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:

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.

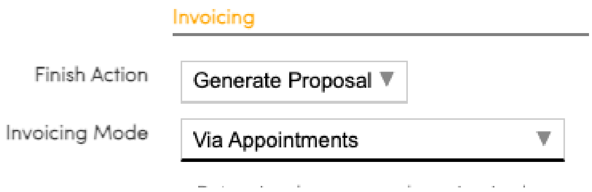
Creating a Proposal

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.

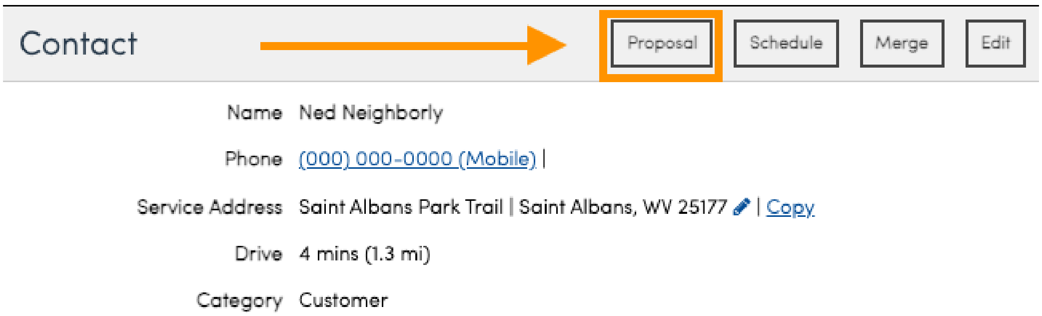


Learn more about Finish Actions in the help article, Service Settings: Invoicing Mode. You can set these PER SERVICE, or leave the settings default.

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.

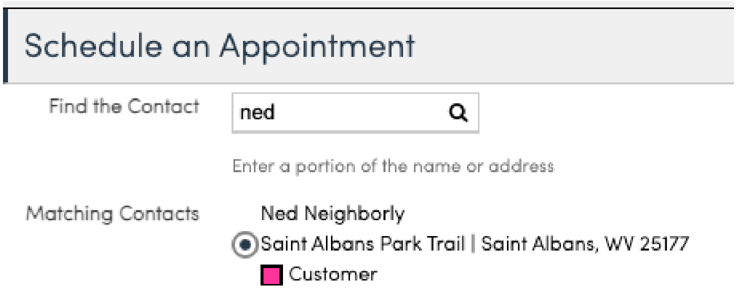
From A Contact

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.



From An Appointment

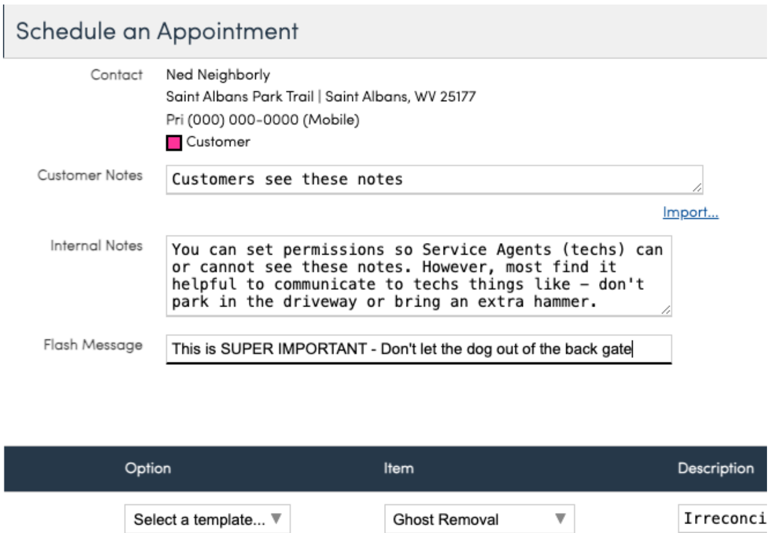
Some businesses will want their service agents/salespeople to build a proposal "on site" during the appointment, and then create an official proposal from that appointment. If this process sounds familiar for your business, then know that you can also *appointment into a proposal* on both the Mobile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



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.

