

Proposals and Invoices in the Mobile App

09/04/2026 1:43 pm CDT

Overview

From pricing additional work to collecting payment, the mobile app lets you keep more of the sales and billing process connected to the customer and job you're already working on. You can create and send proposals, track customer activity, turn approved work into an invoice, and collect payment without needing to switch to the web.

This article will review:

- Create a Proposal While You're With the Customer
- Send a Proposal for Customer Approval
- Track Proposal Activity and Follow Up
- Create an Invoice From the Work
- Collect Payment on the Spot
- Approve Invoices From the Field

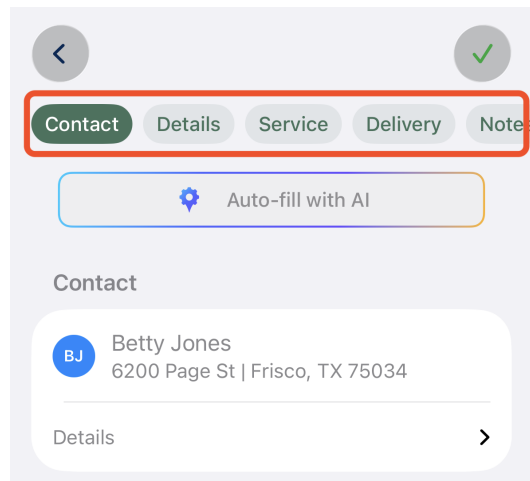


Note: The features and options you see in the ServiceMinder mobile app may vary based on your device and operating system, app version, user permissions, and your organization's configuration.

Create a Proposal While You're With the Customer

When a customer asks about additional work, you can build a proposal directly from their contact or appointment instead of waiting until later.

The proposal form is organized into sections that take you from the basic details through the work being proposed, delivery, notes, and any required deposit. Use the **section shortcuts** at the top of the screen to jump between sections without scrolling through the entire form.



Add the Proposal Details

Start in **Details** by entering the proposal **Title**, **Date**, and **Expires** date.

A screenshot of the 'Details' form in the mobile application. The form is titled 'Details' and contains three input fields. The first field is labeled 'Refrigerator Repair'. The second field is labeled 'Date' and has a date picker showing 'Sep 3, 2026'. The third field is labeled 'Expires' and has a date picker showing 'Dec 2, 2026'.

These details help identify the proposal and control how long the offer remains valid.

Add the Services You're Proposing

Next, choose the service associated with the work.

You can either add a **standalone service** or start from a **template** your organization has already built. Selecting a template fills the proposal with its preconfigured services and parts, giving you a faster starting point when the work follows a standard package.

Service *

Template

None >

Kitchen Appliance Repair

>

Diagnostic and repair service for common kitchen appliances such as refrigerators, dishwashers, ovens, ranges, and microwaves. Parts and

Quantity

−

1

+

Base Price

\$ 129.00

Unit Price

\$ 0.00

Subtotal

\$129.00

Once a service is added, you can:

- Set the **quantity**.
- Adjust the **price** if your permissions allow it.
- Edit the service description.
- Use the **ServiceMinder AI icon** to refine the description when that option is available.

Build from Multiple Templates

If you need items from more than one service package, you can select multiple templates that use the **same service**. Their line items combine into one proposal instead of replacing one another.

<

>

Kitchen Appliance Repair

☐

Appliance Repair with Appliance Care Upgrade

Standard House Cleaning

☐

Bronze Cleaning Package

☒

Gold Cleaning Package

☒

Silver Cleaning Package

This gives you the flexibility to customize the scope while still using the pricing and line items your organization has already configured.

Add the Line Items

Use the **Line Items** section to add the parts needed for the work.

For example, a proposal for an **Appliance Repair** service might include parts such as a **Refrigerator Door Gasket Replacement** and **Refrigerator Water Inlet Valve Replacement**.

Line Items

Refrigerator Water Inlet Valve Replacement

\$145.00

Qty: 1 >

Replacement of a standard refrigerator w...

45 min

Refrigerator Door Gasket Replacement

\$135.00

Qty: 1 >

Replacement of a standard refrigerator d...

