Tips and Gratuities

09/09/2025 12:02 pm CDT

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.

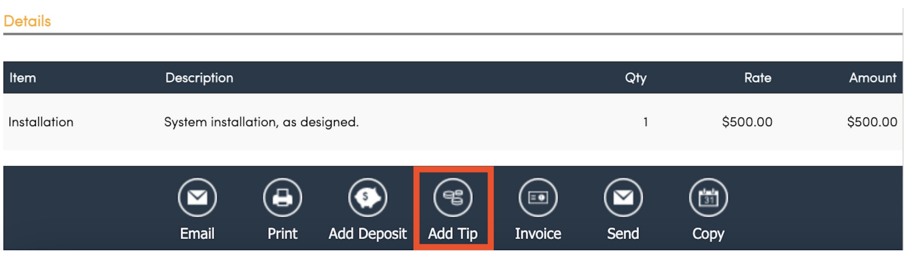
Tips cannot be set to automatically charge, even at the customer's request.

Video Tutorial

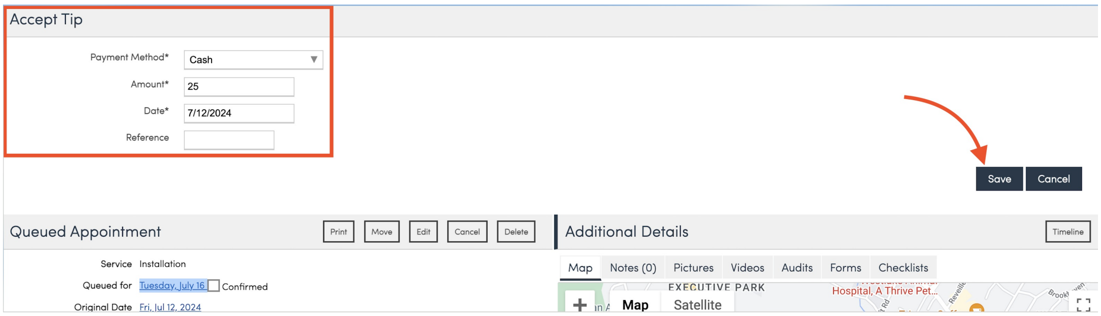
Your browser does not support HTML5 video.

Manually Adding Tips on Appointments

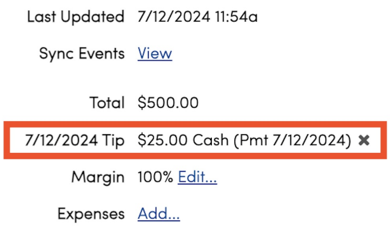
While using the web version, the **Add Tip** icon is on the dark blue bar at the base of the appointment details page/screen:



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.



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



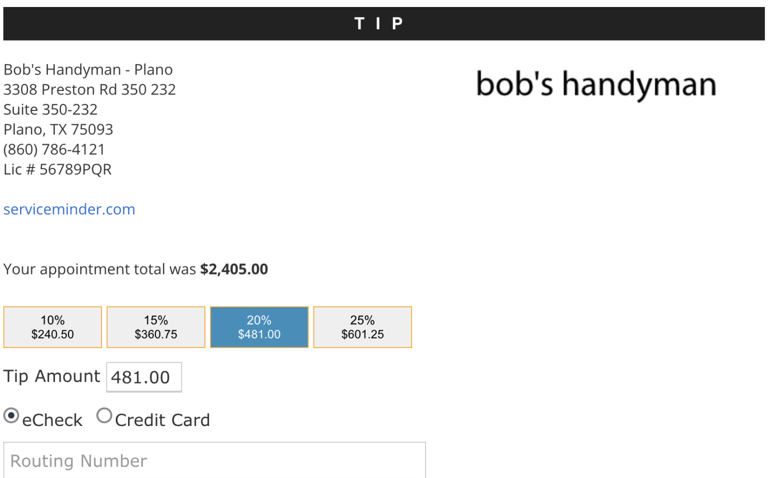
Accidentally enter in the wrong amount? Customer changed their mind at the end of an appointment? Click the "X" next to the tip to delete it.

