Top 10 Questions: Invoices

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

These invoices can be merged, but you must move any payments first. Merging invoices does not move payments, and the system blocks merging if both invoices have payments.

To move a payment:

- Open the invoice you want to merge into the other.
- Click the date next to the payment.
- On the next page, click **Move** in the top right corner.

Once the payment is moved, you can merge the invoice into the one that now holds both payments. If both invoices have payments, move one payment first, then merge.

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

If appointments are generating invoices when they shouldn't:

- Reopen the appointment.
- Zero out the price and save.
- Finish the appointment.

Also ensure your Invoice settings are correct:

- Go to **Control Panel > Invoices**.
- Uncheck **Send $0.00 Invoices**.

You can also set **Default Action** for appointments to **Close Appointment**, but note that appointments closed this way will not be searchable to attach proposals.

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

No. Voided invoices are excluded from total invoice counts in reporting.

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

Make sure you have enabled invoice notifications for your contacts:

- Go to **Control Panel > Notifications**.
- Check the top box on the first page to enable "Go Live."
- On the second tab, ensure **Invoices** are turned on for Contacts.

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5. If I select "Email" within an invoice, does it attach the invoice automatically?

The **Email** button uses ad hoc email templates. If you have an “Invoice” type template with a **{url}** shortcode, it will include a link to the invoice. Use the **Send** button to email the default invoice template that already includes the invoice link.

6. Why can’t I edit an invoice? The button disappeared.

Invoices included in a submitted End of Month Report cannot be edited. To make it editable again: unsubmit the EOM Report, make your edits, then resubmit.

7. Why is the audit blank for an invoice?

Invoices generated automatically from completing an appointment do not show a creator in the audit.

- Check the top right for the creation date, time, and source service.
- You can also check the appointment audit for who completed it.

8. 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?

No, as long as you log the payment correctly:

- If the payment was processed outside ServiceMinder, go to **Control Panel > Payment Options > Edit** and uncheck **Publish to QuickBooks**.
- Rename this option to something clear like “Credit Card Captured Offline.”

The only way double charges occur is if the customer’s card is stored in ServiceMinder and selected when logging the payment.

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

Best practice:

1. Invoice the proposal.
2. On the paid invoice, click the payment.
3. Click **Move** in the top right and select the new invoice.
4. Void the old invoice.

10. When a refund gets processed through ServiceMinder, a negative invoice is created. The original invoice still shows a balance. How do we reconcile this?

Refunds in ServiceMinder require two steps:

1. Issue the refund (creates a negative invoice).

2. Write off any remaining balance:

    a. Navigate to the invoice.

    b. Click **Write Off** next to **Payments** in the upper right.