# Invoice Settings

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Overview

This article outlines how to manage invoice behavior in service**minder**, including default settings, user permissions, approval workflows, payment configurations, and invoice terms. Whether you're looking to automate approvals, control payment limits, or customize terms for specific clients, this guide will help you tailor your invoicing process to meet your business needs.

> This article will review:
> - Settings and Navigation
> - General Invoice Settings
> - Payments
> - Terms
> - Approved/Unapproved Invoices
> - Cease Invoice Reminders
> - FAQs

Settings and Navigation

Most invoice-related settings can be found under **Control Panel > Invoices**. These control how invoices are generated, displayed, and processed.
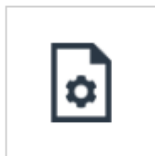
Additionally, invoicing permissions for users can be configured under **Control Panel > Users > Edit > Permissions**.

Some service-level settings may also impact invoice behavior. Navigate to **Control Panel > Services > Edit** to explore invoicing options specific to a service. Learn more about Service Invoicing Mode here.

Finish Action [Generate Invoice ▼]

Invoicing Mode [Via Appointments   ▼]

Determines how proposals are invoiced

Mark Invoices Unapproved? ☐ Automatically mark appointment-generated invoices as unapproved

Auto Invoice? ☐ Automatically invoice appointments on day of or Auto Invoice Offset days before

Auto Invoice Offset [   ] day(s) before appointment

If Auto Invoice is enabled above, sets the number of days before an appointment to create the invoice and charge the payment

General Invoice Settings

Tax Rates

Click the **Manage Tax Rates** link to configure taxes for your organization.

Use the **Default Tax Rate** dropdown menu to set a tax rate that will populate as default if no other tax rate is set.

View our Setting Up Taxes article to learn more.

Invoice Number and Invoice Number Template

Invoice Number: This sets the starting number for your invoices.

> 🔔 Use extreme caution when changing this value. If you set it as a number that is smaller than already-existing invoices, it can result in invoices being overridden in QuickBooks due to duplicate IDs.

Invoice Number Template: This field is used to customize invoice numbers. Place {id} where the invoice number should go. (ex: **Inv-{id}** would create the invoice number format **Inv-1234**)

Invoice Due Days

The number of days after invoice creation that payment should be due. Use 0 for immediate.

Appointment Invoice Mode

Determines the behavior of the Invoice button on appointments. Can either create an unapproved or an approved invoice when an invoice is generated from an appointment.

See the **Approved/Unapproved Invoices** section below to learn more.

Appointment Inventory Mode

If the mode is **Normal** then the technicians add parts/items to the appointments as needed/as they finish. They will default to whatever the part's "internal" setting is.

If the mode is **Internal** then they will have an "inventory" action available on the appointment and they can record any parts/items they use on the appointment there -- those will automatically be 0 and also marked as internal, regardless of what the part is set to.

Send $0 Invoices

Some businesses choose to create invoices for $0. If you want these to send to customers, check this box. Otherwise, those will not automatically send invoices or receipts if you have Invoice specific **Notifications** turned on.

Please review Invoice Notifications for more information.

Payments Settings

Consolidate Payments

Check the Consolidate Payments checkbox to enable the ability to consolidate what a contact owes you into one monthly payment.

To learn more about these settings, please review Automatic Payments

Total Payment Limit

On an individual invoice details page, click **Settings** at the top of the page. Here, you can adjust the **Total Payment Limit**, which controls how much you are collecting from the customer at a time. Please note that this value reflects the **total** you want the customer to be able to pay, including past payments. If a customer has already paid $100 and you want to collect another $100 payment from them, you want to set this amount to $200.

Terms

Invoice terms are separate from Terms and Conditions for proposals. This section only shows on Invoices.

Setting up Terms

This setup is in **Control Panel > Invoices**. Scroll down to "Terms" and you'll see the serviceminder standard Default is already created (Due upon Receipt). This default is easily edited by the user. To add additional terms, click "Add" on the table.

Contact-specific Terms

To create a custom set of terms for a specific contact, go to that contact and **Edit**. Scroll down to find the **Terms** setting:

Choose the desired Invoice Term for that customer. This will override any Default organization terms. A user may also go back to Control Panel>Invoices to create as many additional terms as desired.

Invoice-specific Terms

An invoice will automatically present the Organization's default terms, or, if the Invoice is for a Contact who has been assigned unique terms, then any invoice for that Contact will have those terms applied.

A user may change a unique Invoice's terms, as well. After an Invoice is created, go to Settings and select the desired Terms, then save.

You can also set up custom **Invoice Above the Fold** text. Learn more about that in our Terms and Conditions article.

