Create An Invoice

04/15/2025 9:34 am CDT

Overview

Invoices are the final bill within service**minder**, and there a couple of ways to create them. How you choose to do it depends on workflow for your business.

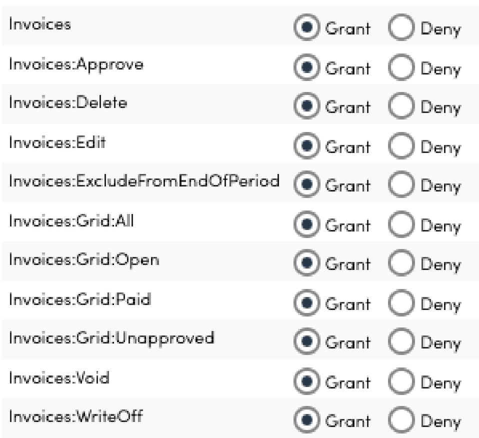
> Invoices push to QBO and pull in any deposits on the associated Proposals. Until then, deposits sit in **Undeposited Funds** within your QBO account. This is the intended behavior, and does not require any manual work on your side.

Settings and Navigation

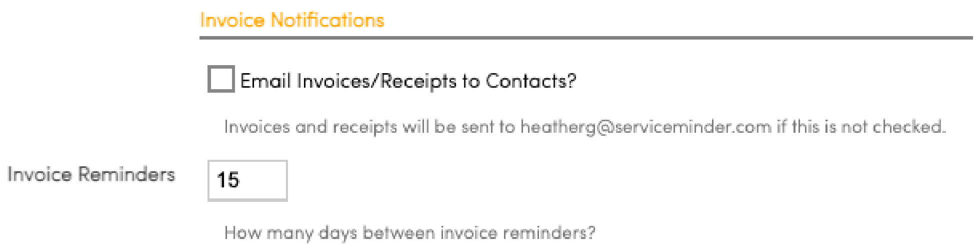
You can find settings for invoices in **Control Panel > Invoices**.

You can find additional settings for when Invoices are automatically created in **Control Panel Services > Edit** or **Add** (for new service) and look for **Invoicing Mode**. To learn more, read Service Settings: Invoicing Mode.

Users have permissions attached to Invoicing. Go to **Control Panel > Users > Edit** and select either **Permissions** tab.



You can find settings for Invoices and notifications in **Control Panel > Notifications** in either **Settings** tab or **Turn Notifications On/Off** tab.

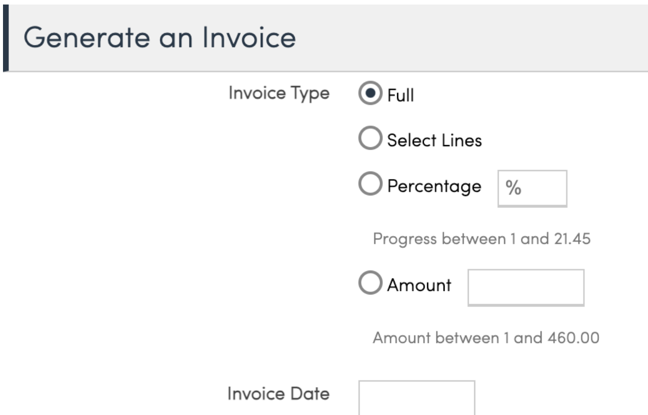


Creating an Invoice from a Proposal

When a user wants to manually create an invoice for an Accepted Proposal, whether that's before the project is complete, or when it's done, there are several choices. These are presented when the Invoice icon is clicked at the bottom of the proposal, and the user is given "Invoice Type" choices:

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

Then, you will see this section and you must choose an **Invoice Type**.



Invoice Type

1. **Full -** This means the invoice is created for the full amount of the sale.

