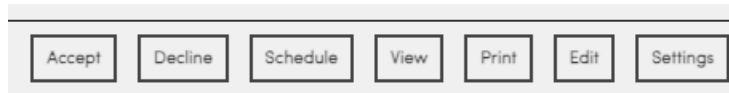


# Accept, View, and Print Proposals

01/02/2025 10:54 am CST

## Overview

On the **Proposal Details** page, there are many actions that you can take. These are listed at the top of the page:



Or below the proposal:



This article will discuss some of the more common actions. It picks up after you have sent the Contact the proposal, but as a reminder:

1. If the contact has an email address, you will have a **Send** button that will deliver the proposal via email. The contact will be able to click a link in the email to view the proposal.
2. You can also **Save** the proposal (which won't email it) and continue to work on it later until you're ready to send it.

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## Video Tutorial

[Click Here to Watch a Demonstration](#)

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## Proposal Acceptance

After you have created a Proposal, you can send the lead/prospect/opportunity a link to that proposal. If you have notifications turned on, an email will automatically be generated and sent to the Contact.



This is a live proposal link, so if you make edits and save the Proposal - you do not have generate a new link to send to them. The proposal will also update on their end.

## External Accept

The potential customer can click on **Accept** and apply an electronic signature to the proposal. If the proposal has any options, they can also choose the options they want. Once they accept it, you'll receive an email notification so you can then contact them to schedule.

## Internal Accept

You or someone within your company can accept on behalf of the Contact. If you want to mark the proposal as accepted verbally, there is an Accept option on the Proposal Details page. You'll be prompted for the name that you're accepting on behalf of.

### Accept Proposal

Please review any options or payment plans you may have for this proposal and then enter the name of the party you are accepting this proposal on behalf of:

Contact	Ned Neighborly Saint Albans Park Trail   Saint Albans, WV 25177 Pri (000) 000-0000 (Mobile)
Accept on Behalf of*	<input style="width: 100%;" type="text" value="the customer name"/>
Offer Code	<input style="width: 100%;" type="text" value="None ▼"/>
Subtotal	\$1,185.00
Tax	\$0.00
Total	\$1,185.00

Then you can schedule after clicking **Accept**.

## Proposal Scheduling

Once a Proposal has been accepted (or even if it's Open and you're ready to move forward), you can schedule the work to be done. Depending on the Service as well as whether it will be a single appointment or multiple, you have several options available.

For the simple case where the proposal will turn into a single appointment, you can just click the Schedule button (or link, if from a grid). You'll be taken to the **Schedule an Appointment** page and everything will be pre-populated, including the contact. Select the date and time or any other scheduling options and schedule the appointment like you would any other regular appointment.



If the proposal's Service has Chaining enabled, you can still schedule the Proposal. The proposal will then list all of the appointments as part of the Project. The completion percentage will also automatically calculate.

You can also schedule appointments directly using the **Add an Appointment** action. Any proposal that has more than one appointment scheduled/attached to it will be converted to a Project and show up in the Projects snapshot. They will continue to be in that snapshot until all attached appointments are completed. Learn more about [Project-Based Business Flow](#).

## Clear An Acceptance

If you realize that you need to make an edit to an accepted Proposal, it is easy to do so. This proposal cannot have been invoiced, or you will be unable to edit.

If you are on the Contact Details page, you will see an Accepted Proposal show up this way.

**Additional Details** Timeline

Map Notes **Proposals (1)** Appointments (1) Invoices (1) Pictures Documents

Tasks (0/0) Checklists

Proposals  Change Orders

Page 1 of 1 (1 items) ◀◀ 1 ▶▶

See status is accepted.

#	Date	Service	Status	Title	Total	Owner
<a href="#">Schedule</a>	<a href="#">6/27/2024</a>	<a href="#">Honeybadger Removal</a>	Accepted	Honeybadger Removal	\$210.00	Heather Gatlin

Click here

Click on the **Date** of the proposal you want to edit.

Scroll to the bottom of the Proposal page. There is a section called **Acceptance**. If the proposal hasn't been accepted, you will see a blank field. If it has been accepted, it will tell you by whom and what the date of acceptance was.


**Acceptance**


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This proposal was accepted on Thursday, June 27, 2024 on behalf of ned by Heather Gatlin [Clear...](#)

Hit **Clear**. A popup will ask if you are sure you want to unaccept the proposal. Click Yes, and the proposal will go back to Open status. You can then decline it (by hitting Decline at the top) or let it expire.

This will make the proposal **Open** again. This will allow you to make edits, then accept the proposal internally on the customer's behalf or send it to the customer to have them add a signature.

 If the proposal has already been invoiced/scheduled, the status may not revert back to **Open**.

 Did you (or the Contact) accidentally **Decline** instead of accept? You can fix it the same way. Scroll down to the Acceptance section and you will see the date of the decline and the same **Clear** button.

You can see all the options of **Decline Reasons** if you go to **Control Panel > Proposals**.

## View Proposals (Customer View)

To **View** a previously created proposal, you can go to **Open Proposals** located under **Snapshots** in the left-hand Navigation Panel.