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.

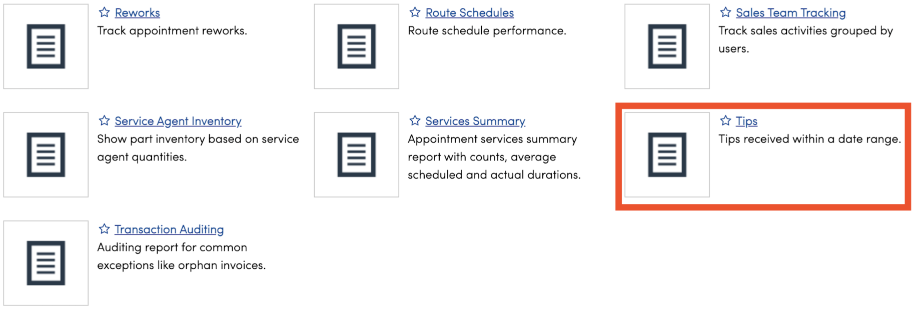
Insert this shortcode in a drip text to send after an appointment or in an email asking for a review. The possibilities are endless! When your customer clicks on the link - they will be taken to a page that look like this:



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

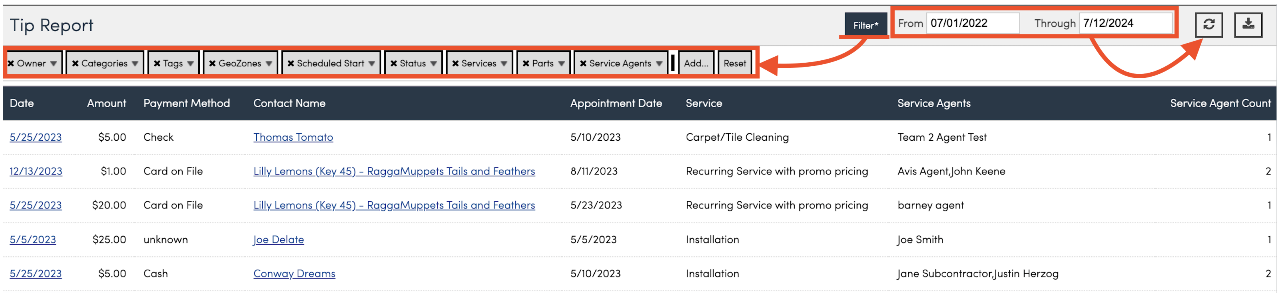
Reporting

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



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

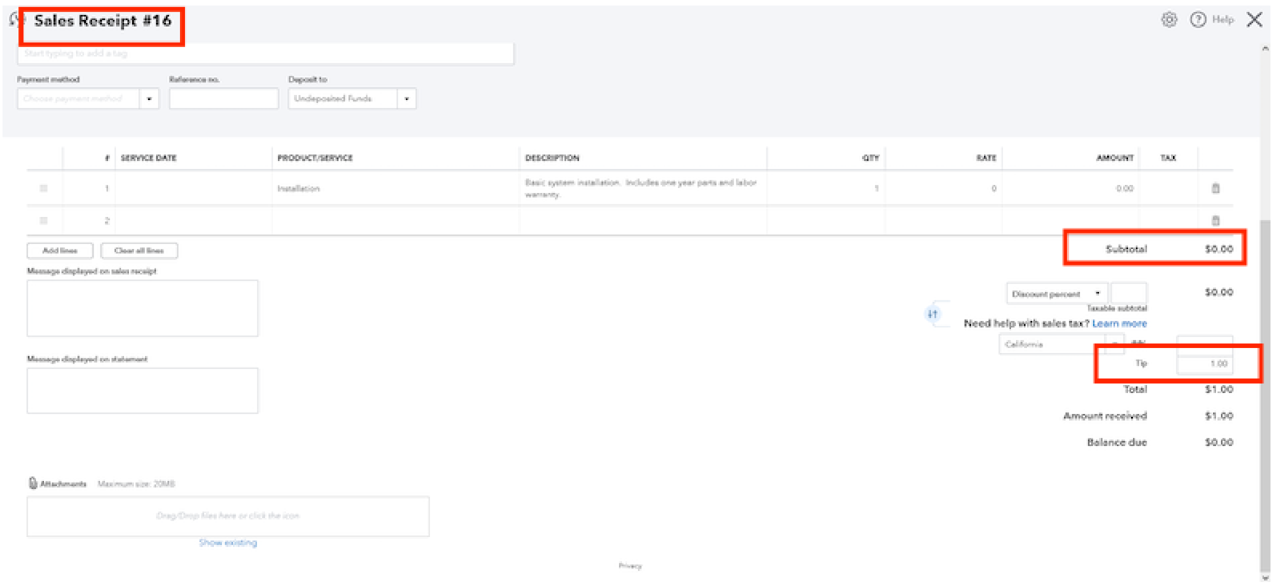
While viewing the Tips Report, you can limit the date range that is displayed and filter by several categories. To update the date range, set the start and end date, then click the refresh button.



