

Service Settings: Invoicing Mode

02/02/2026 10:04 am CST

Overview

Invoicing Mode settings determine **how and when invoices are created from your services** in serviceminder. Each service can be configured with both a **Finish Action** (what happens when an appointment ends) and an **Invoicing Mode** (how proposals tied to that service generate invoices). Together, these options give you flexibility to handle one-time jobs, prepaid services, multi-appointment projects, or custom billing workflows.

This article explains where to find these settings, how they behave for direct-scheduled versus proposal-scheduled services, and what each invoicing mode means in practice.

This article will review:

- [Settings and Navigation](#)
- [Direct-Scheduled Services](#)
- [Proposal-Scheduled Services](#)
- [Invoicing Mode Details](#)
- [Auto Pay & Consolidate Payments](#)
- [Additional Invoicing Settings](#)
- [FAQs](#)

Settings and Navigation

In **Control Panel > Services**, when editing a service you can configure an **Invoicing Mode**. Navigate to the **Invoicing** section of the service's settings page.

Here you will find two dropdown menus that control automations for that service:

1. Finish Action: What happens when the appointment is finished?

2. Invoicing Mode: How is the proposal invoiced?

The screenshot shows the 'Edit an Existing Service' page. On the left is a navigation menu with options: General, Messaging, Printing, Scheduling, Self Service Scheduling, and Invoicing (which is highlighted). The main content area is titled 'Invoicing' and contains the following settings:

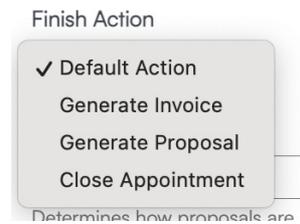
- Finish Action:** A dropdown menu set to 'Default Action'.
- Invoicing Mode:** A dropdown menu set to 'Via Appointments'. Below it is the text 'Determines how proposals are invoiced'.
- Automatically mark appointment-generat**

We will review these two settings as they apply to two scenarios: services that you schedule directly and services that you schedule from a proposal.

1. **Direct Schedule** = From the contact details page click the “schedule” button
2. **Proposal Schedule** = From the proposal click the “schedule or add appointment” button

Direct-Scheduled Services

Appointments scheduled directly (without a proposal) will disregard the **Invoicing Mode** and rely in the **Finish Action** for what to do when the appointment is completed.



Finish Action choices are as follows:

- **Default Action:** Uses default serviceminder flow. If the appointment is for more than zero dollars or has any line items, an invoice will be generated.
- **Generate Invoice:** Creates an invoice when the appointment is finished.
- **Generate Proposal:** Takes you to the create a proposal page when the appointment is finished (typically used for estimate type appointments).
- **Close Appointment:** Closes out the appointment. No invoice is generated.



If you choose **Close Appointment**, this service will not be available to select when creating a Proposal. This option is meant only for appointments you will be direct scheduling.

Proposal-Scheduled Services

When you follow the **Proposal Schedule** method (schedule the appointment(s) from the proposal) serviceminder uses both the **Finish Action** selection AND the **Invoicing Mode** selection.



For services that are scheduled from the proposal, the **Finish Action** options can *only* be **Default Action** or **Generate Invoice**.

From the **Invoicing Mode** dropdown menu, choose how/when you want the invoice to be generated.

- **Via Appointments** - automatically adds proposal lines to the appointments, creates an invoice at the end/finish of each appointment
- **Proposal Accept** - automatically creates an invoice when the proposal is accepted – ONLY creates the invoice if a payment is received as part of the Online proposal accept method
- **Project Complete** - automatically creates the invoice when the project is completed this setting is connected to another setting for proposal completion mode. Control Panel > Proposals. Proposal Completion Mode setting determines when the proposal is considered 100% complete.

- **Manual** - does not automatically create an invoice, allows you to manually create the invoice when you determine its time.
- **Via Appointments with Carry Forward** - automatically adds proposal lines to the appointments, when there is more than one appointment on the proposals, line items from the first appointment automatically move to the next appointment and continues this process until the last appointment is completed then upon finish automatically creates invoice.

