

# Automatic Payments, Recurring Billing, and Consolidated Statements

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## Overview

ServiceMinder offers several flexible billing options designed to reduce manual work, improve cash flow, and simplify the customer experience.

This article explains how each option works, when to use it, and how they fit together.

Feature	What It Does	When to Use
<b>Automatic Payments (Auto-Pay)</b>	Securely charges a saved card or ACH when a job is completed.	To get paid automatically per job.
<b>Recurring Billing</b>	Creates scheduled invoices on a fixed timeline (weekly, monthly, quarterly, etc.).	For ongoing service contracts or subscriptions.
<b>Consolidated Payments</b>	Groups multiple Auto-Pay transactions into a single charge each month.	For repeat customers with many visits.
<b>Consolidated Invoices</b>	Sends one combined statement of all open invoices.	For customers who pay manually (check, e-transfer, etc.).

This article will review:

- [Automatic Payments](#)
- [Recurring Billing](#)
- [Consolidated Payments](#)
- [Consolidated Invoice Statements](#)
- [FAQs](#)

## Automatic Payments

Automatic Payments (Auto-Pay) allow you to charge a customer's saved payment method automatically when a service is marked complete.

This is the simplest way to get paid faster and eliminate manual billing.

Use Auto-Pay when:

- You want each completed job to charge automatically.
- Customers have authorized card or ACH information on file.
- You prefer faster payment turnaround.

## Configuration

### 1. Enable Auto-Pay on Services

Navigate to **Control Panel > Services**, Edit a Service, and find the **Invoicing** section. Check the **Auto Pay When Complete** box.

Auto Pay When Complete?

If enabled, invoices will be paid automatically when appointments are completed if the contact has a credit card on file.

## 2. Enable Auto-Pay for Contacts

On the **Contact Details** page, you can opt the contact in to **Auto Pay** by:

- Adding a payment method on file
- Checking the **Auto Pay** box

Edit Contact Bella Notte

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Basic Info  
Custom Fields  
**Payment On File**  
Service Address  
Billing Address

### Payment On File

Name on Card

Card Number

Expiration Date

Card Security Code

Account Type

Routing Number

Account Number

Allows this contact's installment payments to be consolidated into a single payment

Allows this contact to be eligible for automatic payments when completing Auto Pay services

## 3. Review General Payment Settings

Go to **Control Panel > Integrations > Payments**.

If **Card on File Optional** is checked, customers are allowed to choose if their card is saved on file. You can always enter their card information manually in the system, but if you want to save it automatically when they enter it themselves, make sure this box is **not** checked.

Integrations

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**Payments** Accounting Marketing Other Publishing

Credit Cards/eCheck?  
 Check this if you accept credit cards or eChecks. Allows you to connect your credit card processor to serviceminder to take payments directly

Accept American Express?  
 Do you accept American Express cards?

Card on File Optional?  
 Enable this to give your contacts the option to save their credit card on file for future payments on invoices only. Card is saved automatically if disabled. Does not apply to proposals where payment is collected.

Publish Credit Card Payments?  
 Enabling this will allow your payments to be synced with QuickBooks Online

## Using Auto Pay

If **Auto Pay** is on when the appointment is finished, and the contact has a card on file, an **Installment Payment** is automatically generated and scheduled to run shortly after completion. This will charge the contact's card, apply the payment to the invoice, and send them a receipt.

### Failed Payments

If the payment fails, the installment payment will be in failed status (listed in the **Failed Payments** snapshot) and will send a notification to the contact that it failed with a link for them to click and update their card on file. When they do this, the charge will try again immediately and the payment will be applied to the invoice.

The installment payment will continue to be tried daily up to 3 times until it is successful or runs out of retry attempts.

If the contact does not have a card on file, we will send them the invoice to prompt for payment and to store the card on file for future services.

## Recurring Billing

Recurring Billing lets you automatically create invoices for ongoing or subscription-based services — separate from job completion or Auto-Pay. It's ideal for memberships, seasonal plans, or service bundles billed on a schedule.

Use Recurring Billing when:

- You want predictable revenue cycles (e.g., "bill every 1st of the month").
- Services aren't tied to individual job completions.
- You need to pre-bill or post-bill customers regularly.

## Create a Recurring Billing Template

In **Control Panel > Recurring Billing** you can create templates that define billing schedules for one or more services. Templates let you manage billing frequency, invoice type, and charge behavior in one place.

Recurring Billing Templates													
<a href="#">Add...</a>	Name	Created	Updated	Active	Frequency	End After	Type	Amount	Quantity	Taxable	Service	Skip Charge	Send Invoice
<a href="#">Edit</a>   <a href="#">Delete</a>	Monthly Recurring Billing Plan	6/26/2024 11:46a	1/3/2025 1:19p	Yes	Every Month	12 Months	Invoices	\$100.00		Yes	Monthly Maintenance	No	Yes

### Important Settings

Setting	Description
Frequency	The interval at which this billing plan runs (e.g., monthly, quarterly, annually).