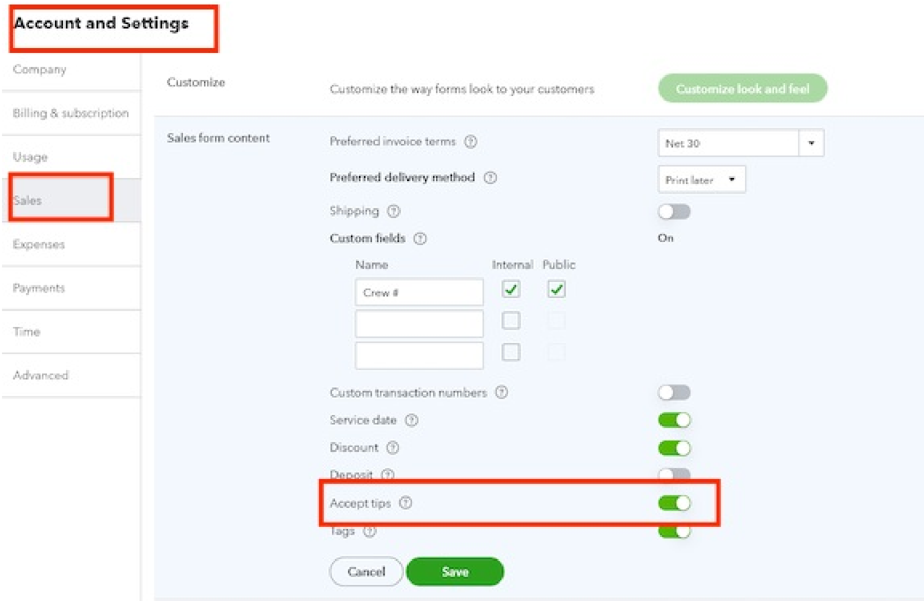
Date	Amount	Payment Method	Contact Name	Appointment Date	Service	Service Agents	Service Agent Count
5/25/2023	$5.00	Check	Thomas Tomato	5/10/2023	Carpet/Tile Cleaning	Team 2 Agent Test	1
12/13/2023	$1.00	Card on File	Lilly Lemons (Key 45) - RaggaMuppets Tails and Feathers	8/11/2023	Recurring Service 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
5/5/2023	$25.00	unknown	Joe Delate	5/5/2023	Installation	Joe Smith	1
5/25/2023	$5.00	Cash	Conway Dreams	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.



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



Troubleshooting

Q: 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?

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

Q: 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: 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.)

Q: Do tips show up on the royalty report (End of Week and/or End of Month report)?

A: Tips are not included in the revenue totals used to calculate royalties owed to the franchisor. The royalty reports are designed to capture sales revenue from services and parts, not gratuities.

Q: Are taxes charged on tips?

A: No, tips are managed as separate line items and are not included in the calculation of sales tax on invoices or receipts. This aligns with standard accounting practices, as tips are considered gratuities and not part of the taxable sale of goods or services.