Service Settings: Invoicing Mode
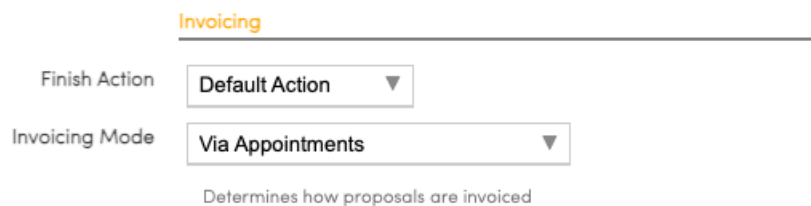
12/20/2024 9:44 am CST

Overview

In the **Invoicing** section of a **Service** (**Control Panel > Services > Edit** or **Add**) there are two drop downs that control automations for that service:

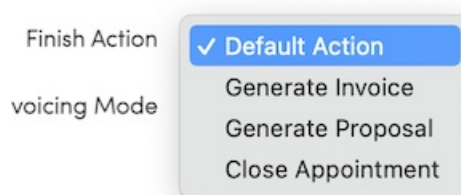**1. Finish Action**

2. Invoicing Mode

To understand these two settings let's start with the appointment. There are two ways to schedule an appointment:

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

The method you choose to schedule the appointment directly affects which invoice setting service**minder** uses.

For Services That You Direct Schedule

When you **Direct Schedule** an appointment we use the service settings **Finish Action** to determine what you want to happen at the end of that appointment. (a.k.a when you hit the **Finish** button when working an appointment).

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.
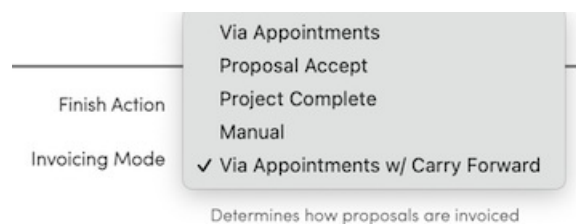
For Services That You Proposal Schedule

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.

In this method the Finish Action options can*only* be **Default Action** or **Generate Invoice**.

Next from the Invoicing Mode drop down you 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.

Finish Action

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

Invoicing Mode

Determines how proposals are invoiced

Invoicing Mode Details

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

1) Appointments

This is the default invoicing mode. When you have a proposal and schedule it, the lines for the appointment will be

added to the first appointment scheduled. Then when the appointment is completed, those lines (plus any updates) are then added to the invoice that is generated. This mode is best for cases where the appointments to deliver the service tend to be self contained - it only takes a single appointment to deliver all of the service.

2) Proposal Accept

This mode is used when you want to invoice for the service up front, when the client accepts or schedules the proposal. An example of this service may be for subscription type services where you want to offer a subscription-level discount and they can then pay up front, possibly for a discount. You could also use Payment Plans to spread the actual payments out across the service delivery schedule but the invoice will still be generated up front.

> 🔔 Please note that an invoice will only automatically generate if a deposit is made at the time of acceptance. If no deposit is made, or the deposit is made after the fact, the invoice will have to be manually generated from the proposal. This can be done by clicking the Invoice button in the toolbar at the bottom of the proposal details page.

3) Project Complete

This mode is used for more project-oriented workflows where you have a single proposal but the service is then delivered across a large number of appointments. Examples of this would be construction or remodeling. When a proposal's service is set to this mode, you'd schedule appointments as normal but the individual appointments all default to no lines and are free. Then, when the last appointment on the proposal is finished, an invoice is generated from the proposal.

4) Manual

This mode is also for project-oriented workflows but it is designed to allow you to do the invoices as needed, rather than when specific appointments are completed. For example, with construction or remodeling workflows, you may generate multiple invoices and those invoices may represent specific progress on the project. When the final invoice is completed, no invoice is generated automatically.

> 🔔 If you use Dojo, or a call center that handles all of your scheduling, this 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. then hit Schedule

2. then hit Import

3. they'll also have to fill out the service line pricing (if it has any pricing)

Option	Item	Description	...
Select a template... ▼	Bug Service ▼	A service specifical_ ☐ Taxable | ✏	
-option-	-part-	Search... | Import...	--Select one--

5) Appointments with Carry Forward

This mode will place the lines on the appointment when you hit **Schedule** on a proposal. When you hit **Add Appt** on the proposal, the additional appointments will have the same service but all be $0 and have no lines. When the first appointment is completed, the lines and pricing will move to the next appointment on the proposal. When the last appointment is completed, it will then generate an invoice.

This is different than **Project Complete** mode in that the lines and pricing move with the appointments rather than only living on the proposal itself.

Auto Pay Upon Complete & 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.

FAQ

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

Any proposals created after the services were updated should be correct. If the proposal was generated before the services were updated to no longer be manual invoicing, it will still have the original settings. You will want to update any open proposals created before that update to be the correct proposal invoicing setting.

 When viewing the proposal, hit **Settings** at the top, and set the mode:

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

If you are an Owner that likes to manually approve invoices before they go out, the solution would be to make the Invoicing Mode for your Services "Via Appointment" but turn on **Mark Invoices Unapproved**, so you have to review and approve each of them before they are sent out.

It will look like this:

I made a change to the Invoicing Mode but all the open/accepted Proposals aren't following the new settings.

You may need to edit the open or accepted proposals separately. The Invoicing Mode may only affect new proposals created. To edit existing proposals, click **Settings** on the proposal and switch the invoicing mode to whatever you need it to be.
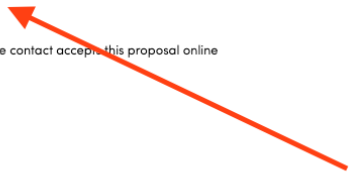
Proposal Settings

Project?	☐ Track as project
Invoicing Mode	Via Appointments ▼
Summarize Pricing	☐ Summarize pricing
Extra Signature	☐ Allow for an extra signature to be taken when the contact accepts this proposal online
Target Date	

Proposal

[Accept] [Decline] [Schedule] [View] [Print] [Edit] [Settings] [Unsubscribe] [Delete] [Timeline]

Fred the Gardener ✏
815 Cunningham Ln
Saint Albans, WV 25177
(000) 000-0000
Confirmation

Status Open
Owner Heather Gatlin ✏
Proposal Date 5/3/2024
Expires On 8/1/2024
Next Reminder None

Proposal Settings

Project?	☐ Track as project
Invoicing Mode	Via Appointments ▼
Summarize Pricing	☐ Summarize pricing
Extra Signature	☐ Allow for an extra signature to be taken when the contact accepts this proposal online
Target Date	