

# Proposals in the Mobile App

01/29/2026 1:17 pm CST

## Overview

This article walks through how to create and send a proposal in ServiceMinder, from selecting a contact to reviewing pricing, deposits, and delivery options. You'll also learn how to schedule an appointment directly from an accepted proposal, ensuring a smooth transition from quote to booked service.

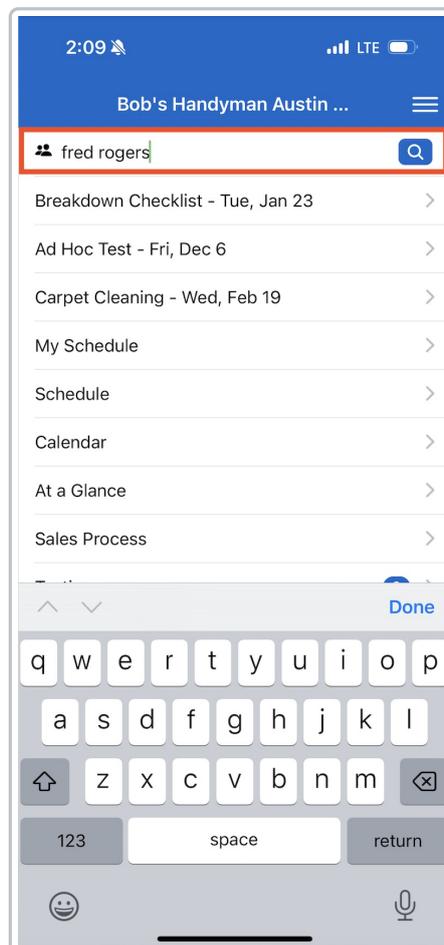
This article will review:

- [Draft a Proposal](#)
- [Schedule a Proposal](#)

## Draft a Proposal

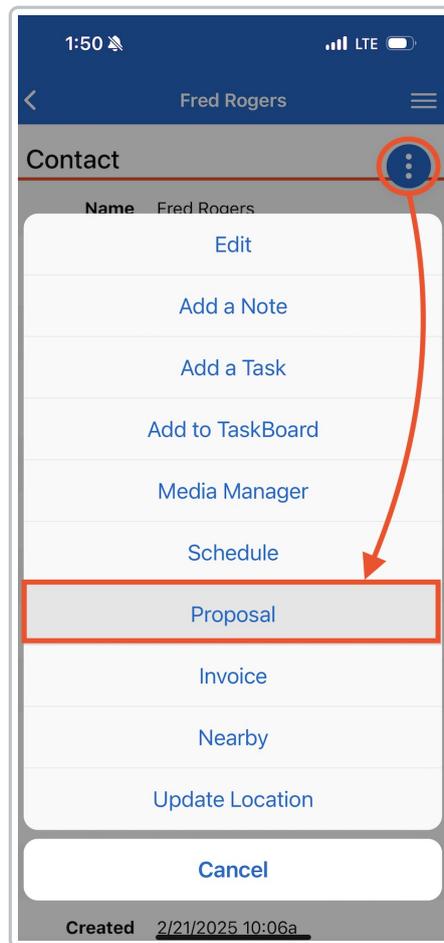
### 1. Find the Contact

From the home screen, use the search bar to find the customer. Type their name and press Return or tap the blue magnifying glass icon. Select the contact's name to open their Contact Details page.



## 2. Start the Proposal

Tap the three-dot icon in the top right corner. Select Proposal from the menu.



## 3. Enter Proposal Details

Tap the three blue dots next to "Select a Service".

Choose a proposal template or manually select a service from the dropdown.

Fill in details like description, quantity, base price, and rate.

If using a template, parts will auto-populate.

The screenshot shows a mobile application interface for editing a 'Service Line'. At the top, there is a blue header with a back arrow, the text 'Service Line', and status icons for time (1:51), LTE signal, and battery. Below the header, the title 'Test Service' is displayed. The form contains several fields: 'Template' with the value 'Test Template', 'Service' with the value 'Test Service', 'Description' with the text 'Sample description of service.', 'Quantity' with the value '1', 'Base Price' with the value '0', 'Rate' with the value '0', and 'Amount' with the value '\$0.00'. A blue 'Apply >' button is located at the bottom right of the form.

