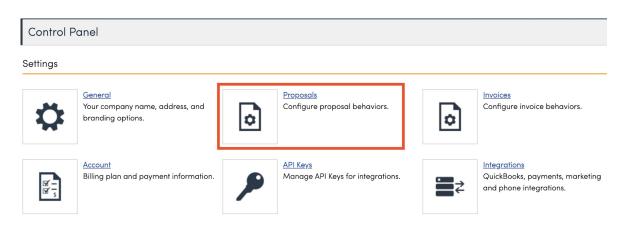
About Proposals Settings

08/07/2025 3:19 pm CDT

Overview

This article outlines key settings that impact every proposal you send to contacts. To control master settings for all proposals, navigate to **Control Panel > Proposals**.



This article will review:

- General Settings
- Rescission
- Completion Mode
- Presentation
- Communications
- Other Settings
- Individual Proposal Settings

General Settings

| | Settings |
|-------------------------------------|---|
| Set Proposal Owner on Accept | The default proposal owner is whoever created the proposal. Enable this to overwrite that owner with the user who accepts the proposal |
| 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 truncated when synchronizing invoices with other systems. |
| 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 |
| Labor Budget Rate | |
| | Labor rate for calculating proposal margins |

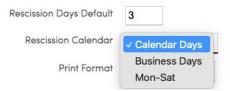
| Setting | Details |
|------------------------------|---|
| Sat Dranacal Owner on Assent | This setting only applies if you have services that allow internal proposal |
| Set Proposal Owner on Accept | acceptance (where a user can accept on behalf of a customer) |

| Setting | Details |
|------------------------------|--|
| Job Numbers | Utilize this feature if you need to assign a unique number to each job that is different from the Proposal ID. A new field will display when editing the |
| | proposal details where you can manually type a Job Number. |
| | If you add optional line items to proposals, toggling this on will cause them |
| Options Default | to be pre-selected by default for the customer. They will have to manually |
| | deselect them if they don't want to accept the options. |
| | If you add optional line items to proposals, toggling this on will cause them to be required in order to accept the proposal. The checkbox to |
| Options Required | accept/decline the option will not appear. This is most useful if you want to |
| | use the Options feature to cluster line items together in groups, but don't |
| | want the customer to be able to decline them on the proposal. |
| Long Line Descriptions | Turn this on if you are running out of room in the description fields on your proposals. |
| Extra Signature | Two signature boxes will appear on proposals. Only one is required to |
| Extra Signature | accept the proposal. |
| Deposits Before Acceptance | Allow a deposit to be made without Accepting the proposal. |
| Do It Now | In the app, when you create a proposal on site, the customer can accept it in person and you can do the work right then and there. |
| | This setting can help eliminate confusion by hiding the unaccepted |
| Hide Proposals from Accepted | proposal options after a customer accepts one bundled option. |
| Bundle | Alternatively, you can allow them to see those other options if you hope to |
| | upsell them to those items later. |
| | This rate can help you calculate how much a job will cost you in hourly |
| Labor Budget Rate | labor for the purpose of profit margins. Enter the average hourly rate of |
| | your technicians. |
| Print Format | Choose whether or not the proposal will print as the web view or as a PDF |
| THILL OTHIAL | template (configured in Control Panel > Print Templates). |

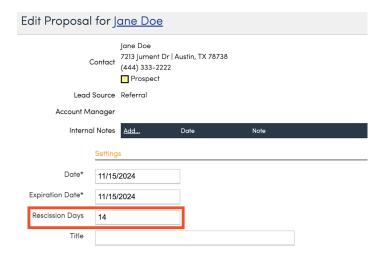
Rescission

The cancellation of a contract and the return of the parties to the positions they would have had if the contract had not been made. Once the proposal has been accepted the customer has a certain amount of time to rescind the proposal without penalty.

The default **Rescission** setting lives under **Control Panel > Proposals**. If rescission days are left blank when writing the proposal, the link for the Rescission Terms will not show at the bottom of the proposal.



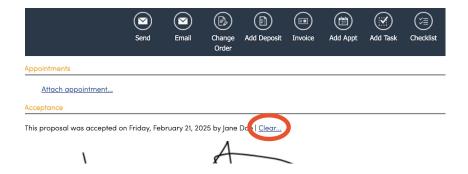
You can alter the rescission days on individual proposals if you have a special case.



To set the Rescission terminology, go to Control Panel > Miscellaneous Templates > Proposal Rescission

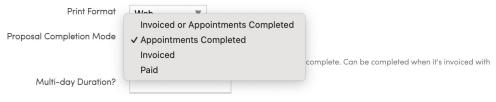


A rescission can be cleared internally by viewing the proposal and scrolling to the bottom of the page. Find the section titled Declined and click on "Clear" to the right of the details. Then viewing the proposal again and clearing the Acceptance.



Completion Mode

The setting for **Proposal Completion Mode** has 4 options. This controls when a **Proposal** is marked as **Completed**.