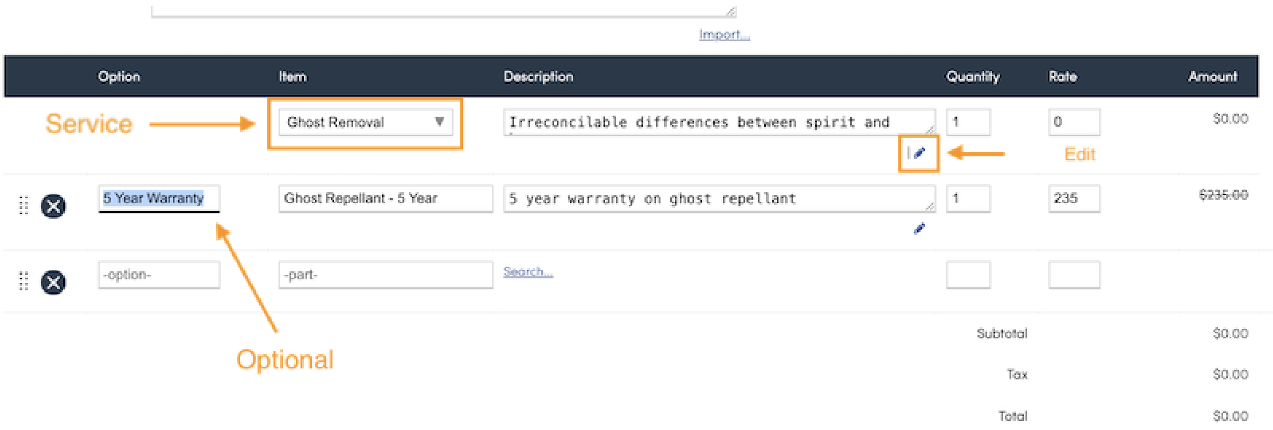


The **Flash Message** will show as a brightly colored banner at the top of the **Appointment**.

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 service**minder** as well as in the email notifications to the contact about the Proposal.

You can use pre-built Proposal Templates to get started.



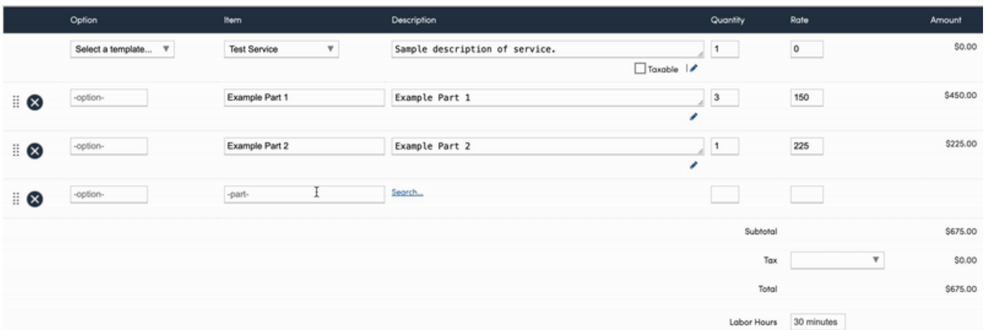
Detail Lines

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.

