# Service Settings: Invoicing Mode

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#### **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:

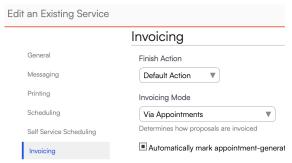
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## **Settings and Navigation**

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?



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

#### **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 service **minder** 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) service**minder** uses both the **Finish Action** selection AND the **Invoicing Mode** selection.



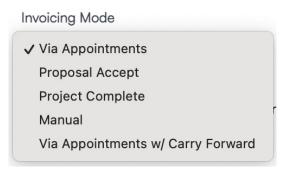
For services that are scheduled from the proposal, the **Finish Action** options can *only* be **Default Action** or **Generate Invoice**.

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 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> <li>Proposal lines are added to the first scheduled appointment.</li> <li>When the appointment is completed, lines on the appointment will generate an invoice.</li> <li>Best for services delivered in a single appointment.</li> </ul>
Proposal Accept	<ul> <li>Invoice is generated when a proposal is accepted or scheduled and a deposit is on the proposal at the time of acceptance.</li> <li>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.</li> <li>Best for subscriptions or prepaid services.</li> </ul>
Project Complete	<ul> <li>When the final appointment attached to the proposal is finished, the invoice will be generated from the proposal automatically.</li> <li>Appointments will default to \$0 with no lines (no invoice will be generated directly from the appointments).</li> <li>Best for multi-appointment projects (e.g., construction jobs).</li> </ul>
Manual*	<ul> <li>No invoices will be automatically generated.</li> <li>Generate the invoice manually from the proposal when you are ready.</li> <li>Best for projects needing flexible invoicing.</li> </ul>
Appointments (with Carry Forward)	<ul> <li>Proposal lines are placed on the first appointment.</li> <li>As each appointment is completed, lines and pricing move to the next until the final appointment, when an invoice is generated.</li> <li>Unlike Project Complete, the lines move with each appointment.</li> </ul>

\*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**.

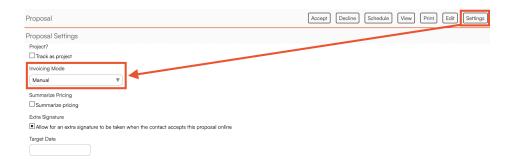
On your service (**Control Panel > Service**) the check box **Auto Pay Upon Complete** also has to be checked. Once these to settings are on, you can go to the Contact create/edit pages and it will allow you to specify which contacts should have their payments consolidated.

### **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:





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

- Set the Invoicing Mode to Via Appointments
- Enable Mark Invoices Unapproved