Invoice Settings

Last Modified on 06/20/2023 1:08 pm PDT

The settings page for Invoices enables you to:

- Upload a logo to display on an invoice.
- Configure the “From” address and contact information to appear on an invoice.
- Configure the tax rate that will default when you create an invoice.
- Create the payment terms.
- Configure any notes that you want to display on your invoice footer.
- Enable partial payments.
- Enable ACH payments.
- Enable email reminders and overdue notices for customers.

Add a logo to your Invoice

Go to **Administration**, click ***Settings***, and then click the ***Invoice*** tab. The logo will appear in the invoice Header.

Customize your invoice by adding your company logo:

1. Click on ***Click or drag files here***.
2. Locate your logo and click on ***Open***.
3. After the logo is uploaded, click the ***Save*** button on the upper right-hand side of the settings page.

> *Note: Your logo cannot exceed 2MB in size and must be in a PNG file format.*

Edit the From Address

Go to ***Administration***, click ***Settings,*** and then click the ***Invoice*** tab.

Edit the business address presented on an invoice. Your business address is auto-populated from the information currently on file with Qualpay. You can change the address and contact information displayed on your invoices.

To edit the business address:

1. In the *From* section, click the Edit icon. In the pop-up window, you can change the *Business Name* and *Address*, along with the *telephone* and *email address*.
2. Click ***Update*** to save your changes and close the pop-up window.
3. Click the ***Save*** button on the upper right-hand side of the settings page.

> *Note: Updating the Business Address for invoices does not update the address that Qualpay has on file for your account. If you would like to change the official business address, please email support@qualpay.com.*

Add a default Tax Rate

Go to **Administration**, click ***Settings***, and then click the ***Invoice*** tab. Scroll down to view the *Tax Rate*.

Configure the tax rate that will default when you create an invoice:

1. Enter the percentage of tax you want to charge your customer in the box next to *Tax Rate*.
2. Click the ***Save*** button on the upper right-hand side of the settings page.

Note: The tax rate may not exceed 20%.

Configure the Payment Terms and Footer Notes

Go to **Administration**, click ***Settings***, and then click the ***Invoice*** tab. Scroll down to view *Payment Due* and *Payment Terms*.

By default, *Payment Due* is set to **On Receipt**. Payment will be due on the day that the customer receives the invoice.

To update the payment due date:

1. Click ***In # Days*** and specify the number of days you want to receive the invoice payment. For example, the net payment is due in 7, 10, 30, or 90 days.
2. Click the ***Save*** button on the upper right-hand side of the settings page.

Set up a customized message for your invoice payment terms:

1. Enter a customized message in *Payment Terms*. The message will appear on the invoices you send.
2. Click the ***Save*** button on the upper right-hand side of the settings page.

Add footer notes that will appear under at the bottom of the invoice:

1. Type a customized message in *Footer Notes*. The message will appear on the invoices you send.
2. Click the ***Save*** button on the upper right-hand side of the settings page.

Enable Partial Payments

Go to **Administration**, click ***Settings***, and then click the ***Invoice*** tab. Scroll down to view the *Payments Page* section.

You can set up your account to accept partial payments from your customers:

1. Click the toggle for ***Allow Partial Payments*** to set to *Yes*.
2. Click the ***Save*** button on the upper right-hand side of the settings page.

> *Note: If you do not enable partial payments on the settings page when you create an invoice, the toggle on the invoice template will be disabled by default.*

Enable ACH Payments

Go to **Administration**, click ***Settings***, and then click the ***Invoice*** tab. Scroll down to view the *Payments Page* section.

You can set up your account to accept ACH payments from your customers:

1. Click on the check box for ***Allow ACH Payments*** to have a green checkmark.
2. Click the ***Save*** button on the upper right-hand side of the settings page.

> *Note: If you do not enable ACH payments on the settings page when you create an invoice, the toggle on the invoice template will be disabled by default.*

Email Customer Notices

Go to **Administration**, click ***Settings***, and then click the ***Invoice*** tab. Scroll down to the **Notifications** section.

To send a reminder notice to your customers x days before an invoice is due:

1. Click on the toggle for ***Email customers a reminder notice?*** to set it to *Yes*.
2. Specify the number of days before the invoice due date to send an automated reminder email.
3. Click the ***Save*** button on the upper right-hand side of the settings page.

To send an overdue notice x days after an invoice is due:

1. Click on the toggle for ***Email customers an overdue notice?*** to set it to *Yes*.
2. Specify the number of days after the invoice due date to send an automated reminder email.
3. Click the ***Save*** button on the upper right-hand side of the settings page.

Note: To turn emailed receipts on or off, you must change them in the [Receipt Configuration](#).