

Payment Methods, Payment Plans, and Recurring Billing

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Overview

This article will review:

- [Settings and Navigation](#)
- [Adding Payment Methods](#)
- [Setting Up Payment Plans](#)
- [Recurring Billing](#)
- [Payment Reporting](#)
- [FAQs](#)

What's the difference between **Payment Plans** and **Payment Methods** and **Recurring Billing**?

- **Payment Methods** are the ways you accept money from your customers.
- **Payment Plans** allow you to give your customers option to pay over time. Installments are specifically about the amount of payments made towards the balance of a service.
- **Recurring Billing** is also a pay over time method, but attached more specifically to subscription services. Subscription-style services are used for cases where you want to schedule a (typically) fixed length service offering where the appointments are distributed over a series of visits.

Settings and Navigation

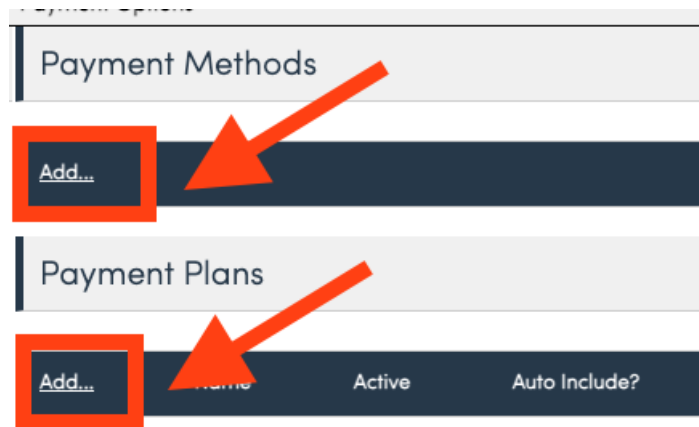
You can create both **Payment Plans** and **Payment Methods** on the same page within serviceminder.

Go to **Control Panel > Payment Options**.



[Payment Options](#)

Set up payment plans and additional payment methods for your customers.



Adding Payment Methods

ServiceMinder provides two payment methods by default: cash and check. [Credit Card processing](#) is set up separately.

If you accept other forms of payment like Venmo, PayPal, or Google Pay, you can set those up on the **Payment Options** page by clicking **Add** under the **Payment Plans** section.

First, you need to give this payment method a name and description. This description will display to the customer if you choose to offer it as an option upon proposal acceptance.

Add a New Payment Method

Name*

Venmo

Public Description

1 Select this option if you will be paying your deposit using Venmo.

2 Please Venmo the requested amount within 24 hours, or the proposal acceptance will be rescinded.

At the bottom of the page, there are two checkboxes that give you the option to publish the payment to QuickBooks and offer this payment method for customers paying a deposit on their proposal*.

☐ Publish this payment method?

If enabled, payments made using this method can be published to external sources such as QuickBooks Online

☐ Allow on Proposal Accept?

Allow this payment option to be used by contacts when accepting their proposals online



These alternate payment methods are just for recording payments you have already received on an invoice. "I got paid, now I need the invoice to show I got paid". If you offer an alternate payment method on the proposal, it will be recorded, but not be collected, in serviceminder. The customer will have to pay you with their chosen method outside of our system.

If you choose to offer one or more alternate payment methods on proposals, customers will see the **Other** option next to Credit Card or eCheck.

A payment of \$59.50 is optional. You may enter your payment information below or send us payment.

☐ eCheck ☐ Credit Card ☒ Other ☐ Financing

Select a payment option before accepting your proposal:

Custom Payment Method

Public Desc for Custom Payment Method

Select Option

Setting Up Payment Plans (Installment Plans)

Payment Plans allow equal automated payments over a set period of time. Once set up, payment plans can be offered to a customer during the "proposal acceptance" process. You may also choose a payment plan once a customer's invoice has been created.

Once a payment plan is attached to a contact/customer, automatic "installment payments" will begin. These run at the set time scheduled in the payment plan.



For payment plans, one invoice is generated and the plan is applied. This will run the payments automatically based on the set schedule. It doesn't send out multiple invoices, so the invoice can be sent whenever it is generated, like from a proposal.

There are many different ways to setup a payment plan. We're going to walk through one example: This is a Payment Plan with two payments, with the first being a 50% deposit. The deposit counts as payment #1.

Go to **Control Panel > Payment Options > Add** under payment plans.

Give your payment plan a name. If you want it to "automatically" be offered to your customers on their proposals, then check the box "auto include". In this example, we are requiring 50% deposit, with the balance due in one more payment, in a month. You also have the option to restrict payment plans to specific service types.

