

Terms and Conditions

12/22/2025 10:08 am CST

Overview

You can set up **Terms & Conditions** for your proposals as well as **Above the Fold** text for both proposals and invoices. This allows you to customize your messaging as well as supply pertinent terms for the customers' approval.

These fields support [Markdown](#) as well as HTML.

This article will review:

- [Settings and Navigation](#)
- [Terms and Conditions](#)
- [Above the Fold](#)
- [Proposal Print Template](#)
- [Invoice Terms](#)
- [FAQs](#)

Settings and Navigation

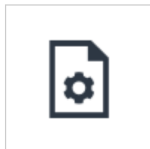
Settings for Terms and Conditions and Above the Fold Text can be found in **Control Panel > Document Text**.



[Document Text](#)

Manage Terms & Conditions and above-the-fold text.

There are also settings about the look of the Proposal that exist in **Control Panel > Proposals**. Learn more about those settings on this page: [About Proposals and Settings](#).



[Proposals](#)

Configure proposal behaviors.

Terms and Conditions

The terms are version-controlled, so new versions are created with each edit. When a proposal is accepted, the proposal text that was in place at the time of acceptance is locked (so new terms won't apply to older, already accepted proposals.) Changes to terms will apply to open and new proposals.

Add...	Version	Services	Description	Date	Active
Edit	5	All	Fall 2025	8/15/2025	Yes
Edit	4	Test Service, Example Service	Summer 2025	8/15/2025	Yes
Edit	3	All	Empty Default	6/20/2025	No

These display below the summary table and action buttons.

Terms and Conditions*

```
1 <font size="3">
2
3 Terms and Conditions
4
5 1. Introduction
6 Welcome to [Company Name]. By accessing or using our services, you agree to comply with an
7
8 2. Use of Services
9 You agree to use our services only for lawful purposes and in accordance with these Terms.
10
```

Match Services

A convenient setting for the proposal text is that you can select certain services for the terms to appear on, so you can customize the terms for individual services/groups of services. If you leave the services unselected, the terms will display on **All**.

Match Services

- ☐ Annual Maintenance
- ☐ Annual Maintenance Plan
- ☐ Barrier Spray - 2 Weeks
- ☐ Basic Build
- ☐ Bathroom Install
- ☐ Bug Service



Setting terms to All means they'll show on services that **don't** have a separate T&Cs applied to them.

Above the Fold

Above the Fold text will display above the proposal summary table and below the header section of the proposal.

When adding a new set of terms, the Above the Fold section will not display immediately. Save the new terms, then edit them to adjust the Above the Fold text.

Markdown syntax [documentation](#). Click [here](#) to preview.

Proposal Above the Fold

```
1 Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor  
2
```

When viewing, editing, or paying an invoice:

- If the invoice is tied to a signed proposal that includes *Above the Fold* content, that content is displayed first.
- If not, the system will fall back to the *Above the Fold* content based on the invoice's service type.

Proposal Print Template

Proposal terms do **not** appear on the print templates due to limitations with the PDF generating platform. You can use the web view of the proposal as the print template (**Control Panel > Proposals**).

There is an additional area where you can edit the HTML for Print Templates. These include Appointments, Invoice Reminders, and Proposals. You can use Proposal shortcodes to add additional information that shows only for the Print version of the Proposal.

Go to **Control Panel > Print Templates**.



[Print Templates](#)

Edit the letters and forms that serviceminder generates.



This is a more advanced change. If you are unsure of what code to change, you can get yourself in quite the pickle. Please ask for Support assistance if needed.

Print Templates

Message:

- ✓ Appointment Cover
- Appointment Renewal
- Appointment Ticket
- Invoice Reminder
- Proposal

[Preview...](#) [Return to Default](#)

Editor

```
1 <?xml version="1.0" encoding="utf-8" ?>  
2 <Page>  
3   <Font name="reverse" font-family="Helvetica" color="rgb(255,255,255)" font-style="bold" />  
4   <Font name="details" font-size="8"></Font>  
5  
6   <Table width="100%" cell-borders="0">
```

Invoice Terms

Your browser does not support HTML5 video.

Setting up Terms

This setup is in **Control Panel > Invoices**. Scroll down to "Terms" and you'll see the serviceminder standard Default is already created (Due upon Receipt). This default is easily edited by the user. To add additional terms, click "Add" on the table.

Invoice Settings

Terms

Default Invoice Terms
None ▼
What invoice terms should be used by default

Add...	Name	Active	Created	Updated
	(All)	▼	Q	Q
Edit	Delete	Default Terms	Yes	10/19/2024 7:16p

Contact-specific Terms

To create a custom set of terms for a specific contact, go to that contact and **Edit**. Scroll down to find the **Terms** setting:

Edit Contact Bob Smith

Lead Source*

Referral ▼ --Campaign/Partner-- ▼

Invoice Terms
None ▼

☐ Unsubscribed?

Choose the desired Invoice Term for that customer. This will override any Default organization terms. A user may also go back to Control Panel>Invoices to create as many additional terms as desired.

Invoice-specific Terms


An invoice will automatically present the Organization's default terms, or, if the Invoice is for a Contact who has been assigned unique terms, then any invoice for that Contact will have those terms applied.


A user may change a unique Invoice's terms, as well. After an Invoice is created, go to Settings and select the desired Terms, then save.

Invoice I3862316

[View](#) [Print](#) [Edit](#) [Settings](#) [Me](#)

Details

[Bob Smith](#) 
7913 Doulain Dr

Status Open
Owner Katie H 

Email

☒ anotherfakeemail@whatever.com

☐

Customer Note

Job Number

Total Payment Limit

Max Amount: \$1,000.00

Enter an amount or additional percentage to set the Due Now amount to capture from the client

Invoice Terms

None ▼

☒ Approved?

FAQs

Q: How do I make the proposal terms and conditions look more styled?

A: If you're interested in adding bold font or other styled text to terms and conditions, you can easily do so with [Markdown](#). Markdown is a type of easily applying highlights or header text to your proposal, invoice, or even customer notes. You do not need to be an expert in coding to use Markdown. It is beginner-level for users that want more control over the look of their T&Cs.

However, we strongly urge you to speak with your brand admin before adjusting your business terms and conditions.