Invoicing Mode

- ✓ Via Appointments
- Proposal Accept
- Project Complete
- Manual
- Via Appointments w/ Carry Forward

Invoicing Mode Details

A service's **Invoicing Mode** determines how and when invoices are generated. There are 5 modes to choose from:

Invoicing Mode	Description
Appointments (Default)	<ul style="list-style-type: none"> • Proposal lines are added to the first scheduled appointment. • When the appointment is completed, lines on the appointment will generate an invoice. • Best for services delivered in a single appointment.
Proposal Accept	<ul style="list-style-type: none"> • Invoice is generated when a proposal is accepted or scheduled <i>and</i> a deposit is on the proposal at the time of acceptance. • <i>Note: If there is not a deposit on the proposal when the proposal is accepted or scheduled, the invoice will not generate automatically and will have to be created manually from the proposal.</i> • Best for subscriptions or prepaid services.
Project Complete	<ul style="list-style-type: none"> • When the final appointment attached to the proposal is finished, the invoice will be generated from the proposal automatically. • Appointments will default to \$0 with no lines (no invoice will be generated directly from the appointments). • Best for multi-appointment projects (e.g., construction jobs).
Manual*	<ul style="list-style-type: none"> • No invoices will be automatically generated. • Generate the invoice manually from the proposal when you are ready. • Best for projects needing flexible invoicing.
Appointments (with Carry Forward)	<ul style="list-style-type: none"> • Proposal lines are placed on the first appointment. • As each appointment is completed, lines and pricing move to the next until the final appointment, when an invoice is generated. • Unlike Project Complete, the lines move with each appointment.

*If you use Dispatch (Dojo), or a call center that handles all of your scheduling, Manual Invoicing Mode may not be the right fit for you. Proposal line items will need to be copied over when scheduling. That process would look like this:

1. Click "Schedule an Appointment"
2. Then select Import next to the part search bar.
3. Fill out the service line pricing (if applicable)

Auto Pay & Consolidate Payments

If you want to be able to specify a day of the month to process the credit card payment for a set of invoices you can do that with this setting. Go to **Control Panel > Invoicing** and check the box **Consolidate Payments**.

On your service (**Control Panel > Service**) the check box **Auto Pay Upon Complete** also has to be checked. Once these two settings are on, you can go to the Contact create/edit pages and it will allow you to specify which contacts should have their payments consolidated.

Additional Invoicing Settings

Automatically mark appointment-generated invoices as unapproved

Automatically invoice appointments on day of or Auto Invoice Offset days before

Auto Invoice Offset

day(s) before appointment

If Auto Invoice is enabled above, sets the number of days before an appointment to create the invoice and charge the payment

Auto Pay When Complete?

If enabled, invoices will be paid automatically when appointments are completed if the contact has a credit card on file.

Setting	Description
Automatically mark appointment-generated invoices as unapproved	Check this box if you want to review and approve all invoices generated from appointments with this service type.

Setting	Description
Automatically invoice appointments on day of or Auto Invoice Offset days before	<p>Check this box to create invoices automatically on the day of the appointment, or a set number of days before the scheduled date.</p> <p>This is an important setting because it can override other configurations—like when Invoicing Mode is set to Manual or when an appointment is Auto Marked Closed. It will also generate an invoice with an installment payment even if Auto-Pay isn't enabled for the service.</p> <p>If the contact has a card on file, this will automatically charge the contact the morning of the appointment.</p>
Auto Invoice Offset	If you have checked the box to Automatically Invoice Appointments, you can set how many days before the appointment that the invoice will be created and charged.
Auto Pay When Complete?	If enabled, invoices will be paid automatically when appointments are completed if the contact has a credit card on file.

FAQs

I made changes to Service Mode settings but all my proposals haven't changed to reflect.

Changes made to master proposal settings in the Control Panel will apply to newly generated proposals moving forward. If a proposal was created before the update, it will still have the original settings. You can individually update any open proposals created before that update to be the correct proposal invoicing mode.

When viewing the proposal, click **Settings** at the top and set the invoicing mode there:

Proposal

Accept Decline Schedule View Print Edit **Settings**

Proposal Settings

Project?

Track as project

Invoicing Mode
Manual

Summarize Pricing

Summarize pricing

Extra Signature

Allow for an extra signature to be taken when the contact accepts this proposal online

Target Date

What if I prefer to manually approve all invoices but I use a call center. What is the right solution for me?

In **Control Panel > Invoices**, configure your settings as follows:

- Set the **Invoicing Mode** to **Via Appointments**

- **Enable Mark Invoices Unapproved**
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