Setting	Description
<b>Type</b>	Defines how the payment appears on the contact's record: <ul style="list-style-type: none"> <li>• <b>Invoice</b> – Generates an invoice for each billing occurrence.</li> <li>• <b>Deposit</b> – Creates a \$0 invoice and applies a payment to it, which becomes a <b>credit</b> for future invoices.</li> </ul>
<b>Amount</b>	The dollar amount charged on each occurrence of the plan.
<b>Quantity</b>	Used only when your <b>Invoice Mode</b> for this service is set to <b>Accumulate</b> (for subscription-style credit tracking). Leave blank otherwise.
<b>Skip Charge</b>	If checked, the system will <b>not</b> automatically charge the card on file. Instead, an invoice will be sent to the contact.
<b>Send Invoice</b>	Works only if <b>Skip Charge</b> is ON. If both Skip Charge and Send Invoice are checked, the system automatically emails the invoice to the customer for manual payment.

#### Add New Recurring Billing Template

Name*	Monthly Billing Plan	Taxable	<input checked="" type="checkbox"/>
Active?	<input checked="" type="checkbox"/>	Service*	Monthly Maintenance
Frequency*	Every 1 Month(s)	Remind Days Before	2
End After	12 Month(s)	Ad Hoc Template	--Select one--
Type*	Invoices	Skip Charge	<input type="checkbox"/>
Amount	200	Send Invoice	<input checked="" type="checkbox"/>
Quantity		Prevent automatically charging the contact's saved payment information when the invoice is created.	
		Send the invoice after it's generated?	

## Add or Review Recurring Billing Plans on a Contact

To see active or historical billing plans for a customer:

1. Open the **Contact Details** page.
2. In the **Additional Details** section, go to the **Invoices** tab.
3. Select **Recurring** to view all current and past billing plans.

Additional Details

Notes (10) Map Proposals (16) Tasks (3/13) Appointments (53) **Invoices (68)** Pictures (10) Documents (1) Emails (113) Checklists

Feeds Custom Fields Videos (3) Referrals (1) Managed Contacts (1) Issues (2)

Invoices  Payments  **Recurring**  Include Managed? [Statement](#) [View Statement PDF \(Test\)](#)

Page 1 of 1 (1 items)

<a href="#">Add...</a>	Name	Active	Type	Frequency	Quantity	Amount	Tax Rate	Initial Date	End Date	Due On	Skip Charge
<a href="#">Edit</a>	<a href="#">One Time</a>	No	Invoices	Every Month	0	\$0.00	Tarrant County-Fort Worth-TX	6/18/2024		2/11/2025	Yes

[Create Filter](#)

#### 4. Click **Add** if you want to add a billing plan directly to this customer's account.

- Use the **Template** dropdown menu to choose a template that you've previously created.
- Fill in the information manually to create a custom billing plan.

You can also review all active Recurring Billing plans via the **Recurring Billings** tab in the **Snapshots** section of the navigation menu. This snapshot will not display in the menu until after you've got at least one active Recurring Billing plan in your organization.

The screenshot shows a navigation menu with a 'Snapshots' dropdown. The dropdown menu is open, showing various categories and their counts. The 'Recurring Billings' category is highlighted with a red box, and an arrow points to it from the 'Snapshots' header.

Category	Count
Open Invoices	52
Pulse	
At a Glance	
Projects	43
Accepted Proposals	13
Open Proposals	4
Backlog	\$1,890 / 13
Tasks	2
Issues	0
Unapproved Invoices	3
Print Queue	1
Schedule an Appointment	
Recent Activity	
Store Favorites	
Order History	
Failed Payments	1
<b>Recurring Billings</b>	<b>1</b>
Checklists	11

Recurring Billings

Filter All Active

25 Page 1 of 1 (10 items) 1 of 1

	Active	Contact Name	Type	Frequency	Service	Template	Quantity	Amount	Tax Rate	Due Date	Initial Date	End Date	Sk
<a href="#">(All)</a>	<input checked="" type="checkbox"/>	<a href="#">test</a>						100					<a href="#">(All)</a>
<a href="#">Edit</a>	<input checked="" type="checkbox"/>	<a href="#">Test Test 3</a>	Invoices	Every Month	Estimate	Five Times*		\$100.00	Kitsap County-Bremerton-WA	10/27/2025	4/30/2025		
<a href="#">Edit</a>	<input checked="" type="checkbox"/>	<a href="#">Test Test 2</a>	Invoices	Every Month	Estimate	Five Times*		\$100.00	Kitsap County-Bremerton-WA	10/27/2025	4/30/2025		
<a href="#">Edit</a>	<input checked="" type="checkbox"/>	<a href="#">Test Test 1</a>	Invoices	Every Month	Estimate	Five Times*		\$100.00	Kitsap County-Bremerton-WA	10/27/2025	4/30/2025		

## End a Recurring Billing Plan

You can end a plan from either the contact's record or the Recurring Billings grid.