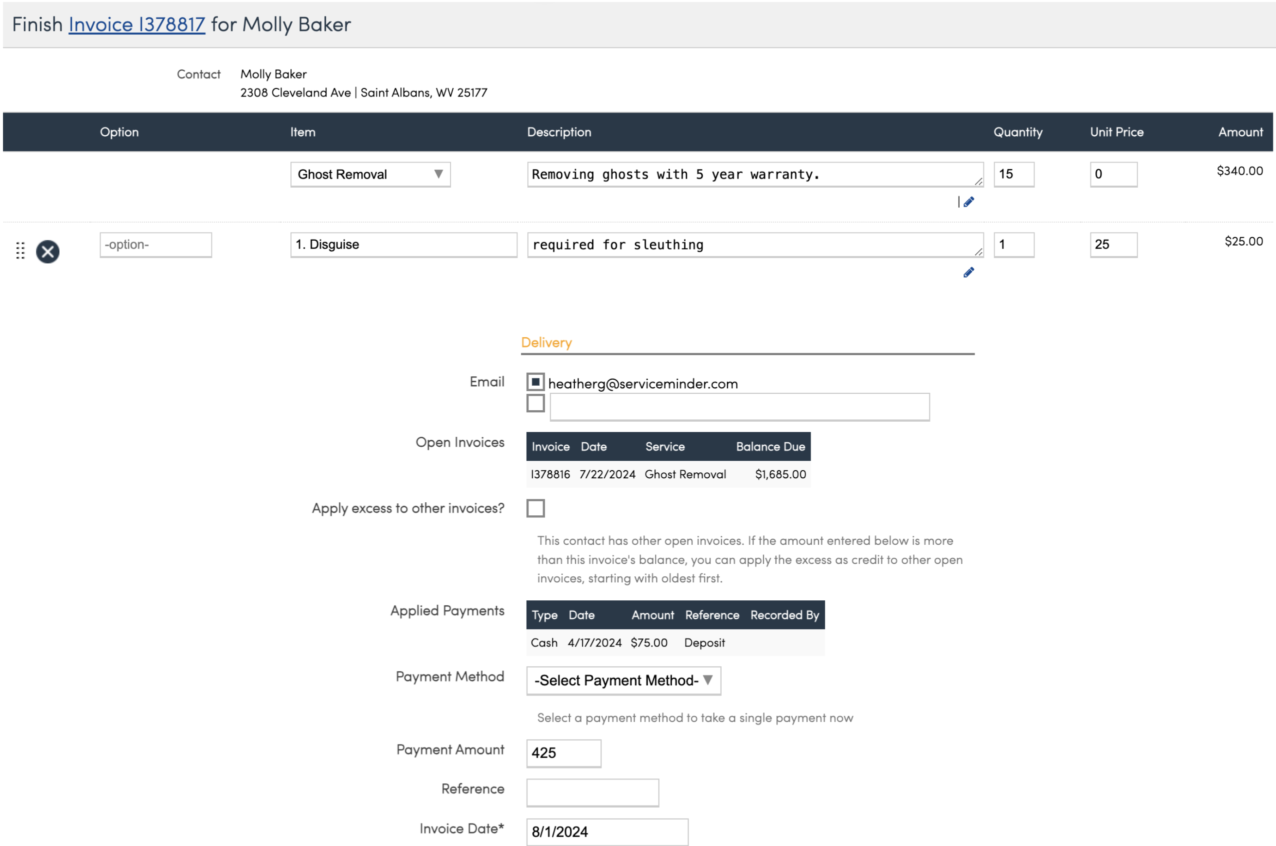
2. **Select Lines** - Allows the user to choose one or many lines to invoice. This is particularly useful on a large, long-term project where the agreement with the customer is that portions will be invoiced as they are complete (these are known as Progress Payments in business-speak.) With this option, you are presented with all lines "checked", so uncheck the lines you *don't* want to invoice at this time.
   a. When you come back to invoice another section, the lines you have already invoiced will be grayed out.

3. **Percentage** - This is percentage of the total. This is also a typical progress payment scenario. The system will keep track of how much you've previously invoiced on the project.

4. **Amount** - Finally, you can create an invoice based on a set dollar amount. Again, a progress payment scenario, in which service**minder** keeps a tab on how much you have previously invoiced for this proposal.

Once you have made your choice, you need to click the **Create Invoice** button.

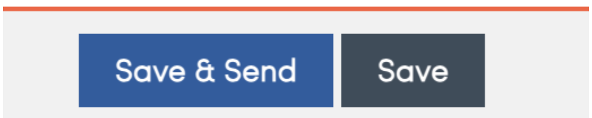
You will see the created Invoice. It will also show if there are additional Open Invoices for that Contact and provide a section to apply a payment.



Save vs. Save and Send

There are two options after creating the Invoice. You can simply Save it and no external notification will go out to the Contact.

Or you can Save and Send, which will send an automated email with the link to the invoice to the Contact.