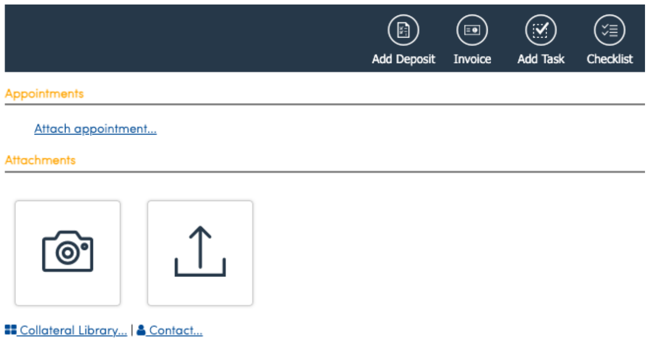


Adding Photos

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

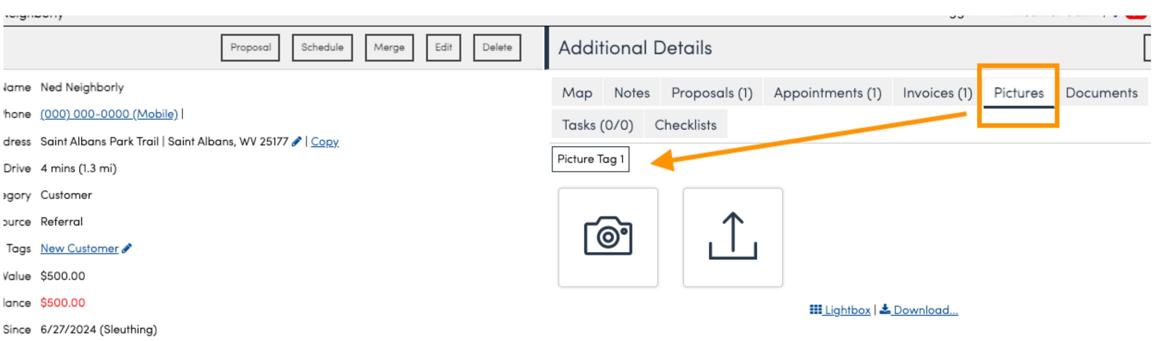
On a Proposal

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.

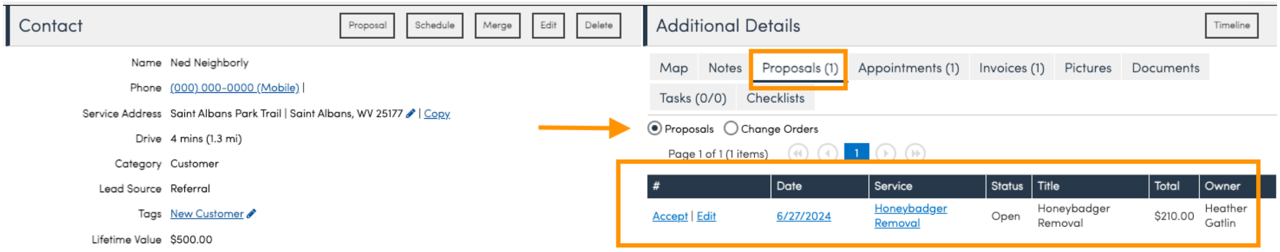
> Notes can be attached to images tied to proposals by clicking the pencil icon. These notes will appear when the image is opened as a caption.

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.

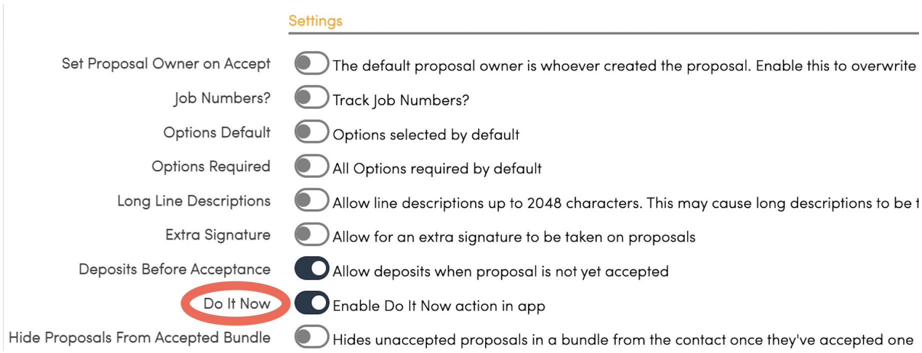


An **Accepted Proposal** cannot be edited. You will need to **Clear the Acceptance** to edit the proposal.

Do It Now (Mobile App)

In the service**minder** Moble 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**.



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.

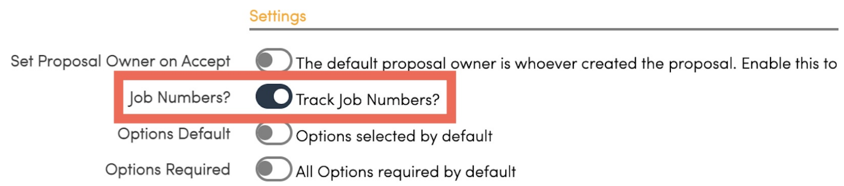
Although this setting may be turned off now, Proposals that were created before that setting was turned off, still retain their original attributes and settings.

You can turn these off per Proposal via the **Settings** button.

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.

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.



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.