1. Click **Edit** next to the plan you want to end.
2. Choose one of the following:
  - **Uncheck Active** to end the plan immediately, or
  - **Enter an End Date** to let the plan run until that date.

Once inactive, no new invoices will be generated for that plan.

Edit a Recurring Billing Plan

Name\*  
Monthly Billing

Active?  
 **End the plan immediately**

Type\*  
Invoices

Frequency\*  
Every 1 Month(s)

End Date  
11/13/2025 **End the plan on a set date**

## Common Uses

- **Maintenance Plans:** Offer annual or semi-annual service contracts billed monthly to make payments more manageable.
- **Subscription Credits:** Use “Deposit” type billing to prepay for a set number of future visits or service credits.
- **Prepaid Packages:** Bill clients upfront and apply credits automatically as jobs are completed.

## Consolidated Payments

If you have **Consolidate Payments** enabled, Auto Pay will still create the installment payment but it won't run the card. All Auto Pay generated installment payments will instead run on the configured day and time.

When consolidated payments run, it will group all pending installment payments from prior appointments, charge the contact's card for the total amount of those payments and then apply that payment to the corresponding invoices.



Consolidating payments does not affect the original invoices. If you have 4 appointments that each generated a \$25 invoice and consolidated payments are used, we will run a single charge for \$100 and apply that payment to all 4 invoices.

### Enable Consolidated Payments

1. Go to **Control Panel > Invoicing**, navigate to the **Payments** section and check the box **Consolidate Payments**.
  - Select a date and time to run payments each month and choose whether or not to send separate invoice emails. The invoice emails are separate from the receipt email, which will be sent once per month when the payment is run.

- Invoices
- Payments
- Terms
- Presentation

### 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

8

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

Run Installment Payments At

7:40a

The time of day to run installment payments (anytime between 8am and 7:45pm central time. Payments will not run outside this window). Any installments created after this time for the same day will still run that day.

2. Navigate to **Control Panel > Services**, edit the applicable service(s), and check the **Auto Pay When Complete** box.

Auto Pay When Complete?

If enabled, invoices will be paid automatically when appointments are completed if the contact has a credit card on file.

3. When adding or editing a contact, check the boxes for **Consolidate Payments** and **Auto Pay** to opt them in.



**Note:** When adding a new contact, Consolidate Payments will default to the organization-level setting. This means it will automatically default to "On" for all new added contacts if it is enabled for your organization and you must turn it off for any new contacts that you wish to exclude.

Allows this contact's installment payments to be consolidated into a single payment

Allows this contact to be eligible for automatic payments when completing Auto Pay services



If contacts are in a "Managed By" relationship, Consolidated Payments will apply as long as **both parent and child** are opted in to **Consolidate Payments** and **Auto Pay** AND the parent contact (manager) has a **card on file**.



Consolidated payments will **not** run if there is no payment on file (credit card or ACH). If you do not have a payment on file for a customer, but they want to pay multiple invoices at once with one payment, you can send them their **Statement Link** instead. Find the Statement Link via **Contact**

**Details Page > Invoices Tab.**

Additional Details

Notes (1) Map Proposals (5) Tasks (4/4) Appointments (8) Invoices (4) Pictures Documents

Emails (13) Checklists Assets Texting Drips (1) Feeds Custom Fields Videos

Invoices  Payments  Recurring Statement [↗](#)

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Reconcile...	Date	Number	Type	Service	Total	Balance Due	Date Paid	Service Date
<a href="#">Pay</a>   <a href="#">Resend</a>	8/12/2025	15184	Invoice	Installation	\$475.00	\$475.00		
<a href="#">Pay</a>   <a href="#">Resend</a>	4/10/2025	10748	Invoice	Installation	\$465.00	\$264.00		
<a href="#">Pay</a>   <a href="#">Resend</a>	8/13/2025	15231	Invoice	Residential Cleaning	\$198.60	\$198.60		
<a href="#">Pay</a>   <a href="#">Resend</a>	4/9/2025	10715	Invoice	Installation	\$20.00	\$20.00	4/11/2025	
					\$1,158.60	\$957.60		

## Transaction Error

If that transaction fails, we will send a notification to the contact and retry over the next two days. If the contact updates their card on file from the notification, we will run a single consolidated payment and apply to the open invoices.