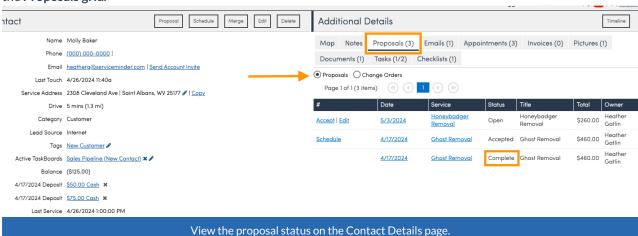
For multi-day scheduling, the default appointment duration

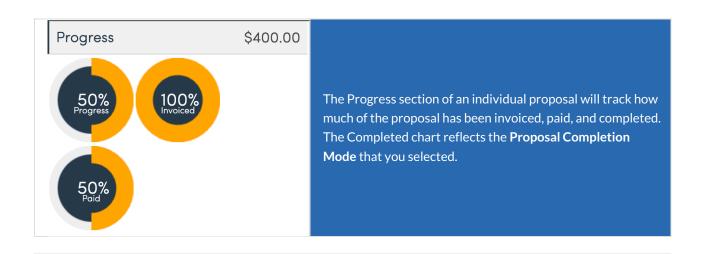


Need to change the Completion Mode for a single proposal? You can adjust this and several other options by viewing the proposal details page and clicking **Settings**. See the section **Individual Proposal Settings** below for more information.

You can refer to the status of a proposal on the Contact Details Page, in the Progress section of the proposal, or in

the Proposals grid.





Presentation

Here are a few examples of how settings in this section impact the information displayed on your proposals.

Setting What it looks like...

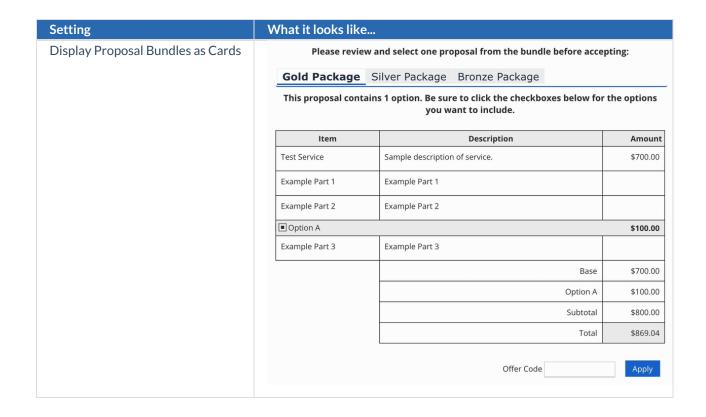
| Setting | What it looks lik | (e | | |
|-------------------|---|--------------------------------|-----------|----------|
| Summarize Pricing | This proposal contains 1 option. Be sure to click the checkboxes below for the options you want to include. | | | |
| | Item | Description | Rate | Amount |
| | Test Service | Sample description of service. | 100.00 | \$100.00 |
| | Example Part 1 | Example Part 1 | 100.00 | \$200.00 |
| | Example Part 2 | Example Part 2 | 200.00 | \$400.00 |
| | Option A | | | \$100.00 |
| | Example Part 3 | Example Part 3 | 50.00 | \$100.00 |
| | | | Base | \$700.00 |
| | | | Option A | \$100.00 |
| | | | Subtotal | \$800.00 |
| | | | Tax | \$69.04 |
| | | | Total | \$869.04 |
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| Setting | What it looks | like | | | |
|--------------------|----------------|---|------------|---------------|-----------|
| Blank Zero Amounts | This proposal | contains 1 option. Be sure to click the you want to includ | | below for the | e options |
| | Item | Description | Qty | Rate | Amount |
| | Test Service | Sample description of service. | 1 | 0.00 | \$0.00 |
| | Example Part 1 | Example Part 1 | 2 | 0.00 | \$0.00 |
| | Example Part 2 | Example Part 2 | 2 | 200.00 | \$400.00 |
| | ■ Option A | | | 1 | \$100.00 |
| | Example Part 3 | Example Part 3 | 2 | 50.00 | \$100.00 |
| | | | | Base | \$400.00 |
| | | | | Option A | \$100.00 |
| | | | | Subtotal | \$500.00 |
| | | | | Tax | \$43.15 |
| | | | | Total | \$543.15 |
| | | | Sff C I- | | Annala |
| | | | Offer Code | | Apply |
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| | Accep | t Decline Request Change | es Print | Forward | |
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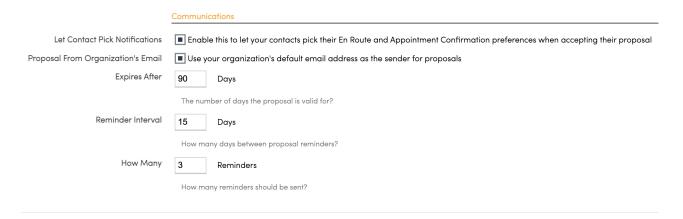
| etting | What it looks I | | | | |
|---------------|------------------|---|----------|---------------|----------|
| lide Quantity | This proposal co | ontains 1 option. Be sure to click th you want to includ | | oelow for the | options |
| | Item | Description | Qty | Rate | Amoun |
| | Test Service | Sample description of service. | 1 | 100.00 | \$100.00 |
| | Example Part 1 | Example Part 1 | 2 | 100.00 | \$200.00 |
| | Example Part 2 | Example Part 2 | 2 | 200.00 | \$400.00 |
| | Option A | | | | \$100.00 |
| | Example Part 3 | Example Part 3 | 2 | 50.00 | \$100.00 |
| | | | | Base | \$700.00 |
| | | | | Option A | \$100.00 |
| | | | | Subtotal | \$800.00 |
| | | | | Tax | \$69.04 |
| | | | | Total | \$869.04 |
| | Accept | Decline Request Change | es Print | Forward | |
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| tting | What it looks I | ike | | | |
|---------------|------------------|--|---------|--------------|----------|
| de Unit Price | This proposal co | ontains 1 option. Be sure to click the c you want to include. | | elow for the | options |
| | Item | Description | Qty | Rate | Amoun |
| | Test Service | Sample description of service. | 1 | 100.00 | \$100.00 |
| | Example Part 1 | Example Part 1 | 2 | 100.00 | \$200.00 |
| | Example Part 2 | Example Part 2 | 2 | 200.00 | \$400.00 |
| | ■ Option A | | | | \$100.00 |
| | Example Part 3 | Example Part 3 | 2 | 50.00 | \$100.00 |
| | | | | Base | \$700.00 |
| | | | | Option A | \$100.00 |
| | | | | Subtotal | \$800.00 |
| | | | | Tax | \$69.04 |
| | | | | Total | \$869.04 |
| | | | | | |
| | | Off | er Code | | Apply |
| | | Off | er Code | Total | |
| | Accept | Decline Request Changes | Print | Forward | |
| | | | | | |

