Top 10 Questions: Invoices

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Overview

These are the most frequently asked questions about Invoices.

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1. Why can’t I merge these two invoices?

Yes, these invoices can be merged! You just have to move the payment over first. Merging invoices doesn't move payments, and it results in the "old" invoice being voided, so the system will block that action if both invoices have payments on them.

To move a payment, you'll view the invoice that you are wanting to merge into the other and click on the date next to the payment. On the next page, you'll see the Move button in the top right corner of the screen. After the payment is moved, you'll be able to merge that invoice into the one that now holds both payments.

If both Invoices have payments, then you will need to Move one payment to the other Invoice - then merge.

2. Why does closing an appointment auto-generate an invoice, and how do I make it stop?

Appointments that auto generate invoices (that shouldn't) can be reopened, the price on the appointment can be Zeroed out and saved. Then the appointment finished.

You must also make sure that the Invoice settings are correct so that $0 invoices are not created. You find that in Control Panel > Invoices > find the checkbox labeled "Send $0.00 Invoices" and uncheck it.

You can go to the setting for Appointments and select the "Default Action" to be "Close Appointment". However, if you do that, then the appointment is not searchable to attach a proposal to.

3. If I void $0 invoices, will they be included in total invoices in reporting?

No, voided invoices will not be included for total invoices when it comes to reporting.

4. How can I easily see what Proposals or Invoices have been sent for an appointment?

You can go to the "Timeline" button on the appointment, located in the top right corner of the screen. This will provide a history of the appointment and when proposals or invoices were generated or edited.

That will provide some context as you problem-solve or just show a full picture of past work done for the customer.

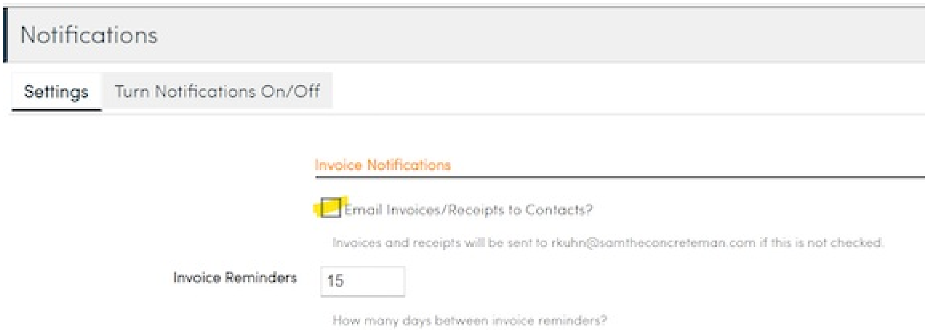
5. What happens to payments with merged invoices?

By default, if invoices from appointments are merged, then the appointment whose invoice was merged into the other goes go to $0 and the other will have the total from the invoice.

6. Why are my invoice emails going to my organization email and not my customers?

Notifications for invoices need to be enabled. In Control Panel > Notifications, the first page and the top checkbox - this is the official "Go Live" box to check when you're ready to start invoicing customers.

Then on the second tab (Notifications On/Off) make sure Invoices are turned on to send to Contacts.



7. If I select "Email" within an invoice, would that automatically attach the invoice to that email?

The "Email" button is for ad hoc email templates - so if you have an "Invoice" type ad hoc email template, you can put the shortcode into it and save it. Then when you select it from the invoice, it will have a link to the invoice. Alternatively, the "Send" button will send the default invoice email which contains a link.

8. How does deleting the invoices, affect EOM reporting?

We recommend "voiding" instead of "deleting" invoices. If your EOM reporting mode is Invoices, that should factor in Voids and exclude those (as long as the invoice wasn't already submitted in an EOM report.)

9. I can't attach an invoice to an appointment.

You cannot move a paid invoice to an appointment. However, you could invoice the appointment and move the payment from the first invoice over to it and void that first invoice.

10. Why can't I edit an Invoice? The button just disappeared?

It may be that the invoices were likely included on the End of Month Report. The edit button goes away once it is included on a submitted EOM Report. The report would have to be un-sumbitted to make the invoice editable again.

11. Why is the audit blank for an invoice? I can't tell who created it.

If the invoice was generated automatically as the result of completing an appointment, then there won't be an audit for who created it. In the top right of the details, though, you can see the date and time it was created along with the service that it was generated from. You can also check the audits for the appointment and find who completed it/who created it there.

12. When we close out an invoice as paid in QuickBooks with a credit card and then close it out in ServiceMinder do we get charged twice?

As long as you log the payment in service**minder** correctly, the customer will not get double charged. If the customer pays via credit card outside of service**minder**, and you go to log the payment in service**minder** afterwards, I would recommend going in and marking this as a “no” for publish to QuickBooks.

Go to **Control Panel > Payment Options > Edit** and uncheck the box. Since you’ve already logged the payment in QB we don’t want the payment to publish for a second time in QuickBooks. I would recommend changing the name of this so it’s nice and clear to something like “credit card captured offline”. That way you know this is the one you select when you are manually logging a credit card payment.

The only way a customer could get charged twice is If they have their credit card stored in service**minder** and when you log the payment in service**minder** you choose that as the payment method.

13. There are three proposals for a location, which have been accepted by a single Contact and rather than convert to invoice, the franchisee created a separate invoice. What is the best practice to get the accepted proposals closed and cleaned up in

their organization?

The best option here would be the following steps:

1. Invoice the proposal.
2. Go to the paid invoice and click on the payment.
3. Click Move in the top right corner of the payment page and select the new Invoice you just made.
4. Void the old Invoice.

14. After we accept a proposal for a customer for the season and after that they want to pay the invoice manually, how would we send them a way to pay off the invoice? When sending the invoice there is no option to pay it, it is only able to be viewed.

Invoices with pending installment payments on has no pay link.

In order to allow the customer to pay an invoice off in full, you have to click Cancel on each of the future installments and then accept/apply a payment on the invoice to pay it off in full. After removing the pending payments, you can also hit Send on the invoice again to send it to the customer to let them pay.

15. When a refund get's processed through ServiceMinder a negative invoice get's created. The issue there is that the original invoice remains with a balance due on it but there is now also a negative invoice. How do we reconcile that balance remaining if the job is not going to get paid but also ensure that the negative invoice get's balanced out?

With Credit Memos and Write Offs, doing a refund in service**minder** is a two step process as explained in this article. Essentially you will want to issue the refund but then you need to handle that remaining balance through a write off. To do this, you will navigate to the invoice and in the upper right next to "payments" you'll want to select write off.

16. Can QBO import multiple service lines from invoices from ServiceMinder?

No, there is only one service line per proposal/invoice within SM. Once invoiced, QBO will only see the most recent service line to import.