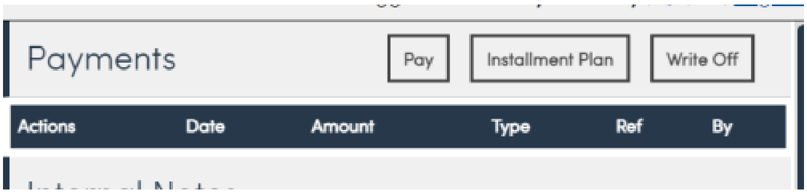


Taking Payment

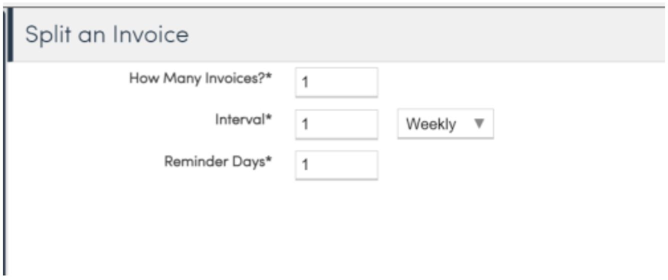
If you have a payment processor set up in Integrations, you can make payments on the invoice in service**minder**. The customer can also pay their invoice through the payment link that will go out in invoice emails.

If you don't have a processor set up with serviceminder, then you can record the payments on invoices manually when the payments are made by the customer. Your payment methods can be configured to help with your accounting.

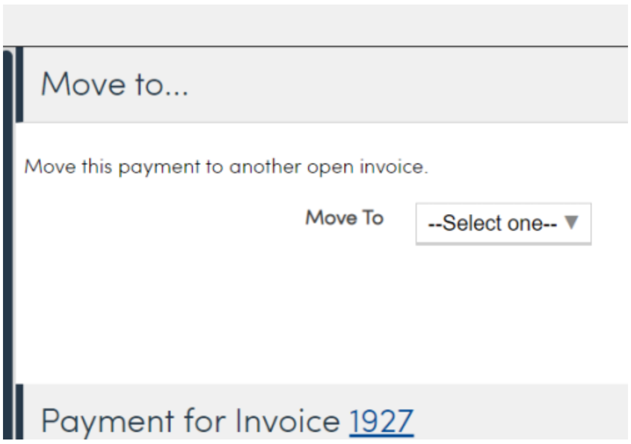
You can add a payment plan (if you have them set up) on the main invoice view screen. You can also write off the invoice from here.



You can split up the invoice so that more than one invoice will go out to the customer.



You can also move a payment to another open invoice belonging to that customer.



Merging Invoices

Occasionally a customer may have multiple open invoices that you'd like to combine so they can pay it as one.

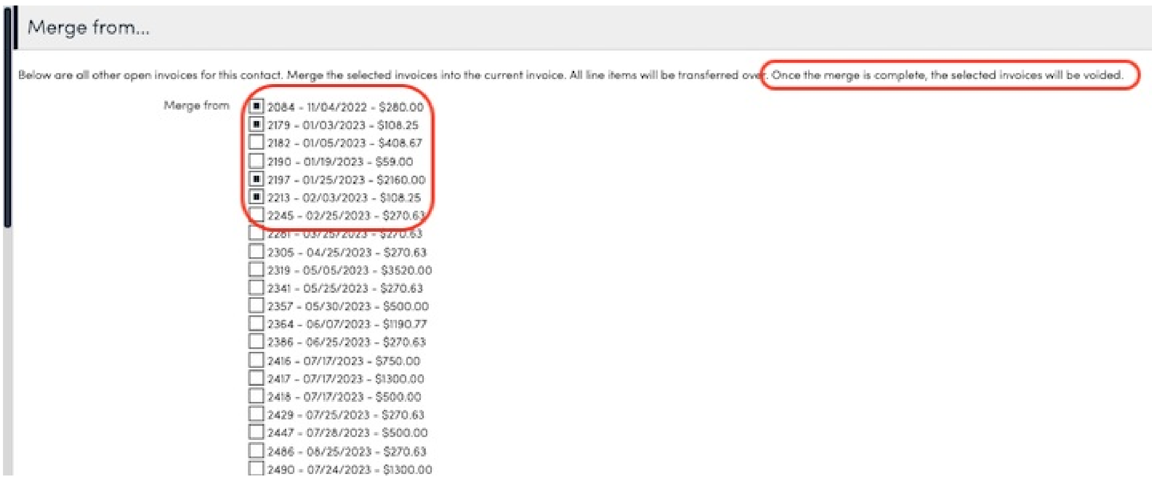
Individually Merge

Open the invoice you want to "merge" other invoice(s) into, and select **Merge**.

