Top 10 Questions: Proposals

08/15/2025 5:02 pm CDT

Overview

These are the most frequently asked questions about Proposals within service**minder**.

---

1. What is the difference between "Won" and "Accepted" proposals?

- **Accepted**: Shows only proposals currently in the “Accepted” status in the proposal grid.

- **Won**: Includes all proposals that are completed, invoiced, scheduled, or accepted—a catch-all for anything representing revenue. Some owners also use it to track accepted proposals that haven’t yet been scheduled, but this is a personal workflow preference.

---

2. What does the "Zero Pricing" button do on Proposals for Parts/Add-Ons?

This applies to **part assemblies**. Part assemblies let you bundle parts together with specific quantities and price them as a group.

- To create a new assembly, add a new part and check the **Assembly** checkbox.
- Edit the assembly to include additional parts, specifying quantities for each.
- You can choose to add the assembly parts at **zero price** instead of the default unit price.

---

3. Can you explain flash messages, contact notes, and internal notes?

- **Contact Notes:** Any notes made on a contact. Visible to the customer, but can be seen by all users with the Contact:Notes permission granted.
- **Internal Notes**: Visible only to users within the account (including service agents). Use them as reminders about past work or customer requests. Not visible to the customer.
- **Flash Messages**: Highlight critical information (e.g., gate codes, “don’t let the dog out”) for service agents. Also not visible to the customer.

Where Notes Appear:

- Proposal internal notes show under **Additional Details > Proposal Notes** on the appointment.
- Additional notes added during scheduling appear in the **Notes** tab and can be marked **Private**, visible only to users with permission. Permissions can be adjusted via **Control Panel > Users > Edit User > Permissions > Contacts: Notes**.
- Notes carry over to invoices generated from proposals or appointments but never appear on customer-facing versions.

---

4. How do I edit our billing address on the proposal without changing the warehouse address?

Go to **Control Panel > General** and edit your **mailing address**. Proposals use your mailing address, so update this if you want it to differ from your warehouse address.

5. Can I add shortcodes to the subject line for proposal emails?

Yes, you can edit the templates and adjust the subject line to add shortcodes. Contact shortcodes and proposal shortcodes will both work for proposal emails.

Full list here: https://serviceminder.io/support/index/14

6. Why are there amounts crossed out on the proposal?

Lines are crossed out when they are **Options** that the customer has not yet selected. When a value is entered in the Options column, it becomes an optional line for the customer to accept or decline. Learn more about how to create Proposal Options.

7. How can I create a proposal template?

1. Go to **Control Panel > Parts/Add-Ons > Templates**.
2. Assign a **Service** to the template, ensuring it's for a **Proposal** and not a **Project**.
3. Add any **Parts** that you want to include on the template.
4. Optional items (e.g., warranty) can be added under the **Optional** column.

The Service **cannot** be set to **Close Appointment** as the **Finish Action** to be available as a proposal template.

Learn more about Proposal Templates.

8. Why can proposals be edited sometimes but not others?

Open Proposals: Editable until accepted. Some changes (like proposal terms) update automatically; line descriptions do not.

Accepted or Scheduled Proposals: Locked. To edit, create a Change Order or clear the acceptance for the customer to re-accept.

9. I accidentally accepted a proposal. Clearing acceptance did not revert it to open. Why?

If an appointment is attached, the proposal is now considered **Scheduled**. You can learn more about Clearing an Acceptance on a proposal.

10. How do I get rid of projects?

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.

To disable project tracking on that proposal:

- Open the proposal, go to **Settings**, and uncheck **Track as a Project**.
- For invoices, click **Complete** in the top right to remove it from the project grid.