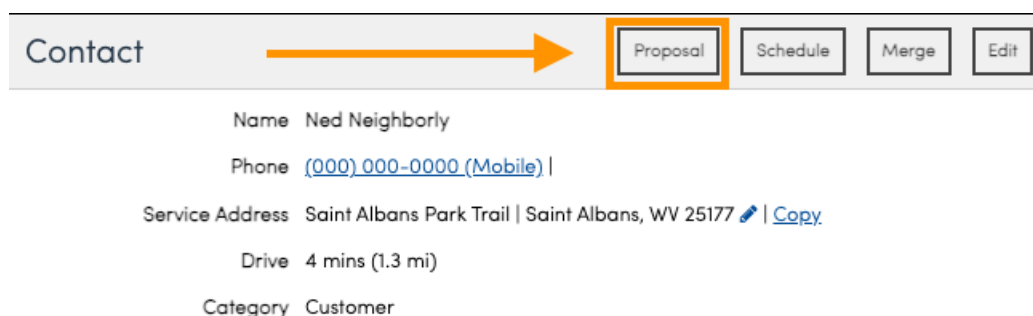
The image shows a settings panel titled "Invoicing". It contains two dropdown menus. The first is labeled "Finish Action" and is set to "Generate Proposal". The second is labeled "Invoicing Mode" and is set to "Via Appointments".

Learn more about Finish Actions in the help article, [Service Settings: Invoicing Mode](#). You can set these PER SERVICE, or leave the settings default.

For instance, one service may generate a proposal automatically. A second Service may just close the appointment because it is a free estimate and you don't need to collect payment.

## From A Contact

You can also create a proposal from the **Contact Details** page. Just find the contact, then click the **Proposal** button to create a new proposal for that contact.



The image shows a contact details page for "Ned Neighborly". At the top, there is a "Contact" header with a right-pointing arrow. Below the header is a row of action buttons: "Proposal", "Schedule", "Merge", and "Edit". The "Proposal" button is highlighted with an orange border. Below the buttons, the contact information is displayed: Name: Ned Neighborly, Phone: (000) 000-0000 (Mobile), Service Address: Saint Albans Park Trail | Saint Albans, WV 25177, Drive: 4 mins (1.3 mi), and Category: Customer.

## From An Appointment

Some businesses will want their service agents/salespeople to build a proposal "on site" during the appointment, and then create an official proposal from that appointment. If this process sounds familiar for your business, then know that you can also *appointment into a proposal* on both the Mobile App and on the Web App.

## Schedule an Appointment

Find the Contact

Enter a portion of the name or address

Matching Contacts

- Ned Neighborly
- Saint Albans Park Trail | Saint Albans, WV 25177
- Customer

## Adding Notes

There are two inputs for notes at the top of the proposal creation dialog. The **Customer Notes** section will be included in the online or printed proposals. You can include a summary of the work to be done as well as any specific notes or instructions you want the contact to see.

The **Internal Notes** section will only be seen by your team, including the service agents who might actually deliver the service.

### Schedule an Appointment

Contact Ned Neighborly  
Saint Albans Park Trail | Saint Albans, WV 25177  
Pri (000) 000-0000 (Mobile)  
 Customer

Customer Notes  [Import...](#)

Internal Notes

Flash Message

Option	Item	Description
<input type="text" value="Select a template..."/>	<input type="text" value="Ghost Removal"/>	<input type="text" value="Irreconci"/>

The **Flash Message** will show as a brightly colored banner at the top of the **Appointment**.

## Selecting A Service

The first input for a proposal is the Service that you'll be providing. The name for the service is how the Proposal will be referred to within serviceminder as well as in the email notifications to the contact about the Proposal.

You can use pre-built [Proposal Templates](#) to get started.

[Import...](#)

Option	Item	Description	Quantity	Rate	Amount	
Service	Ghost Removal	Irreconcilable differences between spirit and	1	0	\$0.00	
				<a href="#">Edit</a>		
⋮	5 Year Warranty	Ghost Repellant - 5 Year	5 year warranty on ghost repellant	1	235	\$235.00
⋮	-option-	-part-	<a href="#">Search...</a>			
Subtotal					\$0.00	
Tax					\$0.00	
Total					\$0.00	

Optional

## Detail Lines

Once you select the Service, the first line will populate with the Service and the service description. You can overwrite or edit this text as needed for the Proposal. You can then change/set the pricing for this line.

To add detail lines, just start typing in the Part column. As you type, matching parts will be shown and you can select the one you want. You can also change the description field as needed. Enter in the quantity and change the unit price if you need to. New lines will automatically be added at the bottom as you select parts on the existing lines. If you need to delete a detail line, just click the X on that line.

Lastly, you can also enter internal notes that are specific to a line. Click on the pencil below the description and a dialog box will be shown so you can edit both the Description and the line's Internal Notes.

If you need to change the order of your lines, just click and drag the line to where you want it to go. Only the first line for the Service is fixed. All the other Detail lines can be moved around. So if you add a new line, you can then drag it up to where you want it after you've added it. Use the dots icon to drag and drop lines on the proposal. This also works on the calendar when moving agents on the schedule.

