Proposals in the New Customer Experience

11/04/2026 4:16 pm CST

Overview

A proposal is the quote your customer receives for a job — from opening the link and reviewing their options to accepting the work and completing any required payment. The updated proposal page makes that journey easier to navigate, with clearer pricing, a guided acceptance flow, and a more polished, mobile-friendly design.

The updated experience is available behind the **Enable new customer experience** toggle.

Brand Administrators can find this setting under **Dashboard > Tools > Experience Settings**.

This article will review:

- How Your Team Builds Proposals
- Proposal Layout
- Accepting a Proposal: The Guided Flow
- Financing

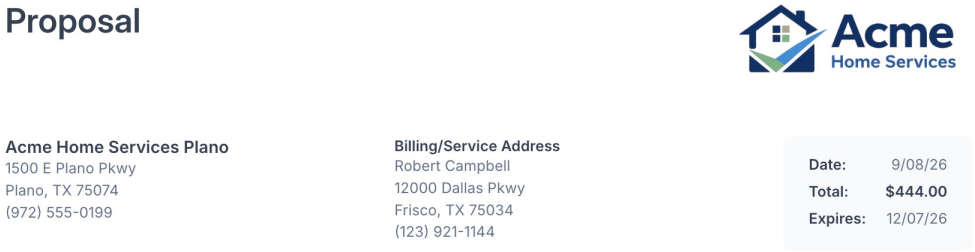
How Your Team Builds Proposals

Your internal proposal workflow is not changing with this update. Your team can continue to build, configure, price, and send proposals exactly as they do today. There are no new processes for you to learn and no need to rebuild your existing packages or proposal templates.

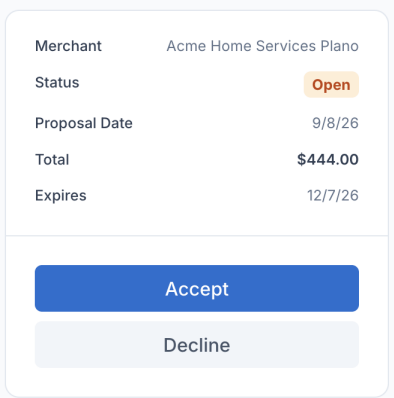
This updated customer-facing page pulls from the same information you already configure in ServiceMinder. The only change is how that information is presented to your customer. Your team keeps the workflow it already knows. Your customers get a better experience using the proposals you already build.

Proposal Layout

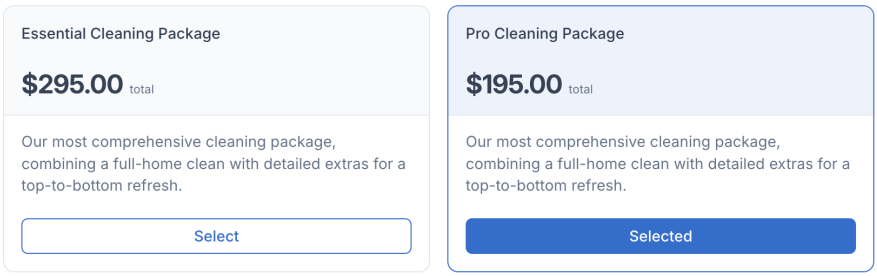
The updated proposal page presents your existing business, customer, and quote information in a cleaner, more structured layout. Your business name, address, and logo remain prominent, while the proposal date, total, and expiration date are easier to identify at a glance.



A dedicated summary panel keeps important proposal details and actions together, including the proposal status, total, expiration date, and **Accept** and **Decline** buttons. The proposal itself uses more readable spacing and a clearer layout for the services and pricing making it easier for customers to understand what they're reviewing and find their next step, especially on a mobile device.



