About Proposals Settings

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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

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.
Print Format	Choose whether or not the proposal will print as the web view or as a PDF 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 Mod**e has 4 options. This controls when a **Proposal** is marked as **Completed**.

ℹ️ 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.**

View the proposal status on the Contact Details page.

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...

Setting	What it looks like...
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

Offer Code [＿＿＿＿] **Apply**

Accept **Decline** **Request Changes** **Print** **Forward**

Setting	What it looks like...
Blank Zero Amounts	**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
▣ 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	What it looks like...
Hide Quantity	**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
▣ 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	What it looks like...
Hide Unit Price	**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
☑ 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	What it looks like...
Hide Parts	**This proposal contains 1 option. Be sure to click the checkboxes below for the options you want to include.** <table><tr><th>Item</th><th>Description</th><th>Amount</th></tr><tr><td>Test Service</td><td>Sample description of service.</td><td>$600.00</td></tr><tr><td>Example Part 1</td><td>Example Part 1</td><td></td></tr><tr><td>Example Part 2</td><td>Example Part 2</td><td></td></tr><tr><td>☑ Option A</td><td></td><td>**$100.00**</td></tr><tr><td>Example Part 3</td><td>Example Part 3</td><td></td></tr></table> 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 **T E R M S A N D C O N D I T I O N S**

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	
▣ 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	[90] Days
	The number of days the proposal is valid for?
Reminder Interval	[15] Days
	How many days between proposal reminders?
How Many	[3] 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.

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.