Template	Test Template
Service	Test Service
Description	Sample description of service.
Quantity	1
Base Price	0
Rate	0
Amount	\$0.00

#### 4. Add Parts (If Needed)

Tap Add, then search for the part.

Set whether the part is internal or optional.

Adjust quantity, unit price, and duration as needed.

2:00 LTE

< Detail Line

Search

Category

Part

Description

Internal Notes

Internal

Exchange

Option

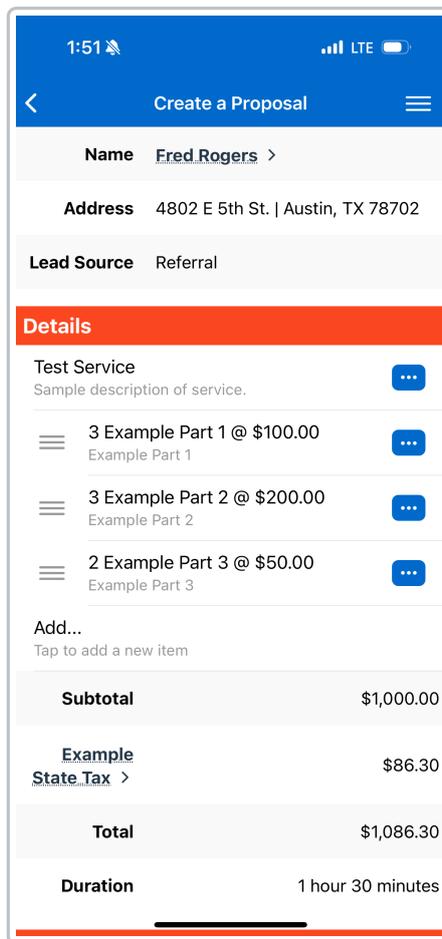
Quantity

Unit Price

Extended

## 5. Review Tax and Totals

Below the parts, review the subtotal, tax (if applicable), total, and duration.



## 6. Select Deposits and Payment Options

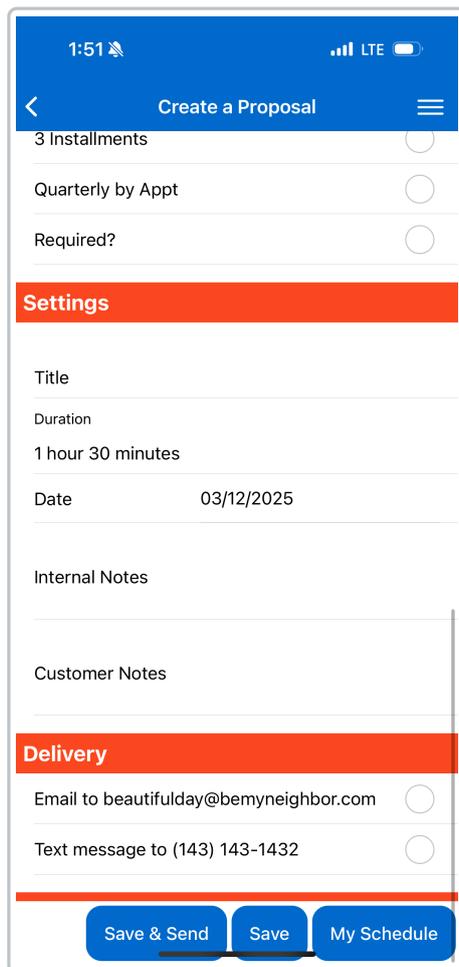
In the Deposit section, set a percentage or flat rate deposit that you'd like to collect.

If your organization offers payment plans, select one here.