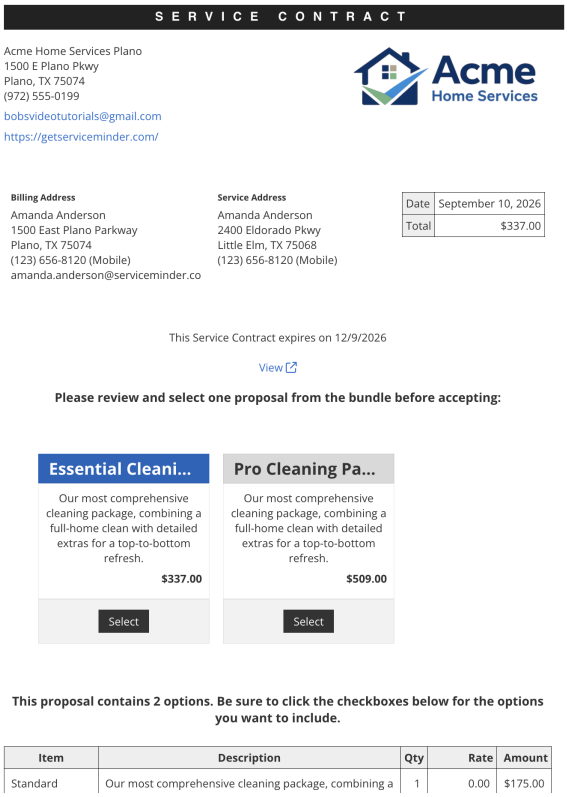
If you offer **bundled proposals**, the differences are especially noticeable. Bundles let you present customers with an either/or choice between packages, such as an Essential Cleaning Package or Pro Cleaning Package. Each package is now presented in a more clearly defined card, with pricing and key information easier to spot at a glance.



Item	Description	Quantity	Unit Price	Amount
Standard House Cleaning	Our most comprehensive cleaning package, combining a full-home clean with detailed extras for a top-to-bottom refresh.	1	0.00	$150.00
Additional Bathroom Cleaning	Adds a full cleaning of one bathroom beyond the standard service scope, including surfaces, fixtures, mirror, toilet, tub or shower, and floor.	1	25.00	$25.00

As customers move between packages, the selected option is more visually distinct, making it easier to tell which package they're currently reviewing and which one they've chosen. This creates a clearer comparison experience and helps customers make a decision without having to decipher which services or pricing belong to which option.

Before



SERVICE CONTRACT

Acme Home Services Plano
1500 E Plano Pkwy
Plano, TX 75074
(972) 555-0199
bobsvideotutorials@gmail.com
https://getserviceminder.com/

Acme Home Services

Billing Address
Amanda Anderson
1500 East Plano Parkway
Plano, TX 75074
(123) 656-8120 (Mobile)
amanda.anderson@serviceminder.co

Service Address
Amanda Anderson
2400 Eldorado Pkwy
Little Elm, TX 75068
(123) 656-8120 (Mobile)

Date	September 10, 2026
Total	$337.00

This Service Contract expires on 12/9/2026

View

Please review and select one proposal from the bundle before accepting:

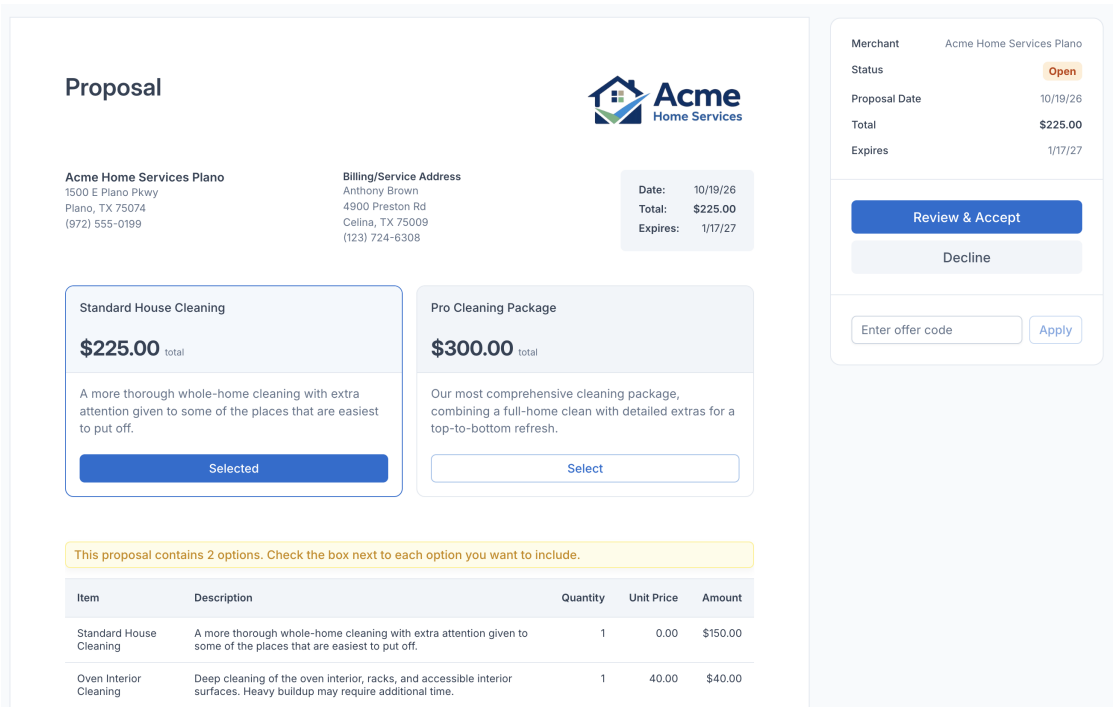
Essential Cleani...
Our most comprehensive cleaning package, combining a full-home clean with detailed extras for a top-to-bottom refresh.
$337.00
Select

Pro Cleaning Pa...
Our most comprehensive cleaning package, combining a full-home clean with detailed extras for a top-to-bottom refresh.
$509.00
Select

This proposal contains 2 options. Be sure to click the checkboxes below for the options you want to include.

Item	Description	Qty	Rate	Amount
Standard	Our most comprehensive cleaning package, combining a	1	0.00	$175.00

After



Proposal

Acme Home Services

Acme Home Services Plano
1500 E Plano Pkwy
Plano, TX 75074
(972) 555-0199

Billing/Service Address
Anthony Brown
4900 Preston Rd
Celina, TX 75009
(123) 724-6308

Date: 10/19/26
Total: $225.00
Expires: 1/17/27

Merchant: Acme Home Services Plano
Status: Open
Proposal Date: 10/19/26
Total: $225.00
Expires: 1/17/27

Review & Accept
Decline

Enter offer code
Apply

Standard House Cleaning
$225.00 total
A more thorough whole-home cleaning with extra attention given to some of the places that are easiest to put off.
Selected

Pro Cleaning Package
$300.00 total
Our most comprehensive cleaning package, combining a full-home clean with detailed extras for a top-to-bottom refresh.
Select

This proposal contains 2 options. Check the box next to each option you want to include.

Item	Description	Quantity	Unit Price	Amount
Standard House Cleaning	A more thorough whole-home cleaning with extra attention given to some of the places that are easiest to put off.	1	0.00	$150.00
Oven Interior Cleaning	Deep cleaning of the oven interior, racks, and accessible interior surfaces. Heavy buildup may require additional time.	1	40.00	$40.00

Accepting a Proposal: The Guided Flow

Proposal acceptance now follows a guided sequence:**Payment option (plan) → Documents → Communication preferences → Signature → Payment method.**



