Tips and Gratuities

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Overview

Many businesses have service agents who will potentially receive a tip from a customer. Make it easy for that customer to leave a tip via service **minder** payments when they are short on cash!

This article will review:

- Manually Adding Tips on Appointments
- Sending a Tip Link
- Reporting
- Quickbooks Online Sync
- Troubleshooting

If you have credit card surcharges turned on in your service**minder** account, your customer will *not* be able to pay a tip with a credit or debit card. Several states forbid surcharges on gratuities. E-Check (ACH) is the *only* option when credit card surcharges are in place.

Tips cannot be set to automatically charge, even at the customer's request.

Video Tutorial

Your browser does not support HTML5 video.

Manually Adding Tips on Appointments

While using the web version, the **Add Tip** icon is on the dark blue bar at the base of the appointment details page/screen:

Details								
Item	Description					Qty	Rate	Amount
Installation	System insta	Illation, as de	esigned.			1	\$500.00	\$500.00
		٩	5	•				
	Email	Print	Add Deposit	Add Tip	Invoice	Send	Сору	

Click that icon to manually record a tip. A tip can be accepted at any time, even *prior* to the appointment. For example, if Mrs. Jones is going out of town, but wants to leave a tip in advance for the cleaners, it's easy to accomplish.

Accept Tip								
Payment Method*	Cash							
Amount*	25							
Date*	7/12/2024							
Reference								$\boldsymbol{\lambda}$
		-						Save Cancel
Queued Appointment		Print Move Edit Cancel Delete	Additional [Details				Timeline
Service Installation	ı		Map Notes (0) Pictures	Videos Audi	s Forms	Checklists	
Queued for Tuesday, Ju Original Date Fri, Jul 12, 2	uly 16 Confirmed		+ m/ Mar	EXECUTIV Satellite	E PARK	Hospita	al, A Thrive Pet	4000 E

Click save and you'll see the tip amount appear on the appointment screen:

Last Updated	7/12/2024 11:54a
Sync Events	View
Total	\$500.00
7/12/2024 Tip	\$25.00 Cash (Pmt 7/12/2024) 🗙
Margin	100% <u>Edit</u>
Expenses	Add

Accidentally enter in the wrong amount? Customer changed their mind at the end of an appointment? Click the "X" next to the tip to delete it.

7/12/2024 Tip \$25.00 Cash (Pmt 7/12/2024)

Sending a Tip Link

Another option is to include an easy Tip button in your appointment-related communications.

Use the shortcode **{appointment.tip_url}** in appointment-type templates to allow your customers to tip using eCheck or Credit Card.

Insert this shortcode in a drip text to send after an appointment or in an email asking for a review. The possibilities are endless! When your customer clicks on the link - they will be taken to a page that look like this:

	ТІР	
Bob's Handyman - Plano 3308 Preston Rd 350 232 Suite 350-232 Plano, TX 75093 (860) 786-4121 Lic # 56789PQR serviceminder.com Your appointment total was \$2,405.00		bob's handyman
10% 15% 20% \$240.50 \$360.75 \$481.00	25% \$601.25	
Tip Amount 481.00		
●eCheck ○Credit Card		
Routing Number		

The tip screen offers a variety of percentages, with 20% being the default or the customer can enter a custom tip

amount.

Reporting

Tips have their own report in serviceminder. Go to Reports and look towards the bottom of the page.

☆ <u>Reworks</u> Track appointment reworks.	☆ <u>Route Schedules</u> Route schedule performance.	☆ <u>Sales Team Tracking</u> Track sales activities grouped by users.
☆ <u>Service Agent Inventory</u> Show part inventory based on service agent quantities.	☆ <u>Services Summary</u> Appointment services summary report with counts, average scheduled and actual durations.	☆ <u>Tips</u> Tips received within a date range.
☆ <u>Transaction Auditing</u> Auditing report for common exceptions like orphan invoices.		

This report provides you with a clear picture of who tipped, how much, when, and which agent(s) the tip was for.

While viewing the Tips Report, you can limit the date range that is displayed and filter by several categories. To update the date range, set the start and end date, then click the refresh button.