General

Name*

Active? ☒

Auto Include on Proposals? ☒

Order

Used to change the order in which plans display themselves to the contact

Description

Discount

Offer Code

Valid For

Number of days valid

Payment

Required Deposit Amount ☐ None ☐ First Payment Amount ☒ Percentage of Total ☐ Flat Amount

Pay Balance Using ☒ Installments ☐ Appointments

Interval Type*

Interval

Number of Payments*

First Payment Date

Used to force the first payment to a specific date.

Minimum Total

Prevents the customer from using this plan if the total is less than this amount. Only affects customer's online proposal.

Setup as many plans as you desire. Here's an example of "4 equal payments" plan.

General

Name*

Active? ☒

Auto Include on Proposals? ☒

Order

Used to change the order in which plans display themselves to the contact

Description **Make it easy on yourself -- pay for your stuff over four monthly payments.**

Discount

Offer Code

Valid For

Number of days valid

Payment

Required Deposit Amount ☐ None ☐ First Payment Amount ☐ Percentage of Total % ☒ Flat Amount

Pay Balance Using ☒ Installments ☐ Appointments

Interval Type*

Interval

Number of Payments*

First Payment Date

Used to force the first payment to a specific date.

Minimum Total

Prevents the customer from using this plan if the total is less than this amount. Only affects customer's online proposal.

Payment plans can also be added during invoicing, and/or after a customer has been invoiced.

Adding Installment Plan

On a proposal, you can Edit and have the option to add one or multiple plans, don't forget to click Save.

- Payment Plans
- ☐ 1 DAY AFTER APPT? - Pick up waste service - Pay \$79.55 upfront followed by 1 payments of \$79.55.
 - ☐ 12 Monthly Payments - Pay \$15.91 upfront followed by 12 payments of \$11.93 monthly.
 - ☐ 2 Payments - Installment - Pay \$79.55 upfront followed by 2 payments of \$39.78 weekly.
 - ☒ 3 equal payments - Pay \$79.55 upfront followed by 3 payments of \$26.52 weekly.
 - ☐ 3 Monthly Payments - Pay \$79.55 upfront followed by 3 payments of \$26.52 monthly.
 - ☐ Pay 100% Up front - Pay \$159.10 upfront
 - ☒ Pay in full - get 5% off - Pay \$79.55 upfront followed by 1 payment of \$79.55 weekly.
 - ☐ Pay In Full (No Deposit) - Includes 10% discount. Pay \$71.60 upfront followed by 1 payment of \$71.59 weekly.
 - ☐ Per Appointment - Pay \$79.55 upfront followed by 1 payments of \$79.55.

To add to an invoice, open the selected invoice. In the top right corner click the **Installment Plan** button. Select option best for the account, select payment method, enter date payment should begin, then enter card information, and **Save**.

On an invoice, you can even Change the plan once its been added.

Logged in as Heather Gamm | [Log Out](#)

Payments						
						Pay Write Off
Actions	Date	Amount	Type	Ref	By	
Installments						
						Change Plan
Action	Date	Amount	Balance Due	Status (0/1 complete)		
Run Edit Cancel	12/25/2024	\$27.06	\$27.06	Payment Failed (2)		



Do you notice in the image above showing the Payment Failed (?) allows you to click the question mark to learn details about why the payment failed.

Balance Due	Status (0/1 complete)
6	No card on file available (2)

Clicking on the Balancing Scale icon will allow you to update the balance to show new invoices with a balance due.

Rebalance Payments

This will rebalance any open installment payments to match the invoice's current balance due. The payments will be evenly divided based on the open balance. Are you sure you want to continue?

Yes No

Recurring Billing

Recurring Billing is an ongoing payment on a periodic basis for a product or service, it's a Subscription. You can create regular invoices and payments for any customer that can continue on a regular frequency (e.g., weekly, monthly or annually) until you stop it.

Click Here to Watch a Video Tutorial

Create a Recurring Billing Template

In Control Panel > Recurring Billing there are more options for setting up different billing cycles based on service.

Recurring Billing Templates						
Add...	Name	Created	Updated	Active	Frequency	End After
Edit Delete	Monthly Billing Plan	3/6/2024 9:05a	11/7/2024 1:32p	Yes	Every Month	

You can either capture deposits (to apply to future invoices) or create invoices using this feature. You can also select which Service the payment is going to and this will also allow you to send out specific Ad Hoc Email Templates.

Recurring Billing Plan

Name*

Monthly Billing Plan

Active?

☒

Frequency*

Every

1

Month(s) ▼

End After

None ▼

Type*

Invoices ▼

Amount

699

Quantity

Taxable

☒

Service*

Ghost Removal ▼

Remind Days Before

Ad Hoc Template

--Select one-- ▼

Skip Charge

☐

Prevent automatically charging the contact's saved payment information when the invoice is created.