Deposit	Deposit
Percent 30 <input checked="" type="radio"/> %	Amount <input checked="" type="radio"/> \$
Payment Plans	Payment Plans
1 DAY AFTER APPT? - Pick up waste service <input type="radio"/>	1 DAY AFTER APPT? - Pick up waste service <input type="radio"/>
12 Monthly Payments <input type="radio"/>	12 Monthly Payments <input type="radio"/>
2 Payments - Installment <input type="radio"/>	2 Payments - Installment <input type="radio"/>
3 equal payments <input type="radio"/>	3 equal payments <input type="radio"/>
3 Monthly Payments <input type="radio"/>	3 Monthly Payments <input type="radio"/>
50% Deposit <input type="radio"/>	50% Deposit <input type="radio"/>
Pay In Full <input type="radio"/>	Pay In Full <input type="radio"/>
Pay in full - get 5% off <input checked="" type="radio"/>	Pay in full - get 5% off <input checked="" type="radio"/>
Pay In Full (No Deposit) <input type="radio"/>	Pay In Full (No Deposit) <input type="radio"/>

## 7. Adjust Proposal Settings

Edit the proposal title, duration, date, internal notes, and customer-facing notes.



### 8. Send or Save the Proposal

Under **Delivery**, choose to send via email or text (two-way texting must be enabled).

At the bottom of the page, select:

- **Save & Send** - Sends the proposal via the chosen delivery method
- **Save** - Saves for later without sending



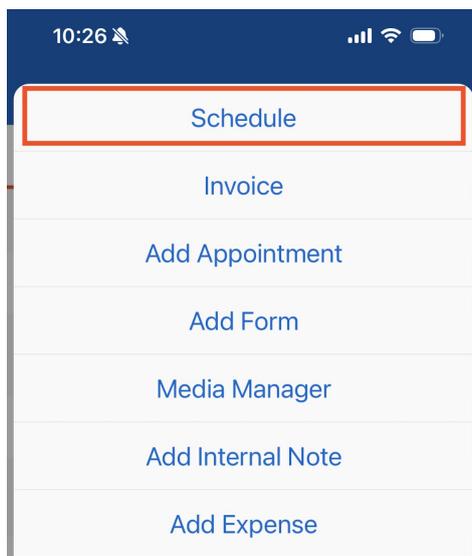
ServiceMinder automatically saves your progress when creating or editing proposals and invoices. If you're interrupted, lose connection, or need to step away, your work is preserved so you can pick up right where you left off. Drafts are saved locally and can be accessed later from the **Draft**

**Proposals** or **Draft Invoices** snapshots.

Snapshots	
Projects	40 >
Accepted Proposals	1 >
Open Proposals	22 >
<b>Draft Proposals</b>	0 >
Open Invoices	8 >

## Schedule a Proposal

Once the proposal has been accepted, you can click the three dots in the top right corner and select **Schedule**.



On the next page, you will be able to review the contact information as well as the service and parts included from the proposal.

Click **Add** to add new parts (line items) to the appointment.

1	Kitchen	\$79.00	\$79.00
Clean full kitchen including stove, oven and major appliances.			
Add... Tap to add a new item			
Subtotal			\$129.00

Select a Date and Timeframe for the appointment.

Select whether or not the appointment will be: **Ad Hoc** (scheduled manually, disregarding system scheduling settings) or **Queued** (penciled in for a date, knowing you need to come back later and schedule it for a time with a service agent).

Select any agent from the list of **Available Slots**. Filter by Service Agent using the search box in the orange bar.

<
☰
Schedule Proposal

---

Date 06/12/2025

---

Ad Hoc

---

Queued

---

Timeframe

---

Available Slots
🔍 Filter agents...

---

Thu, Jun 12, 2025 at 6:00a  
Gmail Agent  
19 hours 15 minutes

---

Thu, Jun 12, 2025 at 6:00a  
Monroe Agent  
19 hours 15 minutes

Optionally, choose any additional agents that need to be on the appointment.

Available Slots
✎

---

Britney Bowen - 6/12/25 9:45 AM
✓

---

Additional Agents
🔍 Filter agents...

---

Bonnie McMurray ⋮

---

Cody Test Agent ⋮

---

Demo Agent ⋮

Select whether or not you want to schedule the appointment as **Tentative**.

Choose to send a confirmation email or text (if two-way-texting is enabled).

---

Tentative

---

Confirmation to  
anotherfakeemail@whatever.com ✓

---

Schedule!

Click **Schedule!**