Tip Report From 07/01/2022 Through 7/12/2024					C 🛃		
X Owner ▼	X Categories 1	🔻 🗙 Tags 🔻 🗶 GeoZ	iones 🔻 🗙 Scheduled Start 🔻 🗙 Status 🔻 🗶 Services 🔻 🗶 Parts	▼ X Service Agents ▼	Add Reset		
Date	Amount	Payment Method	Contact Name	Appointment Date	Service	Service Agents	Service Agent Count
5/25/2023	\$5.00	Check	<u>Thomas Tomato</u>	5/10/2023	Carpet/Tile Cleaning	Team 2 Agent Test	1
<u>12/13/2023</u>	\$1.00	Card on File	Lilly Lemons (Key 45) - RaggaMuppets Tails and Feathers	8/11/2023	Recurring Service with promo pricing	Avis Agent, John Keene	2
5/25/2023	\$20.00	Card on File	Lilly Lemons (Key 45) - RaggaMuppets Tails and Feathers	5/23/2023	Recurring Service with promo pricing	barney agent	1
<u>5/5/2023</u>	\$25.00	unknown	J <u>oe Delate</u>	5/5/2023	Installation	Joe Smith	1
<u>5/25/2023</u>	\$5.00	Cash	<u>Conway Dreams</u>	5/10/2023	Installation	Jane Subcontractor,Justin Herzog	2

QuickBooks Online Sync

Tips are easily synced from service**minder** to QuickBooks Online. QuickBooks records tips via **Sales Receipts**, which is not part of serviceminder (we use Invoices), so Tips are sent to QuickBooks as a \$0.00 value Sales Receipt.

ales Receipt #16						🛞 🕐 Help
et method Reference no.	Deposit to Undeposited Funds					
# SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	atr	RATE	AMOUNT	тах
1 1	Installation	Basic system installation. Includes one year parts and labor warranty.	1	0	0.00	8
2						8
Add lines Dear all lines					Subtotal	\$0.00
nege displayed on sales receipt				41 Disco	Int percent • Taxable subtotal	\$0.00
sage displayed on statement				Cartor	Тр	1.00
					Total Amount received	\$1.00
					Balance due	\$0.00
Attachmenta Maximum size: 2048						
Drag/Drop Res here o	r click the icon					

To sync tips, you must go to your QuickBooks Account Settings and toggle Accept Tips on.

npany	Customize	Customize the way forms look to your customers	Customize look and feel
ing & subscription	Sales form content	Preferred invoice terms ①	Net 30
		Preferred delivery method ③	Print later 💌
		Shipping 🕥	
penses		Custom fields ③	On
ments		Name Internal Public	
me			
d and a state of the state of t			
vanceo		Custom transaction numbers ①	
		Service date ①	
		Discount ①	
		Deposit ①	
		Accept tips ①	
		Tags ()	

Troubleshooting

When leaving a tip, customers are adding their credit card information but they don't want it saved. Currently, it saves and replaces the card on file. How do I make it not save?

To make card on file optional go to **Control Panel > Integrations > Payments** and check the box for "Card on File Optional."

We want to just be asking tips from our residential customers and want to also make sure it was a pleasant successful visit before we send that tip text/email out. What would be the best way to do this?

A couple ways this can be done. One is to include the link on the ad hoc email template that is sent out with the invoice link. You can even set up two versions of this email template - one with the Tip Request link and one without. Then you can apply the appropriate template when approving the invoice to determine which version is sent to the customer.

The link is **{appointment.tip_url}** and it can be added to an existing email template, or in a new one. The same link can be included in a text message to the customer.

The second would be just sending an email or text specifically requesting a tip after an appointment. For this, we would suggest reaching out to your brand team for further guidance on setting up that type of ad hoc email. But basically, the same link would just be sent out in a separate email or text directly to the customer after an appointment has been completed.

Before requesting tips, you do need to make sure Accepting Tips is turned on in your QuickBooks account. In QuickBooks, go to **Settings > Sales >** make sure **Accept Tips** is toggled on and Save. (Please note that if you have surcharging turned on for CC payments, there may be additional rules to accepting tips via CC based on your state. It does not appear that this is turned on in your account as of right now.)