Send Invoice

☒

Send the invoice after it's generated?

Setting Details

- **Type** - Selecting **Invoice** will generate an invoice for each bill in the plan. Choosing **Deposit** will generate a \$0 invoice and apply a payment to it. That way it'll be overpaid and usable as credit on future invoices.
- **Skip Charge** - If this checkbox is on, it will stop the system from automatically charging a card on file.
- **Send Invoice** - If the "Skip Charge" feature is off, this setting does not come into play. It only matters if you are skipping a charge for a recurring billing plan. If Skip Charge is on and this checkbox is also on, it will automatically send the invoice to the customer for payment.

Apply a Recurring Billing Plan to a Contact

After generating the Recurring Billing plan, you must go to the Contact Details page and add it. This must be done per customer, it cannot be done in bulk.

Additional Details
Research
Timeline

Notes (2)
Proposals (1)
Tasks (2/2)
Appointments (1)
Invoices (0)
Pictures
Documents

Emails (1)
Checklists
Assets
Texting
Feeds
Videos

☐ Invoices
☐ Payments
☒ Recurring
Statement

No data to paginate
Page size: 25

Add...	Name	Active	Type	Frequency	Quantity	Amount	Tax
No d							

Reviewing Recurring Plans

You can review active Recurring Billing plans in two places:

- On the Contact details page, by clicking the **Invoices** tab and selecting **Recurring**.

Additional Details
Research
Timeline

Notes (3)
Map
Proposals (3)
Tasks (3/3)
Appointments (2)
Invoices (23)
Pictures

Documents
Checklists
Assets
Texting
Drips (1)
Feeds
Videos

☐ Invoices
☐ Payments
☒ Recurring
Statement

Page 1 of 1 (1 items)
Page size: 25

Add...	Name	Active	Type	Frequency	Quantity	Amount	Ta
Edit	One Time	Yes	Invoices	Every Day	0	\$10.00	Co Plc

- Via the **Recurring Billings** tab in the **Shortcut** menu of your toolbar.

End a Recurring Billing Plan

You can end a Recurring Billing plan by editing the plan and either unchecking the **Active** box or entering an **End Date**.

Contact
Proposal
Schedule
Merge
Edit
Delete

Name: Billy Bob
Phone: (000) 000-0000 (Work) | Invalid 'To' Phone Number: +1000000XXXX
Service Address: 7917 kodax dr | Plano, TX 75025 | Copy
Drive: 18 mins (8.5 mi)
GeoZones: ☐ My Territory ☒ Plane
Named Tax Rate: Collin County-Plano-TX
Category: Customer
Lead Source: Direct Mail 1
Tags: De-ice
Active TaskBoards: New Board (State 1) ✖, Sales Board (New) ✖, Karen Progress Tracker (Final Design) ✖
Card on File: XXXXXXXXXX5454 - 08/2029 (Billy Bob) Clear
Consolidate Payments: No
Auto Pay: Yes
Lifetime Value: \$2,416.73

Additional Details
Research
Timeline

Notes (3)
Map
Proposals (3)
Tasks (3/3)
Appointments (2)
Invoices (23)
Pictures

Documents
Checklists
Assets
Texting
Drips (1)
Feeds
Videos

☒ Proposals
☐ Change Orders

Page 1 of 1 (3 items)

#	Date	Service	Status	Title	Total	Owner
Restore	10/17/2024	Honey	Expired	Honey	\$0.00	Kameron Ashley
Schedule	10/9/2024	Build Stuff	Complete	Build Stuff	\$100.00	Kameron Ashley
Restore	10/3/2024	3 day cleaning	Expired	3 day cleaning	\$2,120.50	Jessica Dammar


Common Uses

The most common use case for this feature is if you offer annual or semi-annual maintenance services, you can now set up customers, so they are billed monthly for the service, resulting in lower monthly payments and less objections to larger annual payments.

Failed payments work just like installment payments do. If a client's card is declined, we'll send them a notice so they can update it. We will try for 4 days after initial decline to collect payment)

Payment Reporting

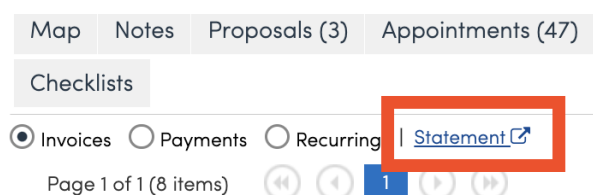
Automated pay options also include Installment Payments. The **Installment Payments** report tabulates data regarding customers' payments made as part of a plan. Each month containing payments is displayed and expandable to reveal all payments on each invoice by customer.

