Payments and Billing in the Mobile App

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Overview

The ServiceMinder mobile app helps you keep the financial side of the job moving without waiting until you're back at a computer. You can collect payment from an invoice while you're with the customer, give them the option to add a tip, and use the **Billing** tab to see what needs follow-up and get a quick read on the business.

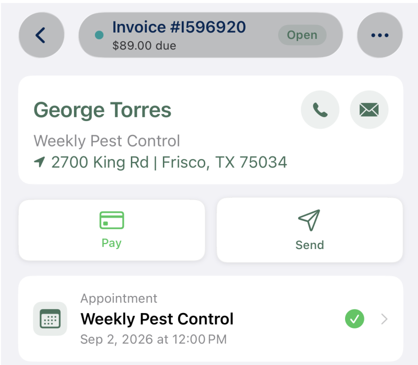
This article will review:

- Collect Payment on the Spot
- Give the Option to Tip
- Collect a Deposit on a Proposal
- Track Billing Activity and Business Performance

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

Collect Payment on the Spot

When an invoice is ready, you can collect payment directly from the mobile app instead of turning it into another follow-up for later. If an invoice is generated when you finish an appointment, ServiceMinder also gives you the option to send the invoice or collect payment on site as part of the same workflow.

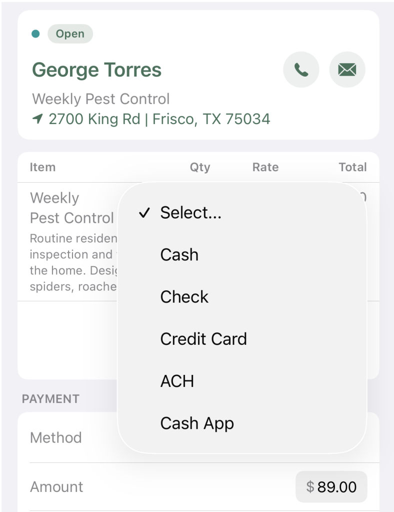


To collect a payment:

1. From **Schedule**, open the appointment and select the linked **Invoice**.
2. Tap **Pay.**
3. Choose the customer's payment method:

- **Cash or Check**
- **Credit Card** — enter the card number, expiration date, and CVV directly in the app.
- **ACH / eCheck** — available for organizations using ServiceMinder Pay. Enter the customer's routing and account information.
- **Other** — record that you received a payment outside of the ServiceMinder system. These custom payment types will vary based on your configurations in **Control Panel > Payment Options**.

4. **Optional:** Enable **Send Receipt** to send a receipt to the email on file.
5. Review the amount before submitting.
6. Tap **Submit Payment**.



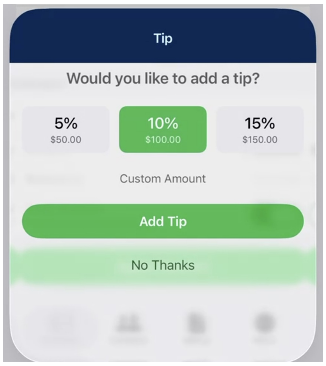
After the payment is completed, ServiceMinder shows a confirmation with the amount, date and time, and reference number, and the invoice balance updates.

Give the Option to Tip

If tipping is enabled for your organization, the customer can add a tip as part of the invoice payment experience. Preset percentages make it easy for them to choose an amount without calculating it themselves.

This makes tipping a natural part of checkout for the customer—and one fewer awkward conversation for your Service Agent.

Tipping can be enabled from **More > Feature Toggles** in the mobile app when the setting is available to you.

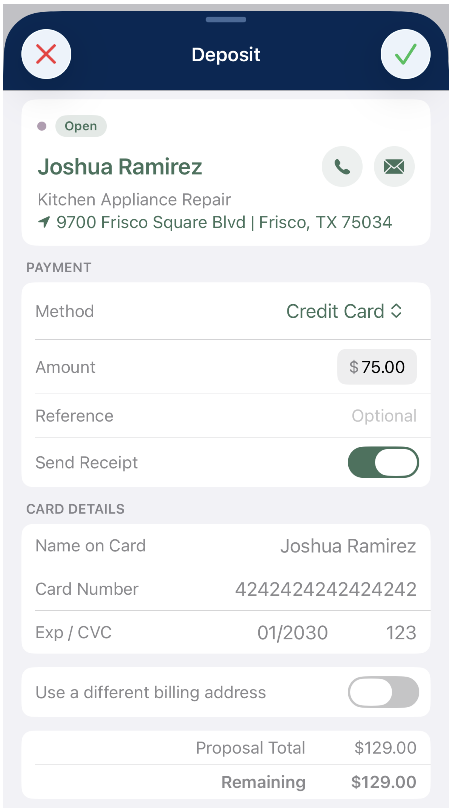


Collect a Deposit on a Proposal

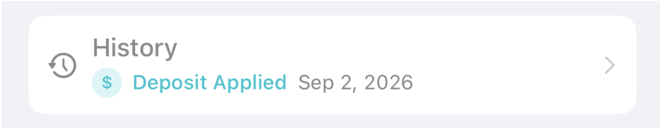
Deposits are tied to **proposals** rather than invoices and can be collected directly from the mobile app.