30 min

+ Add Line Item

>

Duration

2 Hours and 45 Minutes

Includes 1 Hour and 15 Minutes from parts

Total

\$409.00

To remove items, swipe left.

Line Items

Additional Bathroom Cleaning

\$25.00

Qty: 1 >

Adds a full cleaning of one bathroom beyo...

15 min

Interior Window Cleaning

\$64.00

Qty: 8 >

Interior cleaning of one standard-size win...

64 min

Refrigerator Interior Cleaning

\$35.00

Qty: 1 >

Cleaning of accessible refrigerator shelve...

25 min

Bed Linen Change

\$12.00

Qty: 1 >

Removal of existing bed linens and installa...

10 min

Pet Hair Treatment

\$30.00

Qty: 1 >

Extra vacuuming and surface treatment fo...

20 min

+ Add Line Item

>

Duration

4 Hours and 14 Minutes

Includes 2 Hours and 14 Minutes from parts

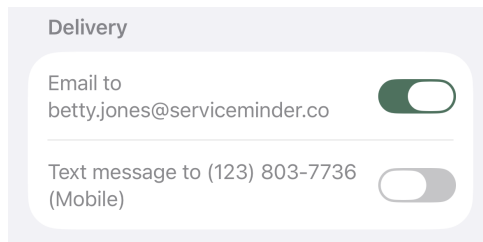
Total

\$341.00

As you add services and parts, ServiceMinder also calculates the proposal's **Duration** based on the durations configured for those items. The calculated duration is shown for reference and cannot be edited directly from the proposal.

Choose How to Deliver the Proposal

Under **Delivery**, choose how the customer should receive the proposal. Use the available toggles to send it by email, text message, or both.



Delivery

Email to
betty.jones@serviceminder.co ☒

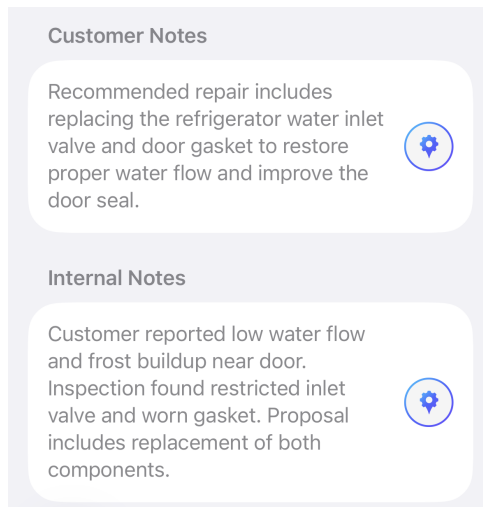
Text message to (123) 803-7736
(Mobile) ☐

The available email address and phone number come from the customer's contact information.

Add Customer and Internal Notes

The **Notes** section gives you two places to capture additional context:

- **Customer Notes** are included with the proposal for the customer to see.
- **Internal Notes** stay within ServiceMinder for your team.



Customer Notes

Recommended repair includes replacing the refrigerator water inlet valve and door gasket to restore proper water flow and improve the door seal.

Internal Notes

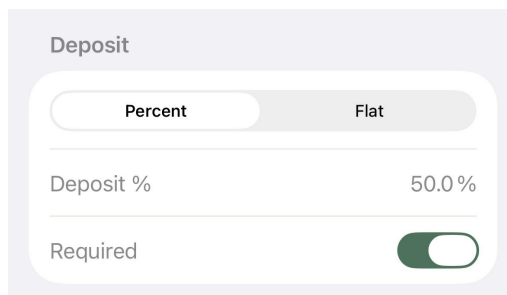
Customer reported low water flow and frost buildup near door. Inspection found restricted inlet valve and worn gasket. Proposal includes replacement of both components.

This lets you keep customer-facing explanations separate from information your team may need internally.

Configure a Deposit

If a deposit is needed, use the **Deposit** section to choose either a **percentage** or **flat amount**.

You can also choose whether the deposit is **required**, depending on how you want the customer to move through the proposal acceptance process.