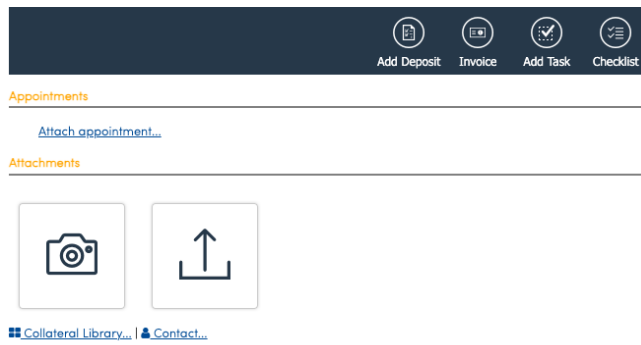
Option	Item	Description	Quantity	Rate	Amount	
Select a template...	Test Service	Sample description of service.	1	0	\$0.00	
				<input type="checkbox"/> Taxable		
⋮	-option-	Example Part 1	Example Part 1	3	150	\$450.00
⋮	-option-	Example Part 2	Example Part 2	1	225	\$225.00
⋮	-option-	-part-	<a href="#">Search...</a>			
Subtotal					\$675.00	
Tax					\$0.00	
Total					\$675.00	
Labor Hours					30 minutes	

## Adding Photos

There are two ways to add photos - either on the **Proposal** directly or copying photos stored on the **Contact Details** page.

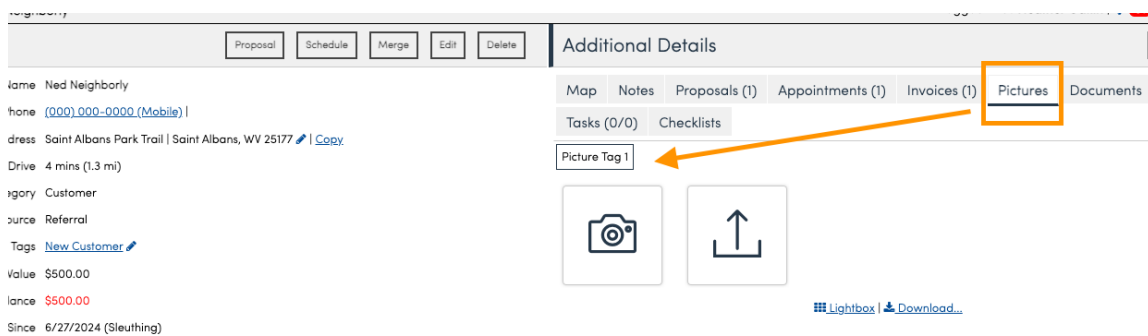
### On a Proposal

You can add Pictures after creating the Proposal. Scroll to the bottom of the proposal (after you **Save** it). There is a section called **Attachments**, and you can upload or choose from your photo library.



## Contact Details Page

Pictures uploaded through the Contact page can be tied to proposals, or you can upload new pictures.



You can define picture tags to tag pictures. Like contact tags, you'll need to define the tags you want to use ahead of time by going to **Control Panel > Categories, Tags and Labels**.

Once defined, you can tag pictures from the picture viewer on contacts and appointments. Just check the box for each tag you want to apply and they will save automatically. Tags may also be applied when pictures are taken in the app.

You can also filter by tags using Lightbox with the new **Picture Tags** term.



Notes can be attached to images tied to proposals by clicking the pencil icon. These notes will appear when the image is opened as a caption.

## 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 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.

Contact: Ned Neighborly  
 Phone: (000) 000-0000 (Mobile)  
 Service Address: Saint Albans Park Trail | Saint Albans, WV 25177 | [Copy](#)  
 Drive: 4 mins (1.3 mi)  
 Category: Customer  
 Lead Source: Referral  
 Tags: [New Customer](#)  
 Lifetime Value: \$500.00

Additional Details: [Proposals \(1\)](#) | [Appointments \(1\)](#) | [Invoices \(1\)](#) | [Pictures](#) | [Documents](#)

Tasks (0/0) | Checklists

Proposals  Change Orders

Page 1 of 1 (1 items)

#	Date	Service	Status	Title	Total	Owner
<a href="#">Accept</a>   <a href="#">Edit</a>	6/27/2024	<a href="#">Honeybadger Removal</a>	Open	Honeybadger Removal	\$210.00	Heather Gatlin



An Accepted Proposal cannot be edited. You will need to **Clear the Acceptance** to edit the proposal.

## Do It Now (Mobile App)

In the serviceminder Mobile App, you create a proposal on site, then have the Contact accept in-person. The **Do It Now** option allows you to get written confirmation, then do the work right then and there. Effectively, getting multiple steps done all at once.

You have to turn this feature on by going to **Control Panel > Proposals > Do It Now**.

Settings

- Set Proposal Owner on Accept  The default proposal owner is whoever created the proposal. Enable this to overwrite
- Job Numbers?  Track Job Numbers?
- Options Default  Options selected by default
- Options Required  All Options required by default
- Long Line Descriptions  Allow line descriptions up to 2048 characters. This may cause long descriptions to be t
- Extra Signature  Allow for an extra signature to be taken on proposals
- Deposits Before Acceptance  Allow deposits when proposal is not yet accepted
- Do It Now**  Enable Do It Now action in app
- Hide Proposals From Accepted Bundle  Hides unaccepted proposals in a bundle from the contact once they've accepted one

## 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.

Proposal

[Accept](#) [Decline](#) [Schedule](#) [View](#) [Print](#) [Edit](#) [Settings](#)

### 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**, 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**. They are for external use and can be entered when creating the proposal.

The image shows two screenshots. The top one is the 'Settings' page with a red box around the 'Job Numbers?' and 'Track Job Numbers?' options. The bottom one is a 'Proposal' details page with a red box around the 'Status Open', 'ID 37719889', and 'Job Number 1234' information.

**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

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**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?

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.