

# Create and Manage Invoices

08/20/2025 10:00 am CDT

## Overview

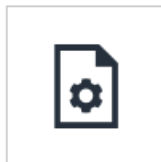
Invoices are the final bill within serviceminder. Depending on your workflow, they may be created automatically when a proposal is accepted or when an appointment is completed. Sometimes you may need to create a an invoice manually. This article will review that process, as well as all of the things you can do on an invoice details page.

This article will review:

- [Settings and Navigation](#)
- [Creating an Invoice from a Proposal](#)
- [Recording Payments](#)
- [Merging Invoices](#)
- [Settings Button](#)
- [Other Invoice Options](#)
- [Credit Hold](#)
- [FAQs](#)

## Settings and Navigation

[Invoice Settings](#) can be found under **Control Panel > Invoices**.



### [Invoices](#)

Configure invoice behaviors.

You can also configure when invoices are automatically generated by editing the invoicing settings on each service. Navigate to **Control Panel > Services > Edit or Add** —look for the [Invoicing Mode](#).

Each service can be customized to trigger invoice creation at different phases of your workflow, depending on how your business operates. These options allow you to align invoicing behavior with your operational process

### Invoicing

Finish Action?	<div>Default Action ▾</div>
Invoicing Mode	<div>Via Appointments ▾</div>
Determines how proposals are invoiced	
Mark Invoices Unapproved?	<input type="checkbox"/> Automatically mark appointment-generated invoices as unapproved
Auto Invoice	<input type="checkbox"/> Auto Invoice?

User permissions for invoicing are located in **Control Panel > Users > Edit > Permissions tab**. Ensure users have the appropriate invoice permissions.

Invoices	<input checked="" type="radio"/> Grant	<input type="radio"/> Deny
Invoices:Approve	<input checked="" type="radio"/> Grant	<input type="radio"/> Deny
Invoices:Delete	<input type="radio"/> Grant	<input checked="" type="radio"/> Deny
Invoices:Edit	<input checked="" type="radio"/> Grant	<input type="radio"/> Deny
Invoices:ExcludeFromEndOfPeriod	<input type="radio"/> Grant	<input checked="" type="radio"/> Deny
Invoices:Grid:All	<input checked="" type="radio"/> Grant	<input type="radio"/> Deny
Invoices:Grid:Open	<input checked="" type="radio"/> Grant	<input type="radio"/> Deny
Invoices:Grid:Paid	<input checked="" type="radio"/> Grant	<input type="radio"/> Deny
Invoices:Grid:Unapproved	<input type="radio"/> Grant	<input checked="" type="radio"/> Deny
Invoices:Void	<input type="radio"/> Grant	<input checked="" type="radio"/> Deny
Invoices:WriteOff	<input type="radio"/> Grant	<input checked="" type="radio"/> Deny

Additional settings for invoice notifications can be found in **Control Panel > Notifications**, under both the **Settings** tab and **Turn Notifications On/Off**. These settings will control which automatic notifications are sent out to contacts (customers) and users (employees).

Notifications

Settings

Turn Notifications On/Off

Invoice Notifications

☒ Email Invoices/Receipts to Contacts?
 

Invoices and receipts will be sent to bobhandyaustin@serviceminder.com if this is not checked.

Invoice Reminders
 

How many days between invoice reminders?



If the "Email Invoices/Receipts to Contacts?" box is not checked, invoices and receipts will be sent to your organization's email address and NOT to contacts. This checkbox allows you to get all of your settings configured how you like them before "going live" and emailing bills to customers.

Invoice	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Invoice Receipt	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Invoice Reminder	<input type="checkbox"/>	<input type="checkbox"/>

You can turn Invoice notifications, as well as notifications for Invoice Receipts and Invoice Reminders, on/off for contacts and for users. User notifications will follow ownership logic - if you have that enabled in your organization. Learn more about that [here](#).



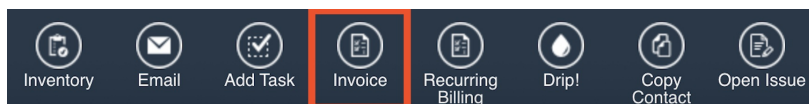
Invoices push to QuickBooks Online (QBO) and automatically apply deposits from the associated proposal. Until then, deposits remain in QBO's "Undeposited Funds" account.

## Creating an Invoice from a Proposal

Users can manually create invoices from accepted proposals, either before or after the project is completed.

To do this:

1. Click **Invoice** in the menu at the bottom of the proposals details page.



1. Select the amount of the proposal you want to charge on this invoice.
  - **Full** – Invoices the entire proposal amount.
  - **Select Lines** – Choose specific lines to invoice (ideal for long-term or phased projects). Already-invoiced lines will appear grayed out.
  - **Percentage** – Invoice a percentage of the total proposal amount.
  - **Amount** – Invoice a specific dollar amount.



The Invoice option will only appear if the user has the **Invoice** permission granted *and* the proposal has a balance greater than \$0.

