Top 10 Questions: Proposals

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Overview

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

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

Accepted in the proposal grid is only proposal in the current status of "Accepted".

“Won” category shows all completed, invoiced, scheduled, accepted. Kind of a catch-all of everything that means “money coming in”. It is also a category that some owners use to keep track of accepted proposals that haven't had appointments scheduled. However, that is a personal preference on workflow.

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

This is regarding part assemblies.

Part assemblies allow you to define a "bundle" of parts that should be priced as a group. For example, you might have a package offering that includes several other parts (specific quantities as well). Do add a new assembly, just add a new part and check the "Assembly" checkbox. You can then edit the part to add additional parts to the assembly. For each part, you can specify the quantity for that particular assembly. You can also specify that the assembly parts are added with a zero price (instead of whatever the default unit price is).

3. Can you provide more information about flash messages, customer notes, and where internal notes are visible?

Internal notes can be see by the users within the account including service agents, so they are meant to be used as reminders about prior work or requests by the customer, essentially anything that would be useful for reference later. These are not seen by the customer.

A flash message is a separate field specifically for main notes such as gate codes or "don't let the dog out". Messages that absolutely should not be missed by the service agent. This is also not seen by the customer.

Internal notes written on a proposal are displayed in the "Additional Details" section of the appointment under the "Proposal Notes" tab. If you schedule the appointment off a proposal, then you have the option to add additional notes that appear in the "Notes" tab.

Those additional notes can be marked as "Private" meaning that only users with the permission can see them. You can adjust these permissions for users by going to **Control Panel>Users>Edit User> Permissions** scroll down to the section that says **Contacts:Notes**. There are two categories they need to mark as either grant or deny.

If you generate an invoice based off the scheduled appointment or the original proposal, then the notes should carry over but they do not show up on the customer-facing version of the proposal or invoice or the receipt.

4. How do I edit our billing address on the proposal?

You'll go to **Control Panel > General** and **Edit** your address there. The address displayed on proposals is based off of your mailing address, so you'd only have to change that one if you want your warehouse address to remain the same.

5. Is there any way to add shortcodes to the subject line for the proposal emails?

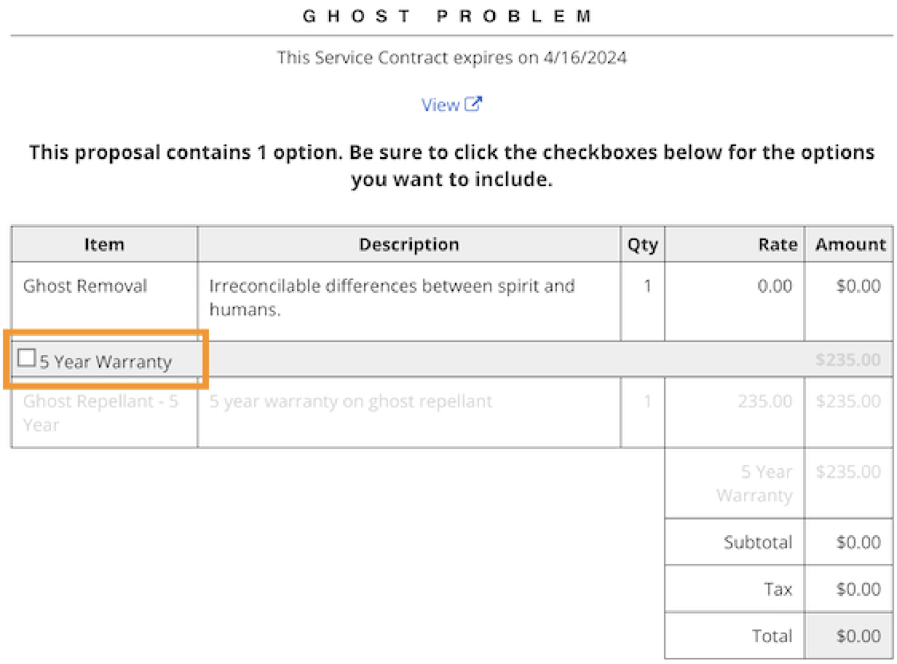
Yes, you can edit the templates and adjust the subject line to add shortcodes. Contact shortcodes and proposal shortcodes will both work for proposal emails.

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

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

Those lines are crossed out because they are marked as **Options** that the customer has not selected yet.

When something is typed in the Options column when editing the proposal, they are clustered together as an option for the customer to opt in or out of. Below is an example of what an optional service looks like on a proposal for a customer.



GHOST PROBLEM

This Service Contract expires on 4/16/2024

View

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

Item	Description	Qty	Rate	Amount
Ghost Removal	Irreconcilable differences between spirit and humans.	1	0.00	$0.00
☐ 5 Year Warranty				$235.00
Ghost Repellant - 5 Year	5 year warranty on ghost repellant	1	235.00	$235.00
			5 Year Warranty	$235.00
			Subtotal	$0.00
			Tax	$0.00
			Total	$0.00

Learn more about how to create Proposal Options.

