Accepting Payments

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Overview

Accepting payments in service**minder** is streamlined and flexible, supporting a variety of payment methods and gateways to help businesses get paid quickly and efficiently. This article provides a brief overview of how payments are accepted, configured, and managed within the service**minder** system.

This article will review:

- Settings and Navigation
- Payment Methods
- Recording and Managing Payments
- FAQs

Settings and Navigation

Before accepting payments, you'll need to configure your payment processor and custom payment methods:

Payment Processor

- Go to **Control Panel > Integrations > Payments** to enable and configure gateways. Supported gateways include Stripe, Authorize.Net, QuickBooks Payments, TSYS, WorldPay, and others.

Integrations
QuickBooks, payments, marketing and phone integrations.

Payment Methods

- Enable accepted payment methods—such as credit cards, e-checks (ACH), cash, paper checks, and digital wallets (e.g., Venmo, PayPal)—from the **Payments** or **Payment Options** tab.

Payment Options
Set up payment plans and additional payment methods for your customers.
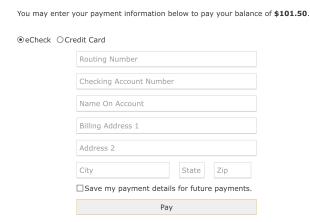
Learn more about payment processors and financing >>

Payment Methods

ServiceMinder supports a wide range of payment methods:

- **Credit & Debit Cards**: Accept payments online or over the phone using integrated gateways.
- **E-Checks/ACH**: Allow customers to pay directly from their bank accounts.
- **Cash & Paper Checks**: Record offline payments manually.
- **Custom Payment Methods**: Manually record payments received via your custom payment methods (i.e., Venmo, Paypal, etc).
- **Consumer Financing**: Offer financing through partners like Wisetack, letting customers pay over time while you receive full payment up front.

Recording and Managing Payments

- **Customer Payments**: Customers can make deposits on proposals or pay invoices through secure online forms.

You may enter your payment information below to pay your balance of **$101.50**.

◉ eCheck ◯ Credit Card

| Routing Number |
| Checking Account Number |
| Name On Account |
| Billing Address 1 |
| Address 2 |
| City | State | Zip |

☐ Save my payment details for future payments.

| Pay |

- **Internal Recording**: Team members can manually record payments against proposals, appointments, or invoices, including payment method, amount, date, and reference number.

- **Payment Plans & Recurring Billing**: Configure installment plans or recurring charges for ongoing services, with either manual or automatic tracking.

- **Receipts**: Email receipts can be sent to customers after payment is recorded.

FAQs

Q: How do I enable online payments for my customers?

A: Set up a payment gateway in **Control Panel > Integrations > Payments** and enable your preferred payment methods. Customers will then see online payment options on proposals and invoices.

Q: Can I offer payment plans or recurring billing?

A: Yes. You can configure installment plans and recurring billing for ongoing services per customer or service type. Click **HERE** to learn more.

Q: Is ServiceMinder PCI compliant?

A: Yes. All transactions are PCI-compliant and tokenized to protect sensitive information.