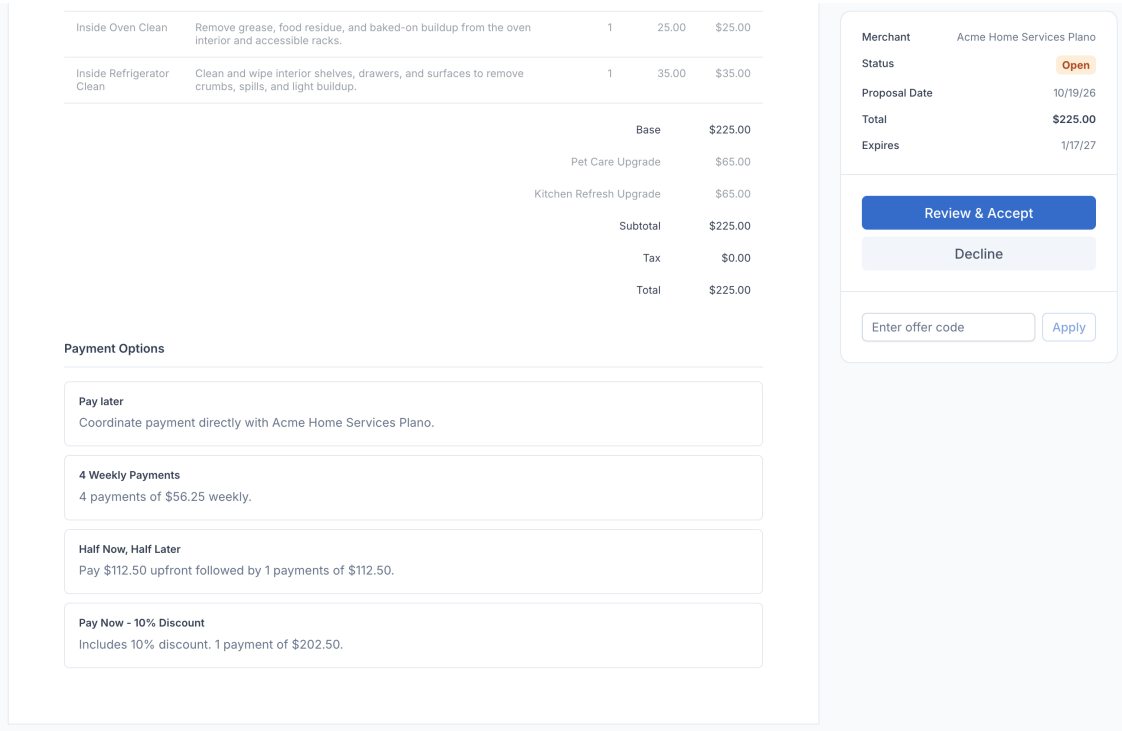
Before customers start, the proposal lists its payment options (such as Pay later, Add deposit, and any payment plans) below the totals, so they can see what they'd owe up front. The Accept button reads **Review and Accept.**

A right-hand action rail stays visible as customers scroll through the proposal, including on longer pages. It provides access to Accept, Decline, and Request changes, so customers don't have to scroll back to the top to find their next action.

Declining or requesting changes does not automatically close out the proposal. The proposal remains in its current state, allowing your team to follow up as needed.

Choose a Payment Option (if present)

