

About Proposals Settings


02/21/2025 5:22 pm CST


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**.


Control Panel


Settings


[General](#)
Your company name, address, and branding options.

[Proposals](#)
Configure proposal behaviors.

[Invoices](#)
Configure invoice behaviors.

[Account](#)
Billing plan and payment information.

[API Keys](#)
Manage API Keys for integrations.

[Integrations](#)
QuickBooks, payments, marketing and phone integrations.

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

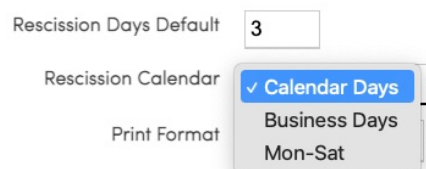
Setting	Details
Set Proposal Owner on Accept	This setting only applies if you have services that allow internal proposal acceptance (where a user can accept on behalf of a customer).

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.
Options Default	If you add optional line items to proposals, toggling this on will cause them 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.
Options Required	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 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 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.
Hide Proposals from Accepted Bundle	This setting can help eliminate confusion by hiding the unaccepted proposal options after a customer accepts one bundled option. Alternatively, you can allow them to see those other options if you hope to upsell them to those items later.
Labor Budget Rate	This rate can help you calculate how much a job will cost you in hourly labor for the purpose of profit margins. Enter the average hourly rate of your technicians.

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.

Edit Proposal for [Jane Doe](#)

Jane Doe
7213 Jument Dr | Austin, TX 78738
(444) 333-2222
Prospect

Lead Source Referral
Account Manager
Internal Notes

Add...
Date
Note

Settings

Date* 11/15/2024
Expiration Date* 11/15/2024
Rescission Days 14
Title

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

Miscellaneous Templates

Appointment Report
Subcontractor Agreement
Proposal Rescission
Proposal Walkthrough

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.

Send
Email
Change Order
Add Deposit
Invoice
Add Appt
Add Task
Checklist

Appointments

Attach appointment...

Acceptance

This proposal was accepted on Friday, February 21, 2025 by Jane Doe | **Clear...**

Completion Mode

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

Print Format Web

Proposal Completion Mode

Invoiced or Appointments Completed
✓ Appointments Completed
Invoiced
Paid

complete. Can be completed when it's invoiced with

Multi-day Duration?

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.

contact

Proposal

Schedule

Merge

Edit

Delete

Name

Molly Baker

Phone

(000) 000-0000

Email

heatherg@serviceminder.com

Last Touch

4/26/2024 11:40a

Service Address

2308 Cleveland Ave | Saint Albans, WV 25177

Drive

5 mins (1.3 mi)

Category

Customer

Lead Source

Internet

Tags

New Customer

Active TaskBoards

Sales Pipeline (New Contact)

Balance

(\$125.00)

4/17/2024 Deposit

\$50.00 Cash

4/17/2024 Deposit

\$75.00 Cash

Last Service

4/26/2024 1:00:00 PM

Additional Details

Map

Notes

Proposals (3)

Emails (1)

Appointments (3)

Invoices (0)

Pictures (1)

Documents (1)

Tasks (1/2)

Checklists (1)

Proposals

Change Orders

Page 1 of 1 (3 items)

1

#	Date	Service	Status	Title	Total	Owner
Accept Edit	5/3/2024	Honeybadger Removal	Open	Honeybadger Removal	\$260.00	Heather Gatlin
Schedule	4/17/2024	Ghost Removal	Accepted	Ghost Removal	\$460.00	Heather Gatlin
	4/17/2024	Ghost Removal	Complete	Ghost Removal	\$460.00	Heather Gatlin

View the proposal status on the Contact Details page.

Progress

\$400.00

50% Progress

100% Invoiced

50% Paid

The Progress section of an individual proposal will track how much of the proposal has been invoiced, paid, and completed. The Completed chart reflects the **Proposal Completion Mode** that you selected.

Presentation

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

Setting	What it looks like...
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Setting

Summarize Pricing

What it looks like...

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
<input checked="" type="checkbox"/> 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

Offer Code

Apply

Accept

Decline

Request Changes

Print

Forward

Setting

Blank Zero Amounts

What it looks like...

This proposal contains 1 option. Be sure to click the checkboxes below for the options you want to include.

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
<input checked="" type="checkbox"/> Option A				\$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

Offer Code

Apply

Accept

Decline

Request Changes

Print

Forward

Setting

Hide Quantity

What it looks like...

This proposal contains 1 option. Be sure to click the checkboxes below for the options you want to include.

Item	Description	Qty	Rate	Amount
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
<input checked="" type="checkbox"/> 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

Offer Code

Apply

Accept

Decline

Request Changes

Print

Forward

Setting

Hide Unit Price

What it looks like...

This proposal contains 1 option. Be sure to click the checkboxes below for the options you want to include.

Item	Description	Qty	Rate	Amount
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
<input checked="" type="checkbox"/> 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

Offer Code Apply

Accept

Decline

Request Changes

Print

Forward

Setting

Hide Parts

What it looks like...

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	
<input checked="" type="checkbox"/> Option A		\$100.00
Example Part 3	Example Part 3	
	Base	\$600.00
	Option A	\$100.00
	Subtotal	\$700.00
	Tax	\$60.41
	Total	\$760.41

Offer Code

Apply

Accept

Decline

Request Changes

Print

Forward

Move Tax to Terms Section

	Base	\$700.00
	Option A	\$100.00
	Subtotal	\$800.00
	Tax	\$69.04
	Total	\$869.04

Offer Code

Apply

TERMS AND CONDITIONS

Setting

What it looks like...

Display Proposal Bundles as Cards

Please review and select one proposal from the bundle before accepting:

Gold Package Silver Package Bronze Package

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.	\$700.00
Example Part 1	Example Part 1	
Example Part 2	Example Part 2	
<input checked="" type="checkbox"/> Option A		\$100.00
Example Part 3	Example Part 3	
	Base	\$700.00
	Option A	\$100.00
	Subtotal	\$800.00
	Total	\$869.04

Offer Code

Apply

Communications

Communications

- Let Contact Pick Notifications ☒ Enable this to let your contacts pick their En Route and Appointment Confirmation preferences when accepting their proposal
- Proposal From Organization's Email ☒ Use your organization's default email address as the sender for proposals
- Expires After Days
The number of days the proposal is valid for?
- Reminder Interval Days
How many days between proposal reminders?
- How Many Reminders
How many reminders should be sent?

Other Settings

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

Payments and Deposits

Proposal Deposit %

Enter a percentage if you require a deposit on accepted proposal

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

Decline Reasons

1

Add...	Name	Internal	Active	Created
Edit	Found Another Company	No	Yes	2/22/2024 11:52:32 AM
Edit	Not Ready	No	Yes	2/22/2024 11:52:32 AM
Edit	Other	No	Yes	2/22/2024 11:52:32 AM
Edit	Price	No	Yes	2/22/2024 11:52:32 AM

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

Miscellaneous

Internal Accept Disclaimer

Shown when internally accepting proposals. Markdown syntax [documentation](#).

Individual Proposal Settings

Proposal Settings

Project?☐ Track as project

Invoicing Mode

Manual

Summarize Pricing☒ Summarize pricing

Extra Signature☐ Allow for an extra signature to be taken when the contact accepts this proposal online

Target Date

Save

Cancel

Proposal

Decline

View

Print

Edit

Settings

Unsubscribe

Delete

Timeline

Progress

\$700.00

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.