Deposit

☒ Percent ☐ Flat

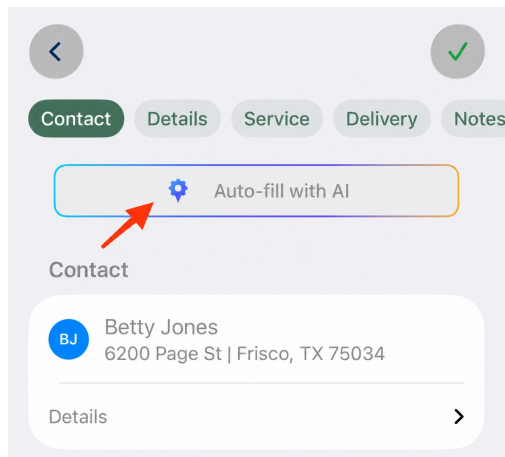
Deposit % 50.0 %

Required ☒

Use Auto-Fill with AI

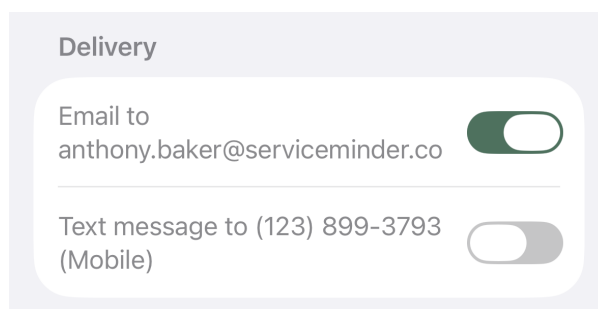
Auto-Fill with AI can use a short description to populate supported proposal fields, including selecting a service (when it can determine the appropriate one). It does not fill custom fields. Always review the

proposal before saving or sending it.



Send a Proposal for Customer Approval

When the proposal is ready, choose whether to deliver it by **email, text, or both**, then tap the green check mark and select **Save and Send**.



The customer receives a link where they can review the work and complete the acceptance process online.

Proposal



Date: 8/20/26
Total: **\$246.00**
Expires: 11/18/26

Acme Home Services Plano

1500 E Plano Pkwy
Plano, TX 75074
(972) 555-0199

Billing/Service Address

Paul Ramirez
5400 Lake Forest Dr
McKinney, TX 75071
(123) 210-6133

Item	Description
Kitchen Appliance Repair	Diagnostic and repair service for common kitchen appliances such as refrigerators, dishwashers, ovens, ranges, and microwaves. Parts and major repairs are quoted separately when needed.
☒ Appliance Care Upgrade	
Appliance Deep Clean	Cleans accessible vents, coils, burners, drip areas, and surrounding buildup to help the appliance operate efficiently.
Preventive Maintenance Inspection	Inspects common wear points, connections, seals, and accessible components for signs of developing problems.

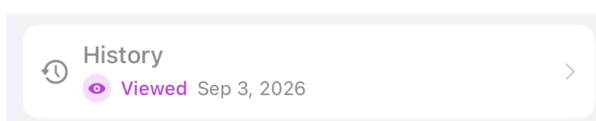
Accept

Decline

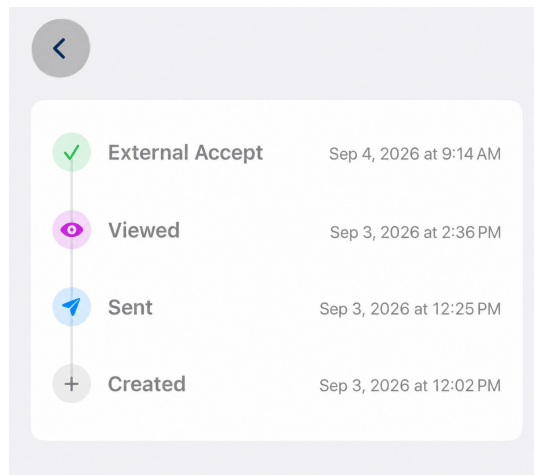
This lets you move from discussing the work to getting a decision without having to recreate the proposal or follow up from another system.

Track Proposal Activity and Follow Up

After you send a proposal, you can review its activity from the mobile app instead of guessing whether the customer has seen it.