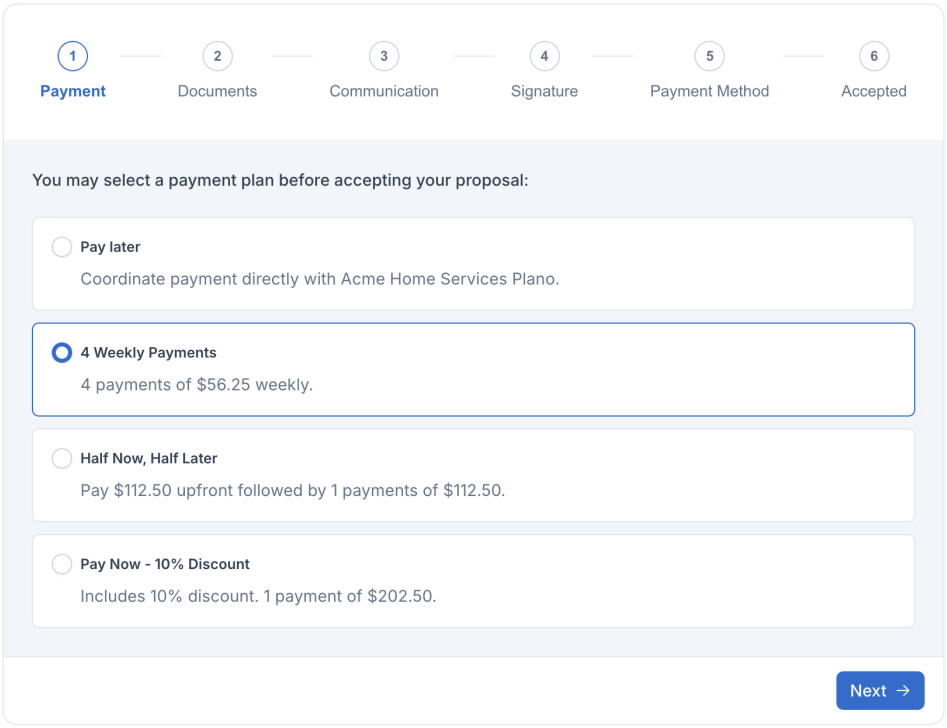
If the proposal offers payment plans they will be displayed in below the pricing in the **Payment Options** section. Choosing one will be the first step after clicking **Review & Accept**. Customers choose between Pay later, Add deposit, and any payment plans the proposal includes. The same options are listed below the totals before the customer starts, so the amount is visible early.



If the proposal requires a deposit, payment, or card on file, the customer is guided through the appropriate payment choices based on how the proposal is configured.

If a deposit is optional, customers see a clear choice between **Pay later** and **Add deposit**.

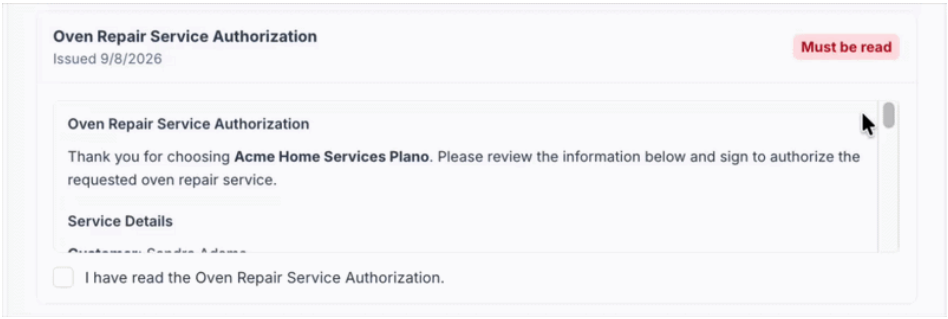
- Choosing **Pay later** skips payment entry entirely
- Choosing **Add deposit** or selecting an available payment plan will result in them being prompted to enter their payment information at a later step.



Review Documents (if present)

If a document or form is attached to the proposal, such as an inspection form or disclosure, it appears inline in its own scrollable container. Customers can review it directly on the proposal page instead of opening a separate browser tab.

The customer must scroll through the document and check a box confirming they have read it. The indicator changes from **must be read** to **read** once confirmed.



The signature block then becomes available below, where customers can draw using a mouse or finger before clicking a button that directly indicates how many forms they are signing (i.e., **Sign 2 Forms**).

