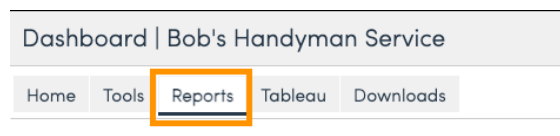# Proposal Reporting

07/23/2025 11:06 am CDT

Overview

This page discusses built-in reporting specifically for proposals. If these reports do not include the information for strategic initiatives for specific KPIs, we do offer ways of exporting data outside of service**minder** to data analysis tools such as Domo or a Tableau.

Settings and Navigation

Franchisees can access only reports for their organization. They will go to **Reports** in the main navigation bar.

Brand Admins can access brand-level reports in **Dashboard > Reports** tab. From this reporting hub, brand reports pull data from all active organizations.

Proposal Summary

This report shows all Proposals created, accepted, invoiced, booked, and scheduled for a given date range. You can adjust the date range or filter based on additional criteria.

> ℹ️ If adjusting settings, date range or filters - you will need to select the **Refresh** button.

The data is independent because the columns don't reflect numbers that are related to the other columns - they are only showing the numbers of that type for that date range, nothing else. For instance, the number of proposals invoiced for that time frame is totally separate from the number of created proposals for that timeframe.

Example:

You've set your date range for last week. **Proposals Created** shows 3 for the week, but **Proposals Accepted** shows 5. This is because the accepted proposals could've been created two weeks ago, last month, or six months ago.

> 🔔 If your numbers are not adding up on the report, understand that you can have a proposal outside the selected date range that was accepted during the date range. Meaning you have 0 created proposals but 1 accepted proposal.

Brief Explanations

- **Date From/Through** - The date range for when the proposal(s) were approved
- **Created After/Through** - The date range the proposal(s) were created
- **Updated After/Through** - The date range of the proposal(s) most recent update
- **Completed After/Through** - The date range for when the proposal(s) were marked as completed
- **Booked -** refers to all proposals that have been accepted by have not been scheduled yet (these include queued appointments)
- **Scheduled -** refers to proposals that have been both accepted and are confirmed on the schedule
- **Invoiced -** proposals invoiced in the time frame
- **Declined -** proposals declined within the time frame

Open Proposals/Options

Shows all the proposals that are created but not accepted through a specific date range.

FAQ

Q: On the Proposal Close Rates report, what appointments are tracked in the "Scheduled" column?

A: That column tracks appointments that are scheduled through the proposal. More specifically, it is tying to appointments scheduled through the proposal screen and using the "Schedule" button there.

Q: What if we schedule appointments not from proposals? How do we track that?

A: One option is to use the appointments download, select scheduled and a time frame (or leave it blank to get all that are in the scheduled status). This would capture all of the appointments as opposed to just the one's scheduled through the proposal.

To learn more about Appointment Reporting, please review this help page.

Q: Do change orders count as separate proposals in the Proposal Summary and Proposal Closing Rate reports?

A: Proposal Summary and Proposal Close Rates do not count a change order as a separate proposal. They are looked at as addendums to the root proposal. In the example described, this would be reported as 1 accepted proposal.

Please see this additional article of you would like to learn more about Change Orders.

Q: Do Proposal Summary and Proposal Close Rates reports use the same underlying data, e.g., Accepted Date?

A: These two reports are based on different date filters. Proposal Close Rate is based on created at date and is a brand-level report. Proposal Summary is an org-level report, and the accepted column is based on accepted date of the proposals.

Q: What is the difference between Proposal Summary and Pipeline report in regards to won or accepted proposals? I've noted inconsistencies.

A: The Proposal Summary report is based on actions in that timeframe. This is reporting how many proposals have an accepted date for your chosen date range. However, the Pipeline report is referencing proposals dated that month.

The two reports are filtering on different dates, Pipeline = Proposal Date while Proposal Summary for the Accepted column = Accepted Date.

If you would like to learn more, please review the page about Pipeline Report.