Must Do's For Go Live

07/29/2025 9:46 am CDT

Overview

Are you done testing and learning in your service**minder** account and ready to start taking actual bookings and running your business? Here are the things you need to ABSOLUTELY do before going live. Consider this page a general SOP for turning on your organization, but your brand may have a more detailed or preferred SOP for you to follow.

You may want to check with your Brand Admin before doing any of these steps.

This article will review:

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1. Enter Your Billing Info

Depending on how the brand charges for your SM account, the franchisee may need to go to **Control Panel > Account** and add the franchisee's cc information.

If the brand charges the franchisee directly, then the Brand Admin needs to go into **Dashboard > Tools > Organizations > Edit** and put **Invoice** as the **Billing Method**.

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2. Tax Service or Parts

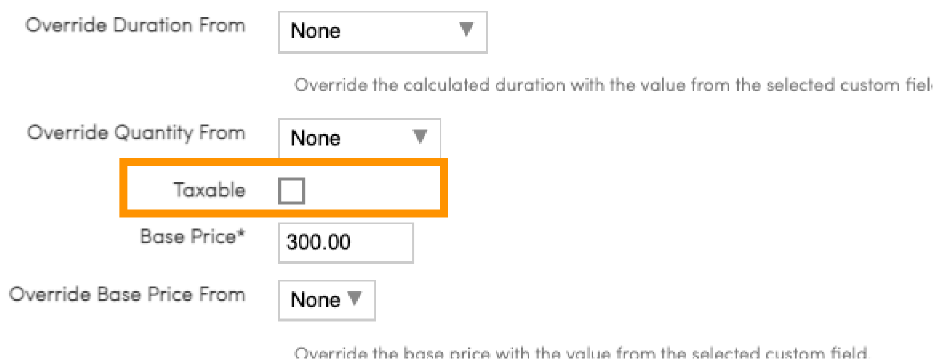
After you have completed Setting Up Taxes, you need to make sure and either make Parts and/or Services taxable. Due to each state having different tax codes, the brand cannot deploy all of these settings to each organization. The final step in automatically charging taxes for parts and services comes down to the franchisee making the final decisions.

Usually, the service**minder** will help brands do the initial strategy, and we recommend making all parts taxable and having the Service not having that automatic box turned on. That means you may only have to do the work at the Service-level. We recommend checking with your Brand Admin if you are unsure.

Go to **Control Panel > Services** or **Control Panel > Parts**.

Click edit next to the Service or Part, then scroll till you see the **Pricing/Duration** section.

Look for the **Taxable** option, and turn on according to your state's tax mandates.



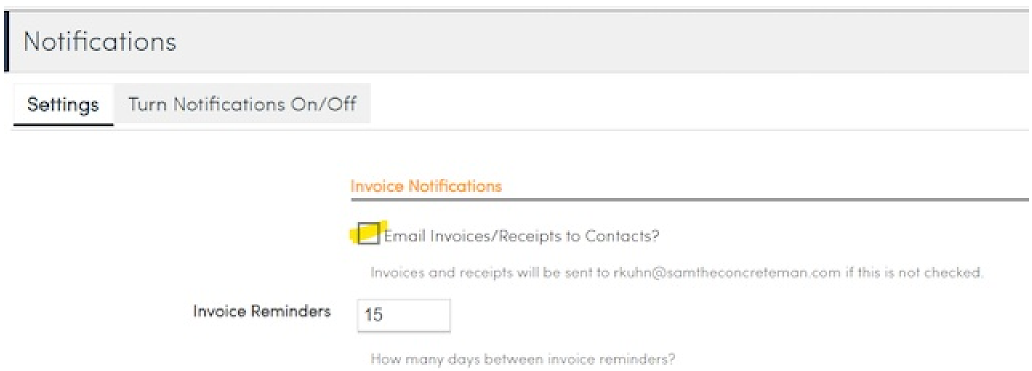
3. Payment Processor / Merchant Processor Information

Please note, that it is extremely important that you have set up your payment processor. If you are unsure if this has been completed, please review our article about Merchant Processing Account Configuration. **This page will also explain how to test your credit card. This is an important step that should not be skipped!**

4. Turn On Master Communication Setting

Make sure that your notifications for invoices are enabled. In **Control Panel > Notifications > Settings** tab (the first page and the top checkbox.

This is the official "Go Live" box to check when you're ready to start invoicing customers.



Also on the **Notifications** section, you should go to the **Turn On/Off Notifications** tab. These will all be defaulted off, so you need to turn on what you want Users, Contacts, and Service Agents to receive.

Learn more about Create a User: Notifications.

FAQs

Should I be seeing all of our territory Postal Codes and mapping them? I only see 2 of them but I should have way more.

This will update as invoices are created for additional areas. Right now, you may not have contacts in all territories within your service**minder** contact list. It will only show zips, cities, etc. of existing contacts.