7. How can I create a Service template?

To create templates based on services, you can go to **Control Panel > Parts/Add-Ons** > and select **Templates** from the top right button options.

Attach the template to the chosen Service and make sure it is for a "Proposal" and not a "Project." The screenshot shows how to add the warranty under the "Optional" column.

Then you should be able to select the created template whenever generating a proposal.

> The **Service** associated with the template must be set to **Generate Invoice** as the **Finish Action** to be available as a template.

You can learn more about Proposal Templates on a separate article.

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

Open Proposals can be edited since those haven't been accepted yet. Only after acceptance are they locked and you would need to do a change order or clear the acceptance, edit, and have the customer re-accept.

For open proposals that are not accepted, only a few changes will apply automatically. If you change the proposal terms, open proposals will get the updated terms automatically. Accepted proposals will not.

For things like line descriptions, those do not update on open proposals (or anywhere that's already created.) If you need to update service/part lines, those would have to be done manually.

9. I accidentally accepted a proposal. We canceled the acceptance but it did not revert back to an open proposal. Please advise.

I believe the only reason this has not reverted back to an open proposal is because there is an appointment attached to it. It is now considered a "scheduled" proposal.

You can learn more about Clearing an Acceptance on a proposal.

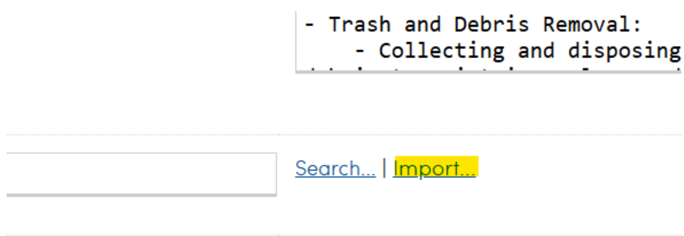
10. What is the most optimized way of generating several proposals from an existing?

Instead of creating revised Proposals, copy the original proposal (button at the bottom), make edits, save then bundle the two (or more) Proposals together. You can copy it as many times as you need to and that way you don't have a string of versions.

You can learn more about Proposal Bundling here.

11. What do I need to do to create a schedule for 3 different lines on a proposal?

When you click **Schedule**, the line below the service will have an Import button. Click that, and it'll pull up the lines from the proposal. You can check the box for any you want to add to the appointment.



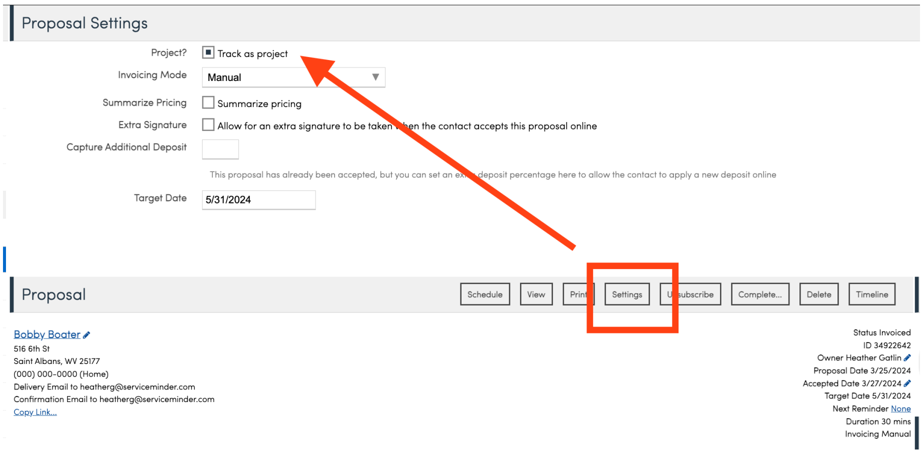
12. The total revenue for Job A is $20k and we received a payment of $7k already. Can we edit the existing proposal to subtract the amount paid? I can't seem to edit the proposal and this is signed by the customer.

At this point, you may want to create a change order to attach to the new proposal for whatever the rest of the work should be. They can then merge the change order invoice into the original, and apply the payment.

13. How do I get rid of projects?

Any proposal that has one appointment scheduled/attached to it will be converted to a Project and show up in the Projects snapshot. There are plans on updating if/when projects are created since they are only really necessary for construction-based businesses and not very much of a help for your workflow. Those updates to ServiceMinder won't be until late next year, so there are ways that you can clear it out or stop it from tracking.

When click on a proposal, you can go to "Settings" at the top of the proposal and uncheck the box to track as a project.



On an Invoice, push the "Complete" button in the top right. That will clear it from the project grid.