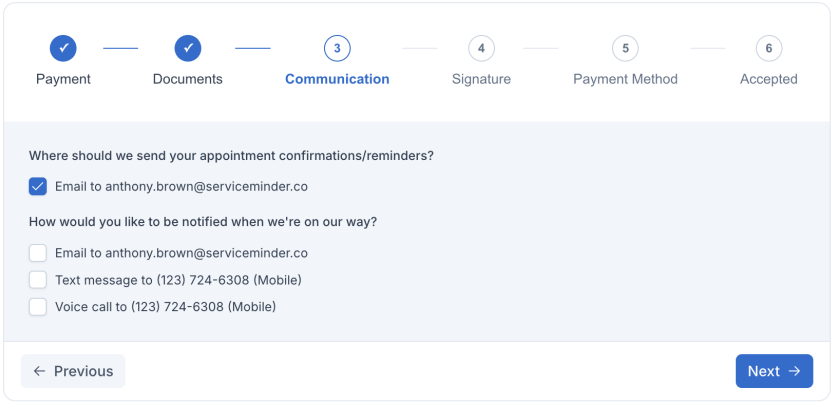
The **Next** button remains becomes available once both the read-confirmation and signature requirements are complete.

> If the proposal has no attached documents or forms, the process skips ahead to Step 2 - Confirm Communication Preferences.

Confirm Communication Preferences

Communication preferences are now presented as an explicit step in the acceptance flow.

Customers can review and confirm their email and text notification preferences for appointment confirmations/reminders and en route notifications (when you're on your way to the appointment).

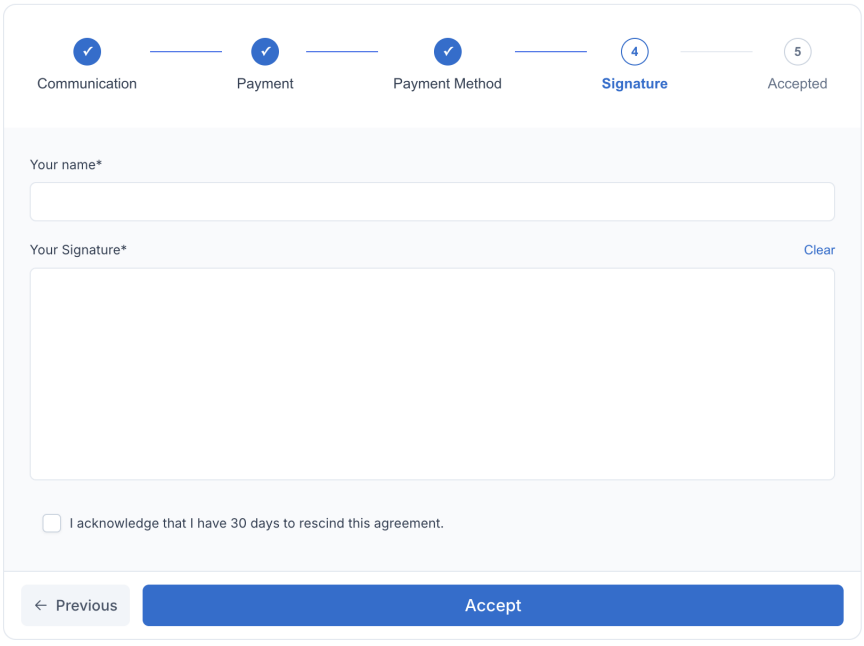


There is nothing new your team needs to configure just to use this step. It brings the existing preference experience into the same guided process as proposal acceptance.

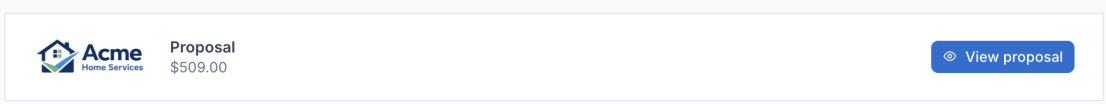
Signature

The next step is to sign and accept the proposal. The customer enters their name, then uses a mouse or finger to draw their signature in the box provided.

Before selecting **Accept**, the customer must also check the box acknowledging the rescission terms.

