Terms and Conditions

07/10/2025 8:27 am CDT

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 proposal expires on 1/22/2023

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Click here if you no longer wish to receive notifications or related information about this proposal.

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**).

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Settings and Navigation

While these settings live in Control Panel > Proposal Text.



<u>Proposal Text</u> Manage Terms & Conditions and above-the-fold text.

There are also settings about the look of the Proposal that exist in **Control Panel > Proposals**.



<u>Proposals</u> Configure proposal behaviors.

Learn more about those settings on this page About Proposals and Settings _ DRAFT.

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.

Proposal Terms and Conditions				
Page 1 of 4	4 (31 items)			
<u>Add</u>	Version	Ŧ	Services	
<u>Edit</u>		<u>30</u>	Bug Service	
<u>Edit</u>		<u>29</u>	Pressure Clean, Build Stuff	
<u>Edit</u>		<u>28</u>	Pressure Clean, Build Stuff	
<u>Edit</u>		<u>27</u>	Installation	
<u>Edit</u>	26 Installation			
<u>Edit</u>		<u>25</u>	Build Stuff, Pressure Clean	
<u>Edit</u>		<u>24</u>	Pressure Clean	
<u>Edit</u>		<u>23</u>	Pressure Clean	
<u>Edit</u>		<u>22</u>	All	

These display below the summary table and action buttons.



Match Service

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**.





Above the Fold

This will display above the proposal summary table and below the header section of the proposal.

Proposal Terms and Conditions are automatically version controlled. When you update your Terms and Conditions, service minder in creates a new version. Use the Name field to specify a label for this particular version.

Main Terms - All Services
Include (status) where you want the proposal's status shown
Leave empty for the default "TERMS & CONDITIONS" header
1 Here's some above the fold text!

Additionally, there is a field to configure **Invoice Above the Fold** text.

- 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

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.



<u>Print Templates</u> Edit the letters and forms that serviceminder.io 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:	Proposal	▼	Preview	Return to Default		

Editor

```
1 ![logo]({logo})
2
3 {organization.name}
4 {organization.addressline1}
5 {organization.addressline2}
6 {organization.addressline3}
7 {organization.addressline4}
8 {organization.addressline5}
9
10 
11
   12
     13
      {contact.addressline1}
14
       {contact.addressline2}
       {contact.addressline3}
15
       {contact.addressline4}
16
17
       {contact.addressline5}
18
     19
        <img src="https://serviceminder.io/service/proposal/qrcode/{proposal.hash_key</pre>
20
21
        Scan to view this proposal online
22
     ~ ~
```

Invoice Terms

Invoice terms are separate from Terms and Conditions for proposals. This section only shows on Invoices.

Terms can be set for an Organization, a Contact or a unique Invoice. Click here for details on setting Invoice terms.

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			Logg	ed in as Karen Libby 🌲 2 🌣 <u>Log ou</u>
Default Invoice Terms	Default Terms What invoice terms should be used by default			
	Add Nome	Active	Created	Updated
	Edit Delete Default Terms	(All) •	Q 10/18/2024 12:00a	Q 10/18/2024 10:28a
	Edit Delete 60-Day Commercial Terms	Yes	10/18/2024 10:27a	10/18/2024 10:27g
	▼ Create Filter	103	10/10/2024 10:304	10/10/2024 10:300
	2. •		Pag	e 1 of 1 (3 items) < i of 1 >
Finance Charge Rate	1.5 %			
Finance Charge Part	The period rate for finance charges Finance Charge V What part to use for finance charges V			
Auto Apply Finance Charges?				

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:

>	Contacts > Adolfo Lopez - Mac Techn	ologies > Edit Contact			
Ī	Phone 3		Select one V		
	Telephone		Select one V		
	Test Phone Number		Select one V		
	Email	libbykaren@gmail.cor	n		Email Declined?
	Email 2				
	Test Email – BB				
	Next Service Date		Select One		Declined?
	Category*	Customer	•		
	Credit Hold?				
	Tags	AMPP Blue Honey Badger Pros Spring 2023 Premiu	bub Carpet Cle pect Hurricane Katr Im Email Spring 202	aning Co ina Land 4 Spring	ountertops CTA24 I C scape Lighting McKinnia Text Blast 2024 Test (SM
l	Add to TaskBoard	Select one	▼		
	Accounting Class	Select one V			
	Lead Source*	Referral v	Existing Customer		
	Invoice Terms	✓ None			
	Do Not Email	60-Day Commercia	l Terms		
	Do Not Mail	Net 30 / 1% Ten			
	Referred By		Q		
		Enter a portion of the no	ame or address		
	Matches				

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 65	B3 View Print Edil Settings Marge Void Delate Timeline
Gate Code 567	78#
Bodie Kohung (W 1452 F Rano Pikwy Piano, TX 75074 (805) 704-1325 (Mabi Email to baug@acme Bill To ACME Property N 4052 Kyndra Cir Richardson, TX 7509 (805) 704-1325 (Mabi Copy Link.	body.) Status Open Owner Karen Libsy Owner Karen Libsy Invoice Number 6683 Invoice Number 6683 som Created At 10/R2024 120p Created At 10/R2024 120p Proposal Holiday Liphting
Settings for I	nvoice 6583 for Bodie Kahuna (Woody)
Contact	Bodie Kahuna 1452 Erlano Pkwy Plano, TX 75074 ■ Customer ■ east ■ multi-shape
Invoice Date*	10/18/2024
Delivery	
Email	bugs@acme.com wile.e.coyote@ACME.com
Customer Note	
Job Number	
Total Payment Limit	Max Amount: \$100.00
	Enter an amount or additional percentage to so the Due Now amount to capture from the client
Invoice Terms Online Payments	✓ None 60-Day Commercial Terms 90-Days Default Terms Net 30 / 1% Ten
	Voided?
	Downloaded?
	Summarize Pricing?
	LExclude from End of Month Report?

FAQ

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.