Proposal **History** can show milestones such as when the proposal was **created, sent, viewed, and accepted**. Invoices also show a similar timeline of events.



That gives you more context before following up. You can see whether the customer has engaged with what you sent and focus the conversation on what still needs to happen.

Create an Invoice from the Work

Invoices can be created directly in the mobile app, generated from an accepted proposal, or created automatically as part of finishing an appointment. The path you use depends on where the work started and how your organization has configured the related service.

Create an Invoice from Scratch

Creating an invoice manually follows a very similar process to creating a proposal. The forms are nearly identical, so if you're already familiar with the proposal workflow, the invoice form should feel familiar too.

As you work through the form, you can add the invoice details, select the services and parts being billed, review pricing, choose how the invoice should be delivered, and add customer-facing or internal notes.

Use the **section shortcuts** at the top of the form to jump directly to the part of the invoice you need without scrolling through the entire page.

Generate an Invoice from a Proposal

If the customer has already accepted a proposal, you can generate an invoice directly from that proposal rather than rebuilding the work from scratch.

1. Open the proposal.
2. Tap **Invoice**.
3. Choose how much of the proposal you want to invoice:
 - **Full amount**
 - **Percentage**
 - **Flat amount**
4. Enter the amount or percentage when needed.

5. Tap the **green check mark** to generate the invoice.

This is useful when you're billing in stages or only need to invoice part of the approved work at one time.

Generate an Invoice When You Finish an Appointment

For many services, the invoice is generated automatically as part of the appointment finish workflow.

Work the appointment as usual, then:

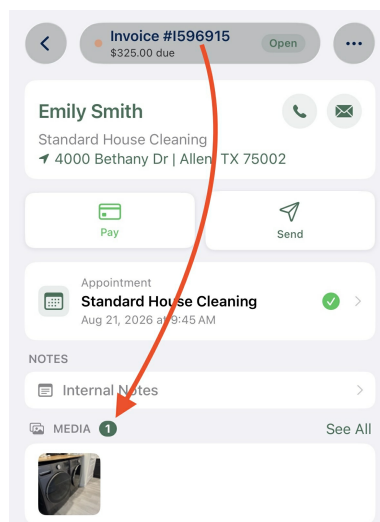
1. Tap **Finish** when the work is complete.
2. Review and complete any required **Finish Info**.
3. Review the pricing associated with the appointment.
4. Tap **Submit**.
5. ServiceMinder generates the invoice automatically when the appointment is submitted.

You don't need to leave the appointment and create the invoice separately. Once it's generated, you can move directly into the invoice to send it or continue into payment.



Worth knowing: Invoice behavior depends on the configuration of the service. Some services may be set to invoice manually or at another point in the workflow. Appointments with no billable amount, such as certain subscription or recurring-service visits, may also finish without generating a new invoice.

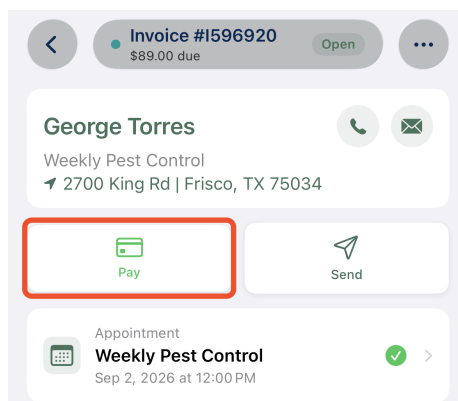
Include Job Photos with the Invoice



Photos associated with the linked appointment will appear directly on the invoice detail. That gives you and the customer more context around the work being billed without having to go back through the appointment to find supporting photos.