Bulk Merge

Choose one or more open invoices. Any open invoices that can be merged will show up for that same customer. You may combine parts or leave them all separate. We recommend merging invoices for similar services that you'd like the client to pay as one.

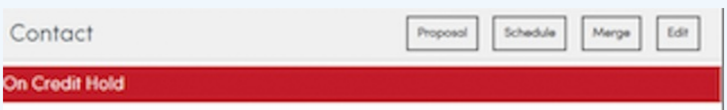
All merged invoices will be **Voided** and will be visible in the audit trail on the remaining invoice.



Credit Hold

Credit Hold is just a flag. It's an internal check box used to mark an account if the customer is overdue on invoices. When checked, whenever you bring up the client, it will flash at the top in red with the credit hold status. We will also highlight their name for any appointments that get scheduled for them in the calendar (desktop only) in red.

We don't block scheduling or other activities for a client that is marked on Credit Hold - it's just a visual cue.

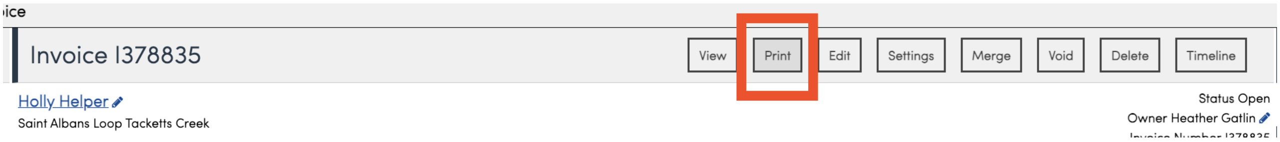


The only way for this to be marked is for a SM user to check the box when adding a new contact.

Here is more information on how to pay Multiple Invoices or handle Overpayments

Print an Invoice

After an invoice has been generated, go to the invoice, and click the **Print** button up at the top.



This will open up a new tab with a printer friendly version of the invoice. You can then "print to PDF" or save it as a PDF and then email it directly to the client.

FAQs

Why don't I see an Invoice button on my proposal?

Check the following things:

- Does the proposal have a balance? A $0 proposal will not have the option to Invoice.
- Does your User have the **Invoices** permission granted? This permission is required to create and edit invoices.

We accidentally did some things out of order. How can we get rid of his first invoice and transfer the ACH payment to the correct invoice attached to the proposal and appointment?

There are two options:

1. The payment can be moved to the correct invoice and void the original.

2. The new open one can just be voided now. If both are attached to the proposal, either way will fix it.

Voiding the new one is the easier option, but here's how to move a payment also:

- Go to the invoice with the payment, click the payment date (in the upper right).
- There's a Move button in the upper right corner, click that, and move it to the right invoice.
- Void the original.

Why can't I merge these invoices?

Only Open invoices that do not have payments on them can be merged. Make sure the invoice you want to merge into another meets these qualifications. If there is a payment on the invoice, you can move the payment first then merge the invoices.

Sometimes we generate an invoice before the appointment. When we "Finish" the install appointment, it creates another invoice. Is there a way to finish the install appointment without it creating a second invoice?

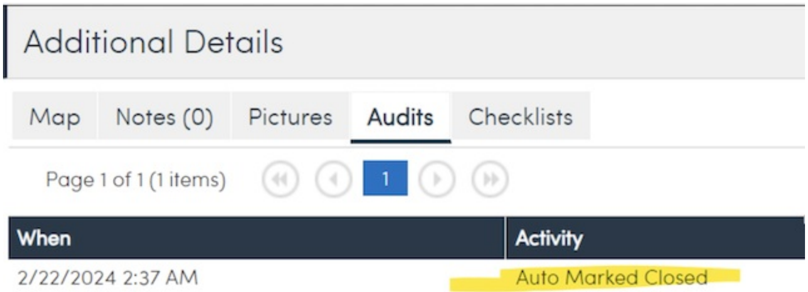
You will need to remove the pricing from the appointment so that it won't invoice again. So if there is a cost showing on the Appointment, click on the blue pen icon under the "Part" or "Service" description and remove any "Base" or "Unit" pricing that is contributing to the total amount shown.

