Deposits on Proposals

09/29/2025 10:39 am CDT

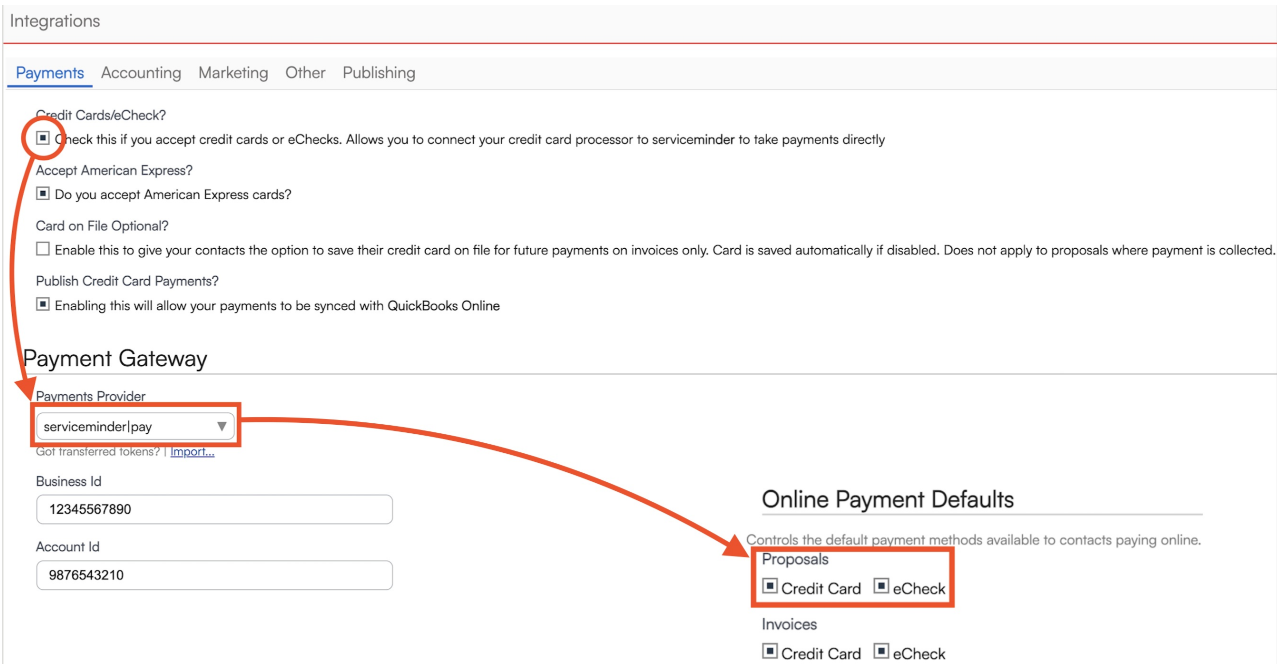
Overview

If you have a payment processor connected in your service**minder** account, you can take deposits on your proposals and appointments.

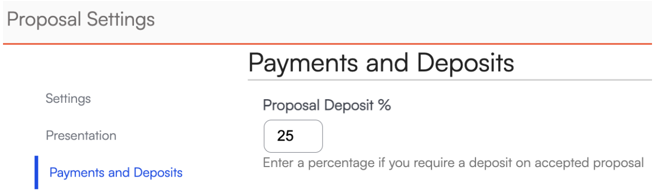
This article will review:

Settings and Navigation

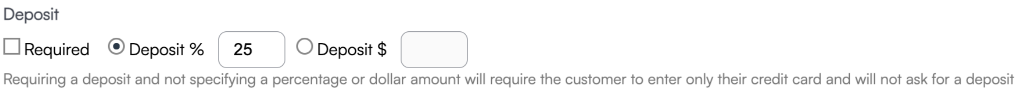
First, you need to make sure you have your payment provider integration set up and active. Go to **Control Panel > Integrations > Payments** to verify that you have your payment provider information entered and all payment related configurations are set to meet your needs.



Next, in **Control Panel > Proposals**, you can set a default required deposit percentage that will apply universally when creating all new proposals.



