Terms and Conditions

08/01/2024 12:06 pm CDT

Overview

You can set up **Terms & Conditions** as well as **Above the Fold** text that will appear on the web view of your proposals. 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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View

Here's some above the fold text!

Item	Description	Qty	Rate	Amount
Annual Maintenance	System inspection, clean condenser coils, check freon levels, replace filters.	1		$199.00

Subtotal	$199.00
Tax	$0.00
Total	$199.00

Offer Code [   ] Apply

Click here to apply for financing.

Accept Decline Print Forward

TERMS AND CONDITIONS

TESTING TERM STUFF

1. Here's a list of things
2. Don't forget
3. They're important

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

> ℹ 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**).
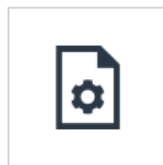
Settings and Navigation

While these settings live in **Control Panel > Proposal Text.**

Proposal 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**.

Proposals
Configure proposal behaviors.

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

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, serviceminder.io creates a new version. Use the Name field to specify a label for this particular version.

Name*	Main Terms - All Services
Active?	☑
Alternate Label	
	Include [status] where you want the proposal's status shown
Alternate T's & C's Header	
	Leave empty for the default "TERMS & CONDITIONS" header
Above the Fold	1 Here's some above the fold text!

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 (31 items) ⏮ ◀ **1** 2 3 4 ▶ ⏭

Add...	Version	Services
Edit	30	Bug Service
Edit	29	Pressure Clean, Build Stuff
Edit	28	Pressure Clean, Build Stuff
Edit	27	Installation
Edit	26	Installation
Edit	25	Build Stuff, Pressure Clean
Edit	24	Pressure Clean
Edit	23	Pressure Clean
Edit	22	All

These display below the summary table and action buttons.

Markdown syntax documentation. Click here to preview.

Terms and Conditions*

```
1 Testing Term Stuff
2 --------------
3
4 1. Here's a list of things
5 2. Don't forget
6 3. They're important
```

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**.

Markdown syntax documentation. Click here to preview.

Match Services
- ☐ Annual Maintenance
- ☐ Barrier Spray - 2 Weeks
- ☐ Barrier Spray - 3 Weeks
- ☐ Estimate
- ☐ Green Pool Cleaning
- ☐ One Treatment Option
- ☐ One Treatment Special
- ☐ Recurring Service
- ☐ Retreatment
- ☐ Service Call
- ☐ Service Call No Duration
- ☐ System Installation
- ☐ Year Contract

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

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**.

Print Templates
Edit the letters and forms that serviceminder.io generates.

> ℹ️ 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  <table style="width:100%;">
11    <tr>
12      <td valign="top">
13        <p>{contact.addressline1}</p>
14        <p>{contact.addressline2}</p>
15        <p>{contact.addressline3}</p>
16        <p>{contact.addressline4}</p>
17        <p>{contact.addressline5}</p>
18      </td>
19      <td valign="top" style="text-align:right;">
20          <img src="https://serviceminder.io/service/proposal/qrcode/{proposal.hash_key
21          <p>Scan to view this proposal online</p>
22      </td>
```