To collect a deposit:

1. Open the contact or appointment associated with the proposal.
2. Open **Proposals** and select the open proposal.
3. Tap the three dot menu and select **Add Deposit**.
4. Enter the deposit amount and choose the payment method.
5. **Optional:** Turn on **Send Receipt** to email the customer a receipt.
6. Tap **Submit**.



The deposit is recorded against the proposal, and an invoice is generated automatically once the proposal is accepted.



Tip: If the proposal is configured to require a deposit before acceptance, the customer will be prompted to pay it as part of the acceptance process. You don't need to collect the deposit manually first.

Track Billing Activity and Business Performance

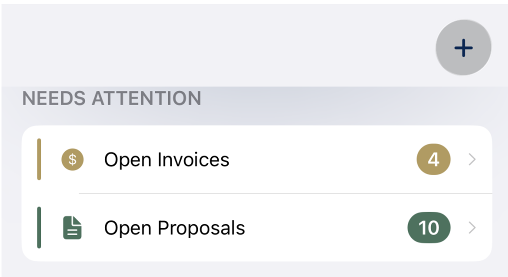
The **Billing** tab is useful for more than looking up an invoice. It brings together items that may need action, business-performance information, and direct access to proposals and invoices.

Depending on your permissions and organization configuration, the information available here may vary.

Follow Up on Items That Need Attention

At the top of Billing, **Needs Attention** surfaces outstanding items that may require follow-up. This section updates dynamically based on activity in your organization, so the categories and items you see may change from day to day.

Rather than searching through every proposal or invoice, you can start here to see where something may need action.



Check Business Performance at a Glance

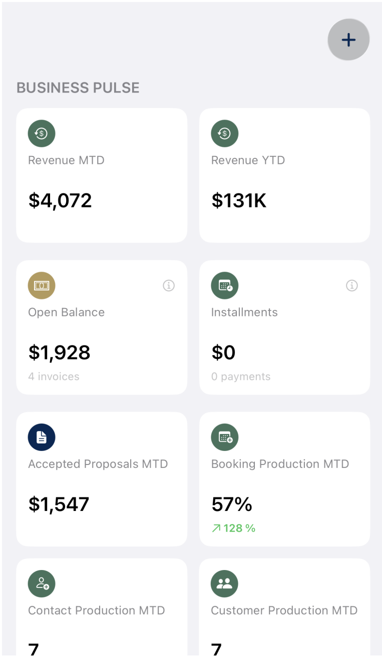
Business Pulse gives owners, admins, and other users with access a series of snapshots of business performance without requiring them to build a report or return to the web application.

Depending on what you're trying to understand, you can move between snapshots for information such as:

- **Revenue MTD and YTD**
- **Open Balance**
- **Installments**
- **Accepted Proposals MTD**
- **Booking, Contact, and Customer Production**
- **Acquisition and Retention**

- **Reworks**
- **Contacts**

For example, **Open Balance** shows the total unpaid balance across open invoices, while**Installments** shows the remaining balance scheduled on active installment plans.



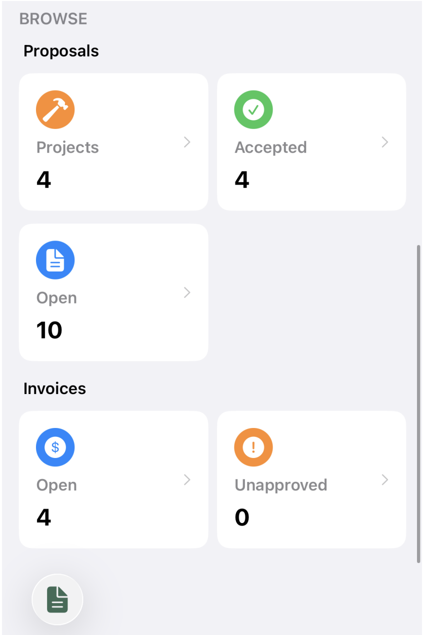
This makes Billing useful not only when something needs to be paid, but when you need a quick answer to *"How are we doing?"*without sitting down at a computer.

Browse Proposals and Invoices

When you need to move from the high-level view into the actual records, use**Browse**.

From here, you can access:

- **Proposals**, including projects, accepted proposals, and open proposals.
- **Invoices**, including open and unapproved invoices.



This gives you a direct path to the underlying work when a Business Pulse number or an outstanding item tells you that something needs a closer look.

Review and Approve Invoices

If your user has invoice approval permissions, you can also review invoices that are waiting for approval directly from the mobile app.

Open an unapproved invoice to review it and take the available approval action without needing to switch to the web. Unapproved invoices are also available through **Billing > Browse > Invoices**.

For owners, managers, and office teams, this helps keep billing moving even when you're away from your desk.