3. Click **Create Invoice** to proceed.
4. Review the line items and delivery method. Optionally apply a payment.
5. Save vs. Save and Send
  - **Save** – Stores the invoice without notifying the contact.
  - **Save and Send** – Sends an email with a link to the invoice.



To include a PDF attachment of the invoice when sending it, follow these steps:

1. Save the invoice.
2. Select **Email** and choose an ad hoc email template to send the email with.



3. Check the box to **Include PDF Attachment**.

Include Attachment ☐ Include PDF Attachment?

4. Send.

## Recording Payments



- **Total Payment Limit** – Restricts how much a customer can pay. (Useful for progress payments.)



Use the **Total Payment Limit** field to cap how much a customer can pay toward the invoice at one time. You can enter a specific dollar amount or a percentage of the **Max Amount**, which is the total value of the invoice. Note that this **does not factor in any prior payments**—it's based solely on the invoice total.

**Example:** If the invoice total is \$1,000 and the customer has already paid \$100 (10%), and you want to collect another \$200, you would enter **30%** or **\$300** as the payment limit (because \$100 + \$200 = \$300).

- **Max Amount:** \$1,000
- **Payments made so far:** \$100
- **Due Now** (the amount you want to collect now): \$200
- **Total Payment Limit:** \$300

Total Payment Limit  Max Amount: \$1,000.00

Enter an amount or additional percentage to set the Due Now amount to capture from the client

This is what that would look like for the customer paying the invoice:

Item	Description	Area	Test Checkbox	Quantity	Amount
Window Washing	Washing your windows.			1	\$1,000.00
Windows	Windows		No	10	
				Subtotal	\$1,000.00
				Tax	\$0.00
				Total	\$1,000.00
				Check Pmt 4/15/2025 on 4/15/2025	\$100.00
				Balance Due	\$900.00
				Due Now	\$200.00

#### Checkbox Options:

- **Approved** – Mark invoice as ready to send.
- **Voided** – Mark the invoice void (can also use the top toolbar).
- **Downloaded** – Marked when downloaded.
- **Summarize Pricing** – Rolls up pricing to service or option lines.
- **Exclude from End of Month Report** – Exclude from royalty reports (if permission granted).

## Other Invoice Options

- **Split:** Divide the invoice into multiple ones.
- **Finance Charge:** Add a [finance fee](#) for late payments or installment plans.
- **Print:** Click **Print** on the invoice to open a printer-friendly version in a new tab. You can then save or email the

PDF.

- **Copy:** Creates an exact copy of the invoice for that customer. You'll be taken to the invoice editor to adjust line items before saving or sending.

## Credit Hold

Credit Hold can be manually enabled by a serviceminder user when creating or editing a contact.

Next Service Date  --Select One-- ☐ Declined?

Category\*

**Credit Hold** ☒ Credit Hold?

Tags ☐ Blue ☐ Blue Group ☐ Example Tag

Credit Hold is an internal flag to identify overdue customers. When enabled:

- A red banner shows on their contact profile.

Contact

**On Credit Hold**

Name Albert Einstein

Primary Phone [\(000\) 000-0000](#) | Invalid 'To' Phone Number: +1000000XXXX

- Their name appears in red on the calendar (desktop only).

9 1

08:00a ☒ ☐ Albert Einstein

- Credit Hold does **not** block scheduling. It's just a visual indicator.

## FAQs

### Q: Why don't I see the Invoice button on a proposal?

A: Make sure the following are true:

- The proposal has a balance greater than \$0.
- The user has Invoice permissions.

### Q: How do I transfer a payment from one invoice to another?

A: Follow these steps:

- Go to the invoice with the payment.
- Click the payment date (top-right corner).
- Click **Move** and select the correct invoice.
- Void the original invoice.

### Q: Why can't I merge certain invoices?

A: Only **open invoices without payments** can be merged. If there's a payment, move it first, then merge.

### Q: How can we prevent a duplicate invoice when finishing an appointment?

A: Remove the pricing from the appointment:

- Click the blue pen icon on the service or part line.
- Remove any base/unit pricing.

### Q: Why can't I edit line items on a completed appointment?

A: If the invoice is merged and/or paid, the appointment is locked and cannot be edited.

### Q: Why is the appointment completed, but there is no invoice or payment?

A: Go to the **Audit** tab on the appointment. If it was auto-closed (not manually finished), it won't generate an invoice. Click **Invoice** on the appointment to create one manually.

Review the **Finish Action** and **Invoicing Mode** for the associated service. If the appointment was valued at \$0 and the **Finish Action** for the service is **Default Action**, then an invoice will not automatically generate. If you want \$0 invoices to automatically generate when an appointment is finished, set **Finish Action: Generate Invoice** and **Invoicing Mode: Via Appointments**.

### Q: Why aren't invoices appearing in the Unapproved Invoice tab?

A: Only invoices created automatically from **Finished Appointments** with the Service setting "Mark Invoices Unapproved" will appear. Check for this setting under **Control Panel > Services > Edit > Invoicing**

### Q: Why isn't the customer receiving invoice receipts?

A: Go to **Control Panel > Notifications**. Ensure **Invoice Receipt** is turned on and the **Email Invoices/Receipts to Contacts?** box is checked.

---