When I went to the appointment, since it was completed, I couldn't change any line items. How do I get around this?

We don't have a way around it if the invoices were already merged and paid. The appointment cannot be altered at that point.

I see an appointment completed but I don't see any invoice or payment.

Go to the "Audit" tab of the appointment to look for the cuase. If the appointment was auto marked closed, that doesn't go through the regular start and finish process that generates an invoice. To fix, click Invoice on the appointment to manually generate the Invoice.

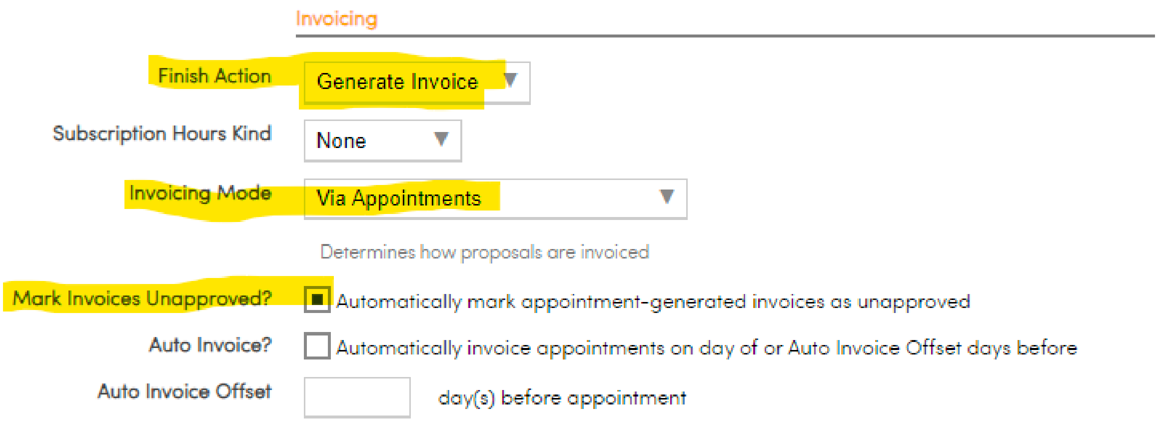


I am not having any invoices show up for approval in the Unapproved Invoice tab in the Snapshots menu.

Direct create of invoices doesn't do the unapproved action. It happens when invoices are created automatically by means of starting/finishing an appointment.

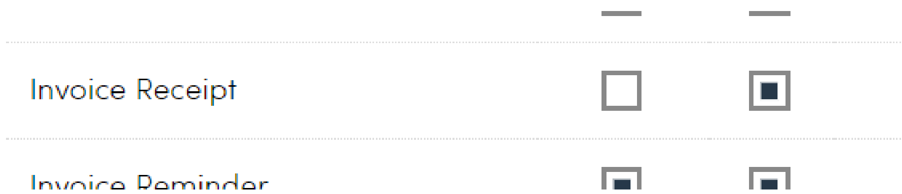
If you have the Finish Action of a specific Service (Control Panel > Services > Edit a service > Scroll to Invoicing) set to "Generate Invoice" and check the "Mark Invoices Unapproved" box, then those invoices automatically created from finished appointments of that service will be unapproved. You can change the invoicing mode on that service as well.

Assuming all of those are set and an appointment is finished using that service, an unapproved invoice will auto generate.



Customer isn't getting the invoice receipt.

If the customer isn't receiving invoices, check the Notificaitons first. Settings may be turned off in Control Panel > Notifications. For instance, the "Invoice Receipt" box may need to be checked on so that you will have a Send option.



I delete invoices and they reappear.

For the invoices, deleting will revert any associated appts back to an unfinished state, so that is the correct workflow. Voiding is the best route in that situation.

We run into situations where we can't edit an accepted proposal and can't make changes to the invoice, what do I do if I have to make edits to a work order and my technicians need to see the updates?

Yes, you can use a Change Order if you need to edit an accepted proposal that already has been invoiced or scheduled.

Essentially, with a change order, you can add new items, or remove line items by entering a negative quantity. Once the change order has been accepted (either internally or by the client) you'll need to merge the invoices so that your techs see the final information.