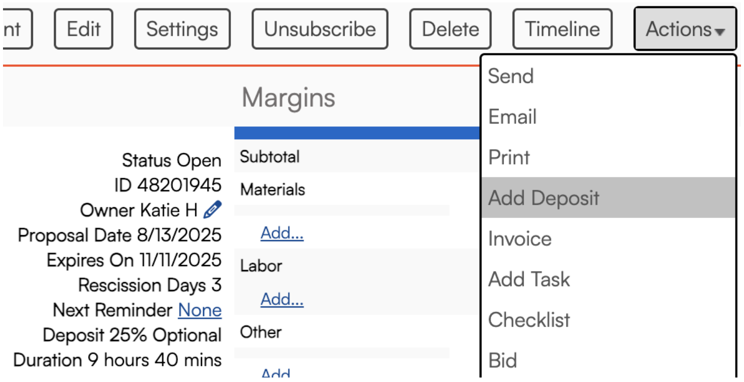
You can also customize deposit settings individually on each proposal. Click **Edit** on the proposal and navigate towards the bottom of the proposal. You can enter a percentage or set amount, and mark it as required or optional.



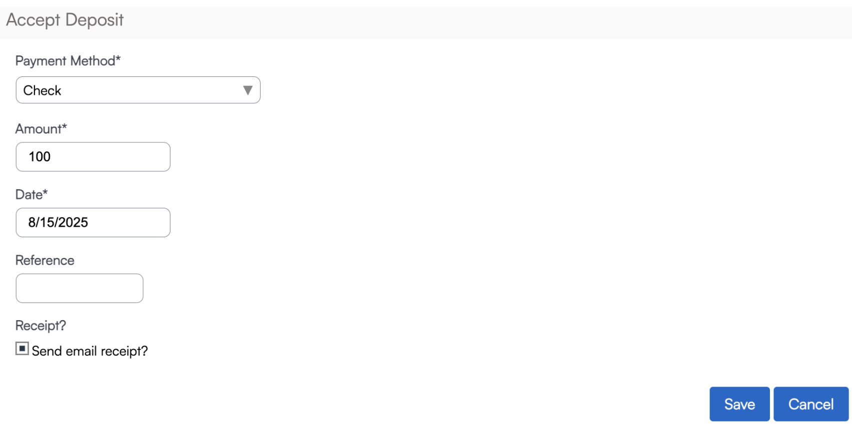
Required means they cannot accept the proposal without entering their payment information to pay that deposit. Leaving this box unchecked makes the deposit optional and will *allow* them to enter their payment information and pay it but doesn't require it for acceptance.

Collect Deposits Manually

If you collect a deposit with any other payment method other than credit card (i.e., cash and check), you can record it manually on a deposit using the Add Deposit button in the **Actions** menu at the top of any proposal and appointment details page.



Here you can choose the payment method, designate an amount, assign a reference number, and choose whether or not to send an email receipt.



Where Do Deposits Go?

When you collect a deposit on a proposal, where it appears depends on your invoice settings:

- **Invoice on Proposal Acceptance**: If the service's **Invoice Mode** is set to **Proposal Accept**, an invoice is generated automatically, and the deposit is applied as a payment on that invoice.
- **Do Not Invoice on Proposal Acceptance**: If the invoice is not generated at proposal acceptance, the deposit stays on the proposal. It will remain there until you create an invoice or schedule the service.

You can view the deposit in the **Total** section on the proposal details page.

Subtotal	$1,230.00
Tarrant County-Fort Worth-TX - 0%	$0.00
Total	$1,230.00
7/23/2024 Deposit	✖ $230.00

For an **appointment**, the deposit will move over and be visible on the appointment details page.

Subtotal	$1,230.00
Tarrant County-Fort Worth-TX	$0.00
Total	$1,230.00
7/23/2024 Deposit	$230.00 Venmo ✖
Margin	61.3% Edit...
Materials	$376.36
Labor	$100.00

Until **invoiced**, the Deposit will not show up in your **Payments** tab. Within QuickBooks Online, a Deposit will live in **Undeposited Funds** until the Invoice is created. Then QuickBooks will automatically attach that deposit to the correct invoice.

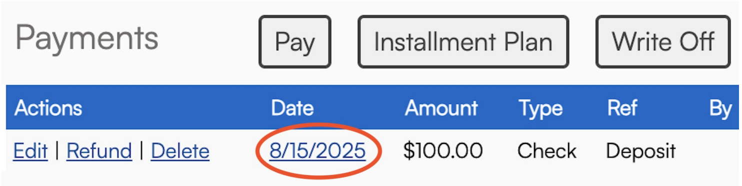
Moving Deposits

Occasionally something will go awry in the workflow and a deposit will still be on a proposal or appointment after an invoice has been generated. Other times, a deposit needs to be moved from one proposal to another. In these cases, follow these steps to move a deposit:

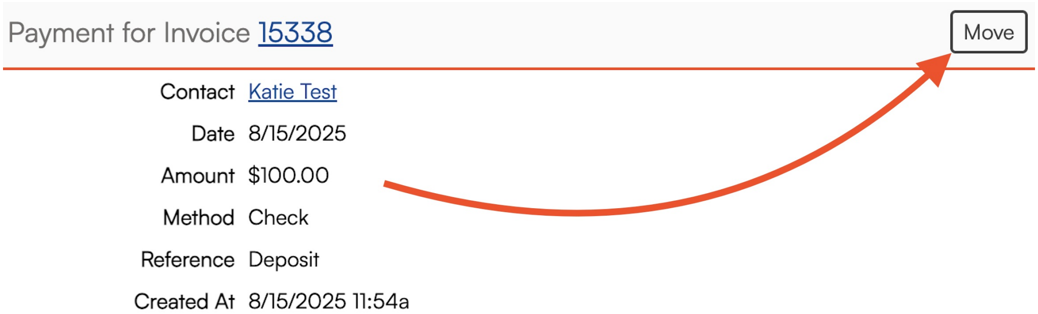
1. On the proposal with the deposit, click **Actions > Invoice** to generate an invoice. This will move the deposit onto that invoice.

2. Navigate to the invoice that has the deposit attached to it.

3. From there in the right corner you will see the **Payments** that have been applied, click on the **DATE** from that deposit/payment.



4. Once you click on that deposit/payment date there will be a box in the top right corner that says **Move.** You will then be prompted with a drop down of all other invoices you can apply that deposit/payment to.



FAQs

When does the deposit show up on revenue reports and which reports are the ones I should be looking at specifically for deposits?

Deposits recorded for a customer are included in the **Payments Download** once they are applied to an invoice. Keep in mind that this is different than a report, so be sure to go to the **Downloads tab** in the reporting section.

Deposits that remain only on a proposal or appointment (not yet moved to an invoice) will not appear in the Payments Download.

The **End of Month Report** may include deposits, but the Payments Download specifically tracks payments tied to invoices.

I invoiced a proposal with a 35% deposit and the proposal appears to have been Completed as the Progress shows 100%. Are there settings I can change how the proposal is marked as Complete?

In **Control Panel > Proposals**, the proposal completion mode may be set to **Invoiced** or **Appointments Completed**. If you change it to Appointments Completed, the proposal will remain In Progress until the appointment is finished.

Why can't I move my deposit?

Once it becomes an actual payment on an invoice, it can be moved. If it's on a proposal that hasn't been invoiced yet, the options are to invoice it, let the deposit move over, then move the payment to the correct invoice and void that original invoice (unless it needs to be there.)

Or you can create a credit memo for the amount, apply that to the invoice, and then remove the deposit. This method works best for check; a credit card payment can get a little tricky.

There is a deposit attached to the contact page, but it is showing optional in the proposal and it also isn't on the invoice. How do I get the payment to attach to the proposal/invoice?

Deposits get stuck on proposals and appointments if they were taken *after* the invoice has already been generated. The best practice is to take the deposit from whichever source the invoice will be generated from (based on Invoicing Mode settings) and then generate the invoice. If the invoice is already generated, the deposit should just be recorded directly there.

If the deposit made by "Check", you can click the **X** next to the deposit to remove it and then record it on the invoice as a payment. It's easier when it is not a credit card payment because it won't be refunded by clicking the X. You're just moving the record of the payment.

If this deposit were made via credit card, the process would be:

1. Edit the appointment and remove the "Finish Time" so that the status is no longer 'Complete'.
2. Generate a new invoice from there.
3. Move the payment (see my explanation in the second part of my response for how to do that).
4. Void the new invoice.

A customer paid a deposit on an accepted proposal using a credit card. After that, he decided to make some changes, which we allowed. That proposal was subsequently declined. A new proposal was created and now accepted. That has been invoiced. How do I get the deposit/payment made to be linked to that invoice without running the card again?

You may not be able to add the deposit to the correct proposal because it was already invoiced. This is a bit of a trickier situation and there are a few ways to fix it - but I think the easiest way would be:

1. Delete the connected invoice in ServiceMinder.
2. Delete the corresponding invoice in QuickBooks.
3. Clear the acceptance on the final correct proposal.
4. Once the proposal is cleared, you will have the "add deposit" button and can add the existing deposit. Adding this deposit should also automatically re-accept the proposal.

If you want to retain the original acceptance, then we have some other methods we could try. Right now, there's no way to add the existing deposit to the new, correct proposal without clearing the original acceptance - it will have to be recorded as a payment instead.

You could:

1. Clear the decline on the proposal with the deposit, invoice that proposal, move the payment over, and then void the old invoice and re-decline the old proposal.
2. "X" the deposit from the old proposal, record it as a payment on the correct invoice, and make an internal note about where the payment came from.