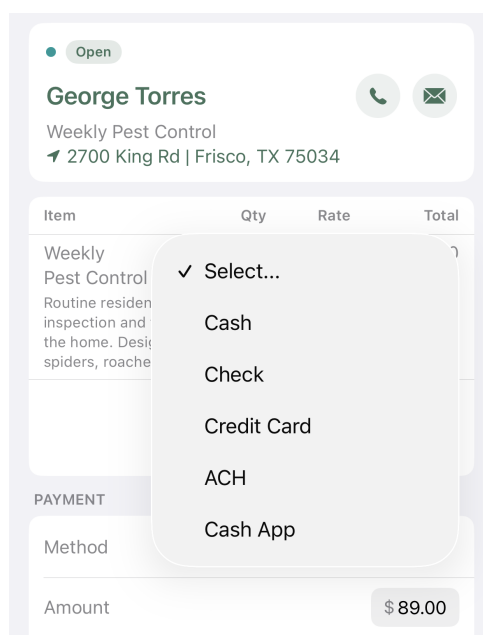
Collect Payment on the Spot

When the customer is ready to pay, you can collect payment directly from the invoice.

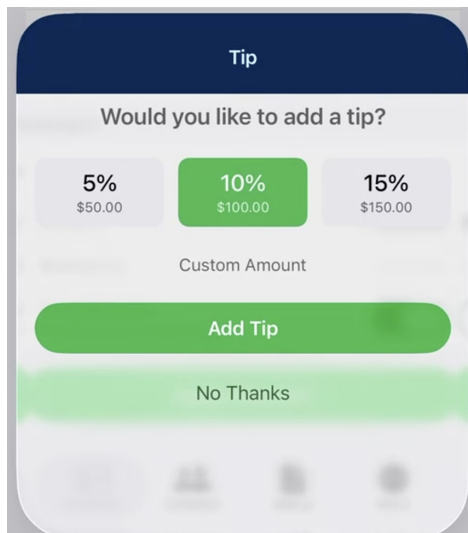


Depending on your organization's configuration, available payment methods may include:

- **Cash**
- **Check**
- **Credit Card**
- **ACH/E-Check**
- **Custom payment types** (configured by your organization in Control Panel > Payment Options)



If tipping is enabled (found under the **More** tab in the mobile app), the customer can also choose from preset tip percentages or enter a custom amount as part of the payment experience. Tipping is built directly into the invoice payment flow.

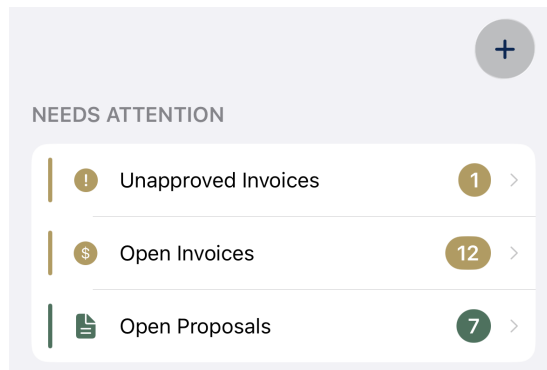


This makes it possible to move from completed work to invoice to payment while you're still with the customer, reducing the amount of follow-up needed later.

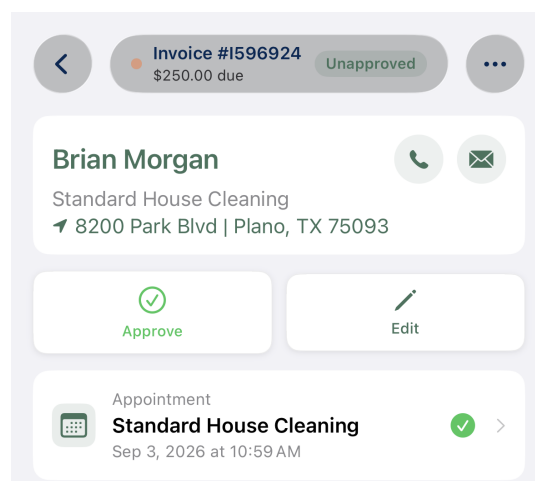
Approve Invoices from the Field

If you have invoice approval permissions, you can review and manage invoices that still need approval directly from the app to keep billing moving even when you're away from your desk.

Unapproved invoices will appear under **Billing > Needs Attention**.



From there, you can open the invoice then review, edit, and approve it without switching to the web.



Need to remove approval? Tap the three dots in the corner and select **Unapprove**.