**Snapshots**

Pulse

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At a Glance

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Open Invoices 8

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Projects 3

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Accepted Proposals 2

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**Open Proposals 6**

(or) You can go to the **Contact Details page > Proposal tab.**

Contact [Proposal] [Schedule] [Merge] [Edit] [Delete] Additional Details [Timeline]

Name Ned Neighborly  
 Phone (000) 000-0000 (Mobile)  
 Service Address Saint Albans Park Trail | Saint Albans, WV 25177 | Copy  
 Drive 4 mins (1.3 mi)  
 Category Customer  
 Lead Source Referral  
 Tags New Customer  
 Lifetime Value \$500.00

Map Notes **Proposals (1)** Appointments (1) Invoices (1) Pictures Documents  
 Tasks (0/0) Checklists

Proposals  Change Orders  
 Page 1 of 1 (1 items)

#	Date	Service	Status	Title	Total	Owner
<a href="#">Accept</a>   <a href="#">Edit</a>	6/27/2024	<a href="#">Honeybadger Removal</a>	Open	Honeybadger Removal	\$210.00	Heather Gatlin

Then click on the **Date of the Proposal** that you would like to view.

That will open the **Proposal Details** page. Then click the **View** button at the top of the screen to see what the proposal looks like from the customer perspective.

**I N V O I C E**

Bob's Handyman - Plano  
3308 Preston Rd 350 232  
Suite 350-232  
Plano, TX 75093  
(860) 786-4121

**bob's handyman**

[www.serviceminder.co](http://www.serviceminder.co)

**Billing/Service Address**

Bodie Kahuna  
3601 Dallas Pkwy  
Plano, TX 75093  
(805) 704-1325

Invoice #	2319
Date	May 05, 2023
Service Date	May 06, 2023
Balance Due	\$3,520.00

Item	Description	Area	Quantity	Amount
Installation	System installation, as designed.		1	\$2,265.00
Bundle Assembly	An assembly with a couple of parts in it		0	
BB3	well light		4	
BB3	well light		4	\$940.00
BB3	well light		1	\$235.00
Deck - Ground Level	Wood deck - ground level		1	\$80.00
Subtotal				\$3,520.00
Tax				\$0.00
Total				\$3,520.00
Amount Paid				\$0.00
Balance Due				\$3,520.00

**P I C T U R E S**



Coffee - Questions.png



IMG\_8399.jpeg

This customer view will also show terms and conditions and the customer signature.

## Print a Proposal

Clicking **Print** will deliver the signature block and all attachments, while "right clicking" to print the page will remove the signature block.

**A C C E P T E D C H A N G I N G P R O P O S A L T E X T**

Monsters Inc.  
 Monster Drive  
 Saint Albans, WV 25177  
 (0) -  
[heatherg@serviceminder.com](mailto:heatherg@serviceminder.com)  
[www.serviceminder.com](http://www.serviceminder.com)

**bob's handyman**

**Billing/Service Address**

Ned Neighborly  
 Saint Albans Park Trail  
 Saint Albans, WV 25177  
 (000) 000-0000 (Mobile)

Date	June 27, 2024
Total	\$210.00

View [↗](#)

Added some information just to see where it shows up.

Item	Description	Qty	Rate	Amount
Honeybadger Removal	No badgers allowed.	1	0.00	\$100.00
1. Disguise	required for sleuthing	1	25.00	\$25.00
Honeybadger Trap	for honeybadgers only - not monster or ghost approved	1	85.00	\$85.00
Subtotal				\$210.00
Tax				\$0.00
Total				\$210.00

**Print** 2 pages

Destination Save as PDF ▾

Pages All ▾

Layout Portrait ▾

More settings ^

Paper size Letter ▾

Pages per sheet 1 ▾

Margins Default ▾

Scale Default ▾

Options

Headers and footers

Background graphics

Print using system dialog... (⌘P)

Open PDF in Preview

Cancel
Save

Attached photos print "2-up" to save space. This is the same for proposals and/or invoices.

## FAQs

### If I clear the acceptance and then accept it again, it would change who accepted the proposal and the IP address. Does that make the terms and conditions not legally binding?

We are not legal counsel and it may be different depending on terms and conditions of the brand or your own attorney's recommendations. Within serviceminder, if the customer originally accepted the proposal that is considered an external acceptance and an IP address is captured. If you have to clear the acceptance for whatever reason and re-accept the proposal on behalf of someone then it is considered an internal acceptance and capture your IP address in the audit trail.

### Which circumstances would SM automatically invoice a proposal after it's accepted?

The system will automatically invoice the proposal if the **Invoicing Mode** on the service is set to "Proposal Accept" and a payment is made from the client's end at signing. This isn't just for payment plans, it includes if you just marked a deposit amount required when creating the proposal

To change the Invoice Mode setting you would go to Control Panel, then click on Services. Then you click Edit on the service you want to make the change to. You will find it under the Invoicing section of that page.

### Can I edit the Proposal Print Template?

Yes, however, it is HTML based. That means you need to have a modicum of coding know-how. We DO NOT

recommend attempting that unless you are confident in your abilities. You can also submit a Support ticket about what changes you would like to see.



We cannot accommodate every and all changes to the **Proposal Print Template**. You can always ask, but we may say 'no'.

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## Troubleshooting

**We have an issue where we cannot edit an already accepted proposal and have to make the changes on the invoice. When this happens, technicians cannot see the updated invoice when they go to Projects and can only see the old accepted proposal.**

You can use a [Change Order](#) if you need to edit an accepted proposal that already has been invoiced or scheduled. With a change order, you can add new items, or remove line items by entering a negative quantity. Once the change order has been accepted (either internally or by the client) you'll need to merge the invoices so that your techs see the final information.

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