

Invoice Settings: Terms

10/21/2024 11:51 am CDT

Overview

Invoice Terms are flexible. An organization will need to set their "default" terms in Control Panel>Invoices. But, a user is also able to create several different Terms so, for instance, a specific Contact may have different due date terms on their Invoices compared to the default terms. Additionally, any invoice can be adjusted to override both Organizational and Contact-specific terms.

Video Tutorial

Here's a 2-minute video on Invoice Terms settings:

Your browser does not support HTML5 video.

Settings and Navigation

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.

Invoice Settings

Logged in as Karen Libby | [Logout](#)

Terms

Default Invoice Terms: **Default Terms** ▼

What invoice terms should be used by default

Add...

Name	Active	Created	Updated
Edit Delete Default Terms	Yes	10/18/2024 12:00a	10/18/2024 10:28a
Edit Delete 60-Day Commercial Terms	Yes	10/18/2024 10:27a	10/18/2024 10:27a
Edit Delete Net 30 / 1% Ten	Yes	10/18/2024 10:30a	10/18/2024 10:30a

[Create Filter](#)

2. ▼

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Finance Charge Rate: **1.5** %

The period rate for finance charges

Finance Charge Part: **Finance Charge** ▼

What part to use for finance charges

Auto Apply Finance Charges? ☒

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:

> Contacts > Adolfo Lopez - Mac Technologies > Edit Contact

Phone 3 --Select one--

Telephone --Select one--

Test Phone Number --Select one--

Email libbykaren@gmail.com ☐ Email Declined?

Email 2

Test Email - BB

Next Service Date --Select One-- ☐ Declined?

Category* Customer

Credit Hold? ☐

Tags ☒ AMPP ☐ Blue ☐ bub ☒ Carpet Cleaning ☐ Countertops ☐ CTA24 ☒ C
☐ Honey Badger Prospect ☐ Hurricane Katrina ☐ Landscape Lighting ☐ McKinnia
☐ Spring 2023 Premium Email ☐ Spring 2024 ☒ Spring Text Blast 2024 ☐ Test (SM

Add to TaskBoard --Select one--

Accounting Class --Select one--

Lead Source* Referral Existing Customer

Invoice Terms ☒ None
☐ 60-Day Commercial Terms
☐ Default Terms
☐ Net 30 / 1% Ten

Do Not Email

Do Not Mail

Referred By

Enter a portion of the name or address

Matches

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.

Invoice 6583

View Print Edit **Settings** Merge Void Delete Timeline

Gate Code 5678#

Bodie Kahuna (Woody.)

1453 E Plano Pkwy
Plano, TX 75074
(805) 704-1325 (Mobile)
Email to bugs@acme.com

Bill To

ACME Property Management
4052 Kyndra Cir
Richardson, TX 75082
(805) 704-1325 (Mobile)
[Copy Link...](#)

Status Open

Owner Karen Libby

Invoice Number 6583

Invoice Date 10/18/2024

Created At 10/18/2024 12:10p

Proposal [Holiday Lighting](#)

Settings for Invoice 6583 for Bodie Kahuna (Woody)

Contact

Bodie Kahuna
1452 E Plano Pkwy | Plano, TX 75074

Customer

☐ east

☒ multi-shape

Invoice Date*

10/18/2024

Delivery

Email

☒ bugs@acme.com

☐ wile.e.coyote@ACME.com

☐

Customer Note

Job Number

Total Payment Limit

Max Amount: \$100.00

Invoice Terms

Enter an amount or additional percentage to add to the Due Now amount to capture from the client

☒ None

☐ 60-Day Commercial Terms

☐ 90-Days

☐ Default Terms

☐ Net 30 / 1% Ten

Online Payments

☐ Voided?

☐ Downloaded?

☒ Summarize Pricing?

☐ Exclude from End of Month Report?

FAQs

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.