Approved/Unapproved Invoices

There are three ways to control whether an invoice requires approval before being sent to the customer:

All Invoices By Default

To have all invoices generated from appointments marked as "Unapproved":

- Go to **Control Panel > Invoices**

- Locate **Appt Invoice Mode** and select **Unapproved**

By Specific Service

To mark only invoices from a specific service as unapproved:

- Go to **Control Panel > Services > Edit [Service]**

- In the **Invoicing** section, check the **Mark Invoices Unapproved** box

Mark Invoices Unapproved? ☐ Automatically mark appointment-generated invoices as unapproved

By Specific User

To require approval for appointment-generated invoices that are created by a specific user:

- Go to **Control Panel > Users > Edit [User] > Permissions tab**

- Under **Send Invoice Approvals To**, select the approver's name

Send Invoice Approvals To   [None ▼]

Select a user to send invoices generated by this user for approval.

Cease Invoice Reminders

To stop reminders for any particular Invoice, you can head to the Invoice's Details page and look in the upper right corner of the Invoice body. If there is an upcoming reminder, it will appear with an X to remove it. Removing a reminder like this will indefinitely prevent further reminders from sending for that Invoice until you choose to send the Invoice again.

| View | Print | Edit | Delete | Timeline |

Status Open
Owner Admin ✎
Invoice Number 715
Invoice Date 7/20/2019
Created At 7/20/2019 3:05p
Last Emailed 11/13/2019
Next Reminder 11/28/2019 ✖
Service Installation
Proposal Installation

FAQs

If I go in and complete a proposal, will it create an invoice?

If you are wanting to close the appointment and not generate a new invoice, these are the settings you'll want for the service:

Invoicing

Finish Action: Close Appointment ▼

Invoicing Mode: Manual ▼

Determines how proposals are invoiced

Go to **Control Panel > Services > Edit** Service. Scroll down to Invoicing section. As long as those two settings are changed to Close Appointment and Manual, it should not generate another invoice automatically.

How can we show service date on the invoice?

Go to Control Panel > Scheduling and check the following box/boxes. The second images is what the invoice will show.

Proposals and Invoices

Show Schedule Dates? ☑ Include on proposals
                      ☑ Include on invoices

T E R M S

Due upon receipt. Interest of 1.5%/mo may accrue on unpaid balances.

O P E N I N V O I C E S

You still have 29 open invoice(s). You may use the list below to find and pay outstanding ba

View Statement

Invoice	Date	Service	Balance Due
2428	7/25/2023	Annual Maintenance	$162.38
2449	8/1/2023	Annual Maintenance	$162.38
2461	8/8/2023	Annual Maintenance	$162.38
2468	8/15/2023	Annual Maintenance	$162.38
2478	8/22/2023	Annual Maintenance	$162.38

This is what I'd like to have: 1- Agents finish job and send invoice for approval to me. 2- I approve invoice and charge customer. 3- I decide if I send or not invoice and receipt to customer (not all of them want to receive it). Could you please guide me into what is the correct setting for what I'm looking for?

First, go to **Control Panel > Invoices**. Make sure the **Appt Invoice Mode** is set to "**Unapproved Invoice**" and click **Save**:

Invoice Settings

	Invoices
Tax Rates	Manage tax rates
Default Tax Rate	--Select one-- ▼
Invoice Number Template	{id}
	This field is used to customize invoice numbers. Place {id} where the invoice number should go. (ex: "Inv-{id}")
Invoice Number	6654
Invoice Due Days	10
	The number of days after invoice creation that payment should be due. Use 0 for immediate.
Appt Invoice Mode	Unapproved Invoice ▼ ←
	Determines the behavior of the Invoice button on appointments. Can either create an unapproved or an approved invoice.

Then, go to **Control Panel > User**, and click **Edit** next to the name of the agent you'd like to change the invoice permissions for. Then click on the **Permissions** tab. In the drop down menu next to **Send Invoice Approvals** to, select your name:

Settings | **Permissions** | Notifications

Standard Permissions

Pricing	☒ Can See Pricing
Reschedule Appointments	☐ Reschedule appointments in mobile
Transfer Appointments	☐ Transfer appointments in mobile
Slot Searching	☐ Limit slot results to this user
Searching	All Contacts ▼
Include Member Orgs	☐ Search all member organizations
Proposals	Owned ▼
Send Invoice Approvals To	None ▼ ←
	Select a user to send invoices generated by this user for approval.

Then on that same page, scroll down to **Permission Overrides**, and make sure that the **Invoices:Approve** permission is set to **Deny**, and click **Save**:

Invoices	⦿ Grant ◯ Deny
Invoices:Approve	◯ Grant ⦿ Deny
Invoices:Delete	◯ Grant ⦿ Deny

Finally, go to **Control Panel > Notifications**, and click on the "**Turn Notifications on/off**" tab. Then scroll down to Invoices:

Invoice	■
Invoice Receipt	■
Invoice Reminder	■

If you don't want the customer to get a notification about the invoice being created then uncheck "**Invoice**" in the first column; if you don't want them to get a receipt after they paid the invoice then you should also uncheck "**Invoice Receipt**". Click **Save**.

The Send button on the invoice is not sending to the Customer.

Make sure that your notifications for invoices are 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.

What are serviceminder's Organization default terms?

For a new account, default terms for an Organization are "Due upon Receipt, " but this is easily changed in Control Panel>Invoices.

What if I want a Contact to have different invoice terms, depending on the job?

In this case, you would change the terms at the Invoice level.