| Setting | What it looks like | e | | | |
|---------------------------|---|--------------------------------------|----------|--|--|
| Hide Parts | This proposal contains 1 option. Be sure to click the checkboxes below for the options you want to include. | | | | |
| | Item | Description | Amount | | |
| | Test Service | Sample description of service. | \$600.00 | | |
| | Example Part 1 | Example Part 1 | | | |
| | Example Part 2 | Example Part 2 | | | |
| | Option A | | \$100.00 | | |
| | Example Part 3 | Example Part 3 | | | |
| | | Base | \$600.00 | | |
| | | Option A | \$100.00 | | |
| | | Subtotal | \$700.00 | | |
| | | Тах | \$60.41 | | |
| | | Total | \$760.41 | | |
| | | | | | |
| | | Offer Code | Apply | | |
| | Accept | Decline Request Changes Print Forwar | d | | |
| | | | | | |
| Move Tax to Terms Section | | Base | \$700.00 | | |
| | | Option A | \$100.00 | | |
| | | Subtotal | \$800.00 | | |
| | | Тах | \$69.04 | | |
| | | Total | \$869.04 | | |
| | | Offer Code | Apply | | |
| | | TERMS AND CONDITIONS | | | |
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Communications

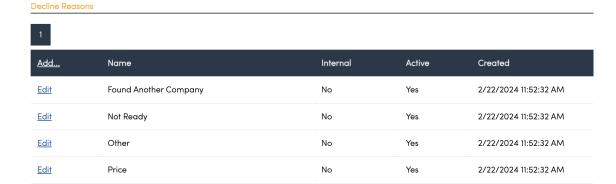


Other Settings

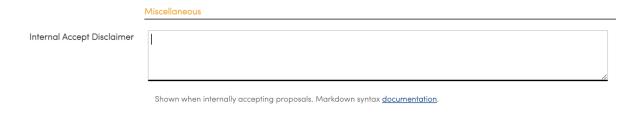
Payments and Deposits - set a universal deposit amount for proposals.



Decline Reasons - set various reason that contacts can select when declining a proposal. Review statistics in the Proposal Declines report.



Internal Accept Disclaimer - text that displays internally to users who are accepting a proposal on a customer's behalf.



Individual Proposal Settings



These are the following proposal settings you can configure at the individual proposal level:

- Track as project: Learn more about Project-Based Business Flow here
- Invoicing Mode: You may need to change the invoicing mode for a specific client who needs to pay earlier or later than your usual workflow (i.e., is using an insurance policy to pay or needs to pay in installments rather than all at once)
- **Summarize Pricing:** Hide the individual cost of each line item and summarize the pricing at the service line or option level.
- Extra Signature: Enable this if two parties need to sign the proposal.
- Target Date: This tool helps plan when a project is expected to be done to ensure you have all the materials you need on hand. It applies to the Resource Planning report.