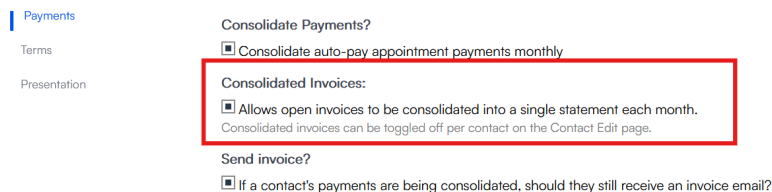
## Schedule

The auto-payments function only process payments between 8 a.m. and 8 p.m. in your timezone. This is intended to be a client-friendly favor so they aren't getting payment notifications on their phones at odd hours.

# Consolidated Invoice Statements

When Consolidated Payments is enabled, you can choose to send clients **one consolidated invoice per billing cycle** instead of an individual invoice for each appointment.

- **Enable at the organization level:** Go to **Control Panel > Invoice Settings > Payments** and select the **Consolidated Invoices** checkbox (requires Consolidate Payments to be enabled).



Payments

Terms

Presentation

Consolidate Payments?

Consolidate auto-pay appointment payments monthly

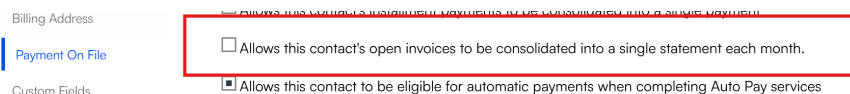
**Consolidated Invoices:**

Allows open invoices to be consolidated into a single statement each month.  
Consolidated invoices can be toggled off per contact on the Contact Edit page.

Send invoice?

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

- **Opt-out at the contact level:** From the **Contact Detail > Payment on File** section, you can turn off consolidated invoices for specific accounts.



Billing Address

**Payment On File**

Custom Fields

Allows this contact's open invoices to be consolidated into a single statement each month.

Allows this contact to be eligible for automatic payments when completing Auto Pay services

Each consolidated invoice is generated on the scheduled payment date. It includes all open invoices for the billing period with:

- Original invoice numbers, services, descriptions, and dates
- Full itemized breakdown and credits applied
- Account total due, payment status, and terms

Statements are:

- **Emailed automatically** to the primary contact and any CCs using the automated email template titled "Statement Ready Notification"
  - They will be emailed on the day of the month that is entered into the Consolidated Payments Day.
  - If Consolidated Payments are not set up, no payment will be charged but the invoice statement will still be sent.
  - Emails will include a link to view the statement on the web as well as a PDF copy of the statement for download.
- **Stored in the contact record** under the **Invoices tab > Statements** for re-download or resend by period (MM/YYYY)
  - Choose different statements by selecting a different date range using the "View Another Statement" dropdown menu

Service Provider



Billing/Service Address



Consolidated Invoice #:



Date:

Friday, August 29, 2025

Service Period:

Monday, July 28, 2025

Balance Due:

\$0.00

Available Credit: \$2,912.00  
Click here to apply it now.

View Another Statement: #STMT-9814836202508 - 7/28/2025 to 8/29/2025

Orig. Invoice	Date	Item	Description	Qty	Unit Price	Amount
I48208	8/21/2025	Install	Install the things.	1	\$400.00	\$400.00
I48206	8/21/2025	Install	Install the things.	1	\$200.00	\$200.00
I482011	8/21/2025	Install	Install the things.	1	\$800.00	\$800.00
I482011	8/21/2025	Bouncy Castle	Premium rental	1	\$1,000.00	\$1,000.00
I48207	8/21/2025	Install	Install the things.	1	\$300.00	\$300.00
I48209	8/21/2025	Install	Install the things.	1	\$500.00	\$500.00
I48209	8/21/2025	Glitter	Wow, shiny	4	\$3.00	\$12.00
I482014	8/21/2025	Install	Install the things.	1	\$100.00	\$100.00

Subtotal:	\$3,312.00
Tax:	\$0.00
Total:	\$3,312.00
Balance Due:	\$0.00

Make a payment

You may enter your payment information below to pay your balance of \$0.00.

## FAQs

**If we want consolidated payments to happen on the last day of the month, should we put 31? Or would putting 31 cause all the months that end in 30 or Feb to miss?**

Setting the consolidated pay date for 31 will run on the last day of each month (i.e., June 30 or February 28).

**How do I know if someone has their card on file?**

You will see it on their Contact Details Page. There is a **Card on File** section that appears with a blue pencil and an X next to it in case their cc information needs to be updated or you want to remove that cc completely.

**Will historical invoices be backfilled into statements with Consolidated Invoicing?**

No. Consolidated invoicing begins after your organization enables it. Past invoices remain as-is.