

Accepting Payments

05/12/2025 4:51 pm CDT

Overview

Accepting payments in serviceminder 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 serviceminder system.

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.
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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 |
| <input type="checkbox"/> Save my payment details for future payments. | | |
| <button>Pay</button> | | |

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

| | | | | | | | | |
|------------------------|------|--------|------|-----|----|----------------------|-----------------------------------|----------------------------|
| Payments | | | | | | <button>Pay</button> | <button>Installment Plan</button> | <button>Write Off</button> |
| Actions | Date | Amount | Type | Ref | By | | | |
| Internal Notes | | | | | | | | |
| No data to paginate | | | | | | | | |
| Add... | When | Note | By | | | | | |

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

| | | | | | | | | |
|------------------------|------|--------|------|-----|----|----------------------|-----------------------------------|----------------------------|
| Payments | | | | | | <button>Pay</button> | <button>Installment Plan</button> | <button>Write Off</button> |
| Actions | Date | Amount | Type | Ref | By | | | |
| Internal Notes | | | | | | | | |
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| Add... | When | Note | By | | | | | |

- **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.