Installment Payments Report 					
Due Date	Contact	Invoice Number	Invoice Date	Amount	Status
3/13/2018	Alix	12563	3/13/2018	\$945.25	Payment Failed
Mar 2018				\$945.25	
4/13/2018	Alix	12563	3/13/2018	\$945.25	Payment Failed
Apr 2018				\$945.25	
5/13/2018	Alix	12563	3/13/2018	\$945.25	Payment Failed
May 2018				\$945.25	
6/13/2018	Alix	12563	3/13/2018	\$945.25	Payment Failed
Jun 2018				\$945.25	
Total				\$3,781.00	

FAQs

Are there any other ways of consolidating payments in ServiceMinder?

You can send Statements to customers, this is usually only done for Commercial clients. You can find this on the Contact Details page.



Another option if you have several invoices generated for a single customer is to Merge them into one. You can choose to keep duplicate line items separate or combine them when you are choosing Merge settings.

Invoice

Merge from...

Below are all other open invoices for this contact. Merge the selected invoices into the current invoice. All line items will be transferred over. Once the mer

Merge from

☐ I37889 - 03/28/2024 - \$256.25
☐ I378810 - 04/04/2024 - \$256.25
☐ I378814 - 04/25/2024 - \$410.00

Combine lines?

☐ Check this to combine lines with the same part, unit price, and taxable status. If disabled, all lines will be ad

Invoice I378813

View

Print

Edit

Settings

Merge

Bobby Boater

516 6th St

Saint Albans WV 26177

The third option is to go to **Control Panel > Invoices** and setup consolidated payments if you use auto pay. You can choose to email an invoice or not and what day or timeframe do you want to run those payments.

Payments

Consolidate Payments?

☒ Consolidate auto-pay appointment payments monthly

Send invoice?

☐ If a contact's payments are being consolidated, should they still receive an invoice email?

Consolidated Payments Day

The day of the month for processing all consolidated auto-pay appointment payments.

FAQ

Can I put multiple installment deposit payments on a single proposal?

Due to the nature of Proposal and Installment Plans, there is no way to allow customers to pay multiple deposits on a Proposal however you can take an internal payment and apply it to the proposal as an additional deposit.

Is there a way to have a payment plan start when the proposal is accepted?

There is no way to have a multiple payments added to the proposal unless internally added as an additional deposit. There is no way capture payments made unless you are just adding a note to the customers account. The Invoice is the method used to capture and track the payments made. We have no pre invoice method of tracking payments made that is not considered a deposit. And the nature of installments creates an Invoice for payment.

Troubleshooting

If I set up a recurring billing for example a year and break up the payment by 12 so they are paying a monthly amount for all services that year. Every time I complete there appointment (we schedule multiple appointments off of different parts of the proposal) is it going to invoice for that appointment or just go off the Recurring Billing I set up?

There are a few ways you can go about this.

If you are going to use Recurring Billing then you need to zero out the pricing on the appointments. If there is pricing on an appt it will generate an invoice, so you can schedule things like they are and then just have no pricing on the appts so that the recurring billing will take care of it.

Alternate option - use a payment plan. Invoice the proposal and apply a 12-month payment plan. But when scheduling like you are, you'll still want to make sure the appts don't have pricing.

Last option is to schedule the appts and let SM generate the invoice. You could try out consolidated billing along with that. The payment wouldn't be the same amount each month though, it would depend on what appointments fell within that timeframe.

I'm running into an issue with accounts that have chosen a payment plan, and upon approving the invoice (despite the "payment plan" drop down box is chosen), all payments are being processed at once after that approval.

The payment method is being selected when approving/saving the invoice. If that information is entered there then that amount will be charged instantaneously. This field pictured below is not required when Approving an invoice. It appears when editing/approving an invoice.

The screenshot shows a form for entering payment information. At the top, there is a header with the text "6854 10/31/2024 Service Call \$3,144.66". Below this, a tooltip box is displayed with the text: "This payment information is used to enter an initial payment that you have already received from the customer." The form fields include: "Payment Method" with a dropdown menu showing "-Select Payment Method-" and a small downward arrow; "Payment Amount" with a text box containing "150"; "Reference" with an empty text box; and "Invoice Date*" with a text box containing "11/5/2024".

I need to move a payment, but can't. I assume it is something to do with being an installment payment. How can we get that payment from invoice A to invoice B? Can we accomplish that without refunding the payment?

Installment payments can't be moved like regular payments. I think the best thing to do is to create a credit memo for the payment amount, put in the reference info for the CC payment, and apply that to the new invoice. Then on the old invoice, you'll refund the payment, **but uncheck the box to refund it to the processor** (you don't want to actually refund it, but only mark it as refunded in SM.)