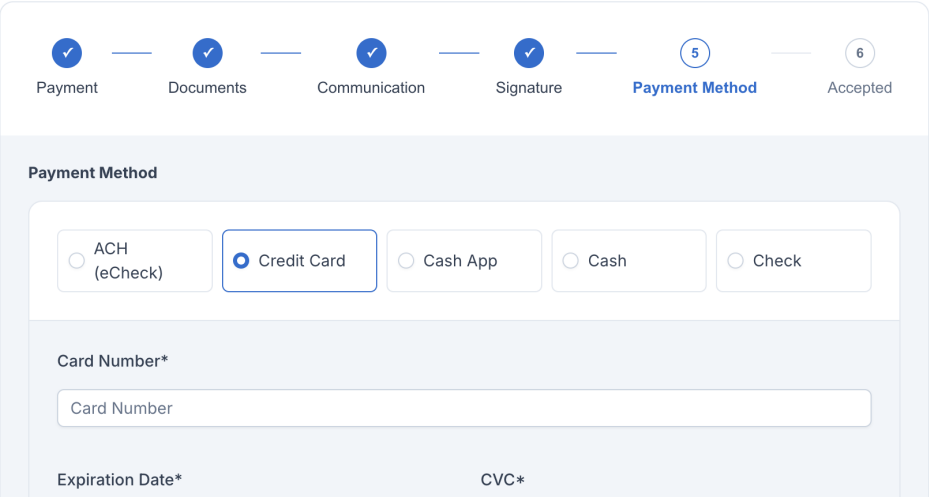


At any point before accepting, the customer can select **View Proposal** to return to the proposal and review the details of what they're agreeing to.



Payment Information (if required)

Customers will then see the payment methods your organization has enabled, such as card, check, or other supported options.



If they choose a payment method that takes place outside of the ServiceMinder system, like check or cash app, the payment information fields go away and the action button reads **Next**, making it clear that payment is not being processed online at that moment.

If the proposal requires a **card on file** but no payment is due, the option to **Add payment method** will display, indicating that the payment information will be saved for future payments. In that case, the customer simply saves their card and accepts the proposal; nothing is charged that day.

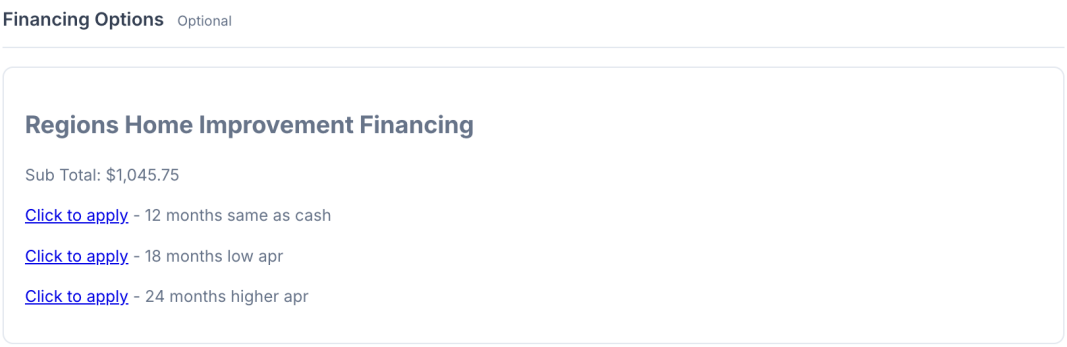
If no deposit and no card on file are required, this step is skipped entirely.

If your organization uses ServiceMinder Pay and has enabled digital wallets, customers can pay a deposit with Google Pay or Apple Pay when their device and browser support it. **Wallet options will only appear when a customer is paying a single deposit, not when using a payment plan or adding a payment method**, due to the restrictions of saving a digital wallet payment on file.

Learn more in New Ways to Pay: Apple Pay, Google Pay, and Scan to Pay

Financing

If your organization has financing configured, Financing Ooptions directly below the proposal.



Financing is not presented as another step in the acceptance flow or as a payment-method option. Instead, the customer can open the lender's application in a new tab and return to the proposal afterward.