

Terms and Conditions

08/15/2025 12:19 pm 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 article will review:

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

Settings and Navigation

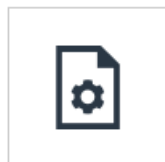
Settings for Terms and Conditions and Above the Fold Text can be found in **Control Panel > Proposal Text**.



[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**. 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.

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.

Terms and Conditions*	
Markdown syntax documentation . Click here to preview.	
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 the 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



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

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*

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!

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

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.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 <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       Scan to view this proposal online</p>
22     </td>
23   </tr>
24 </table>
```

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 Logged in as Karen Libby | [Log out](#)

Terms

Default Invoice Terms **Default Terms** ▼
What invoice terms should be used by default

Add...

Name	Active	Created	Updated
Edit Delete Default Terms	Yes	10/18/2024 12:00a	10/18/2024 10:28a
Edit Delete 60-Day Commercial Terms	Yes	10/18/2024 10:27a	10/18/2024 10:27a
Edit Delete Net 30 / 1% Ten	Yes	10/18/2024 10:30a	10/18/2024 10:30a

[Create Filter](#)

2. ▼

Page 1 of 1 (3 items) < 1 of 1 >

Finance Charge Rate **1.5** %
The period rate for finance charges

Finance Charge Part **Finance Charge** ▼
What part to use for finance charges

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 Technologies](#) > **Edit Contact**

Phone 3 **--Select one--** ▼

Telephone **--Select one--** ▼

Test Phone Number **--Select one--** ▼

Email **libbykaren@gmail.com** ☐ Email Declined?

Email 2

Test Email - BB

Next Service Date **--Select One--** ▼ ☐ Declined?

Category* **Customer** ▼

Credit Hold? ☐

Tags ☒ AMPP ☐ Blue ☐ bub ☒ Carpet Cleaning ☐ Countertops ☐ CTA24 ☒ Honey Badger Prospect ☐ Hurricane Katrina ☐ Landscape Lighting ☐ McKinnia ☐ Spring 2023 Premium Email ☐ Spring 2024 ☒ Spring Text Blast 2024 ☐ Test (\$M

Add to TaskBoard **--Select one--** ▼

Accounting Class **--Select one--** ▼

Lead Source* **Referral** ▼ **Existing Customer** ▼

Invoice Terms **None** ▼
60-Day Commercial Terms
Default Terms
Net 30 / 1% Ten

Do Not Email

Do Not Mail

Referred By

Enter a portion of the name 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 6583

Gate Code 5678#

Bodie Kahuna (Woody)

1452 E Plano Pkwy
Plano, TX 75074
(806) 704-1325 (Mobile)
Email to bugs@acme.com
Bill To
ACME Property Management
4052 Kyndra Cir
Richardson, TX 75082
(806) 704-1325 (Mobile)
[Copy Link](#)

Status Open
Owner Karen Libby
Invoice Number 6583
Invoice Date 10/18/2024
Created At 10/18/2024 12:10p
Proposal [Holiday Lighting](#)

View Print Edit **Settings** Merge Void Delete Timeline

Settings for Invoice 6583 for Bodie Kahuna (Woody)

Contact: Bodie Kahuna
1452 E Plano 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 add to the Due Now amount to capture from the client

Invoice Terms

- ☒ None
- ☐ 60-Day Commercial Terms
- ☐ 90-Days
- ☐ Default Terms
- ☐ Net 30 / 1% Ten

Online Payments

☐ Voided?

☐ Downloaded?

☒ Summarize Pricing?

☐ Exclude from End of Month Report?

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.

