

Receipts

Last Modified on 08/03/2023 5:16 pm PDT

You can set up your Qualpay account to automatically send email receipts to your customers whenever a transaction is processed. Sending receipts to a customer at the time of payment is a good practice. You can resend a receipt at any time by locating the transaction in the [Transactions](#) report.

We support different email receipt profiles, which match a [Qualpay Payment Profile](#). The Qualpay Payment Gateway and Checkout support the Profile ID passing to identify which email receipt profile to use. This is a useful feature when supporting multiple product brands on the same account.

For those not using Qualpay products to initiate your transactions, please refer to your third-party payment gateway portal to access your receipt settings.

Receipt Configuration

To configure your receipts for Qualpay products - [Qualpay Checkout](#), [Virtual Terminal](#), [Payment Gateway](#), [Invoicing](#), or [Recurring Billing](#):

1. Select **Administration** from the main menu.
2. Click **Settings** then select the **Receipts** tab.

The initial Receipt Profile is the Default profile in use by all products. By default, Qualpay has prefilled minimal information, just in case you start sending receipts before you configure this section for your account.

In the Receipts tab, you can customize the table's attributes below and select **Save Receipt Profile**.

To create an additional Receipt Profile:

1. Click **New Receipt Profile**.
2. Enter a Receipt Label for your reference.
3. Select one or more Payment Profiles from the *Payment Profiles* drop-down.
4. Customize the attributes in the table below and select **Create Receipt Profile**.

Once a new Receipt Profile is created, you can switch between the available profiles using the drop-down at the Receipts page's top left-hand side. When viewing a Receipt Profile other than the default, you will have the option to change the status from *Active* to *Disabled*.

Option	Required/Optional	Comments
From Name	Optional	Your name as you would like it to appear in your customer's inbox.
Header Address	City and State are required	This address will appear in the receipt header. The city and state are required at a minimum.
Header Phone Number	Optional	This phone number will appear in the receipt header. This phone number should be a customer service number for payment inquiries.

Option	Required/Optional	Comments
Header email Address	Optional	This email address will appear in the receipt header. This email address should be a customer service email for payment inquiries.
Reply to email Address	Optional	If your customer replies to an emailed receipt, we will populate the "To" address with this email address.
Header Website Address	Optional	This website address will appear in the receipt header.
Footer Text	Optional	This footer will appear at the bottom of your receipt. It may contain information about your return policy or other terms and conditions.
Sub Footer Text	Optional	This footer will appear below the footer text in a smaller font.
Display Line Items	Optional	If you include line items with your transaction, you can optionally display them on the receipt.
Display Billing Information	Optional	When a complete billing address, including street address, city, state, and zip code, is submitted with the transaction, you can optionally display it on your customer's receipt.
Display Shipping Information	Optional	When a complete shipping address, including street address, city, state, and zip code, is submitted with the transaction, you can optionally display it on your customer's receipt.
Display Merchant Reference Number	Optional	Display the merchant reference number on the receipt.
Display Purchase ID	Optional	Display the Purchase ID on the receipt.
Display Payment Gateway ID	Optional	Display the Payment Gateway ID on the receipt.
Receipt Logo	Optional	Upload your company logo for your receipts. Receipt logos should be 180-600px wide, and 90px in height. Receipt logos also should be in png format and be less than 2M.

NOTE: City, State, and Country are required to comply with card brand rules.

Configure When to Send Customer Receipts

To configure if your customer is sent a receipt - [Qualpay Checkout](#), [Virtual Terminal](#), [Invoicing](#), or [Recurring Billing](#):

1. Select **Administration** from the main menu.
2. Click **Notifications** then select the **Receipts** tab.
3. Select **Virtual Terminal**, **Invoice**, **Checkout**, or **Subscription** to configure receipts for each product.
4. Set the toggle for **Email receipt to your customer** toggle to *green* on each product tab you wish to send your customer a receipt.

NOTE: You will only see receipt configuration options for products you have enabled on your account. Contact Qualpay support to have additional products enabled for your account.

Some of these settings can be overridden at the time of the transaction. For example, you can choose to send an email receipt when you process each individual Virtual Terminal transaction instead of enabling the receipt toggle in the Notifications tab.

Configure When to Send Yourself Copy of Receipts - Virtual Terminal

To configure if you are sent a copy of the receipts for [Virtual Terminal](#):

1. Select **Administration** from the main menu.
2. Click **Notifications** then select the **Receipts** tab.
3. Select the **Virtual Terminal** tab.
4. In the **Send me a copy** section, select the transaction type you would like a copy of a receipt for by clicking the toggle so it is *green*.
5. Enter the email address(es) that you would like to receive copies of the receipt and then click **Add Email**.
6. Continue until all transaction types you would like to configure are completed.
7. Click **Save Receipts** to save the changes made.

Configure When to Send Yourself Copy of Receipts - Qualpay Checkout, Invoicing, or Recurring Billing

To configure if you are sent a copy of the receipts - [Qualpay Checkout](#), [Invoicing](#), or [Recurring Billing](#):

1. Select **Administration** from the main menu.
2. Click **Notifications** then select the **Receipts** tab.
3. Select **Invoice**, **Checkout**, or **Subscription** to configure receipts for each product.
4. Enter the email address(es) that you would like to receive copies of the receipt in *Send me a copy* and then click **Add Email**.
5. Click **Save Receipts** to save the changes made.

Send Receipt at the Time of a Transaction - Virtual Terminal

To send a receipt to your customer while processing a transaction through Qualpay [Virtual Terminal](#):

1. Select **New Transaction**.
2. Click on [Sale](#), [Authorization](#), [Force](#), or [Credit](#).
3. In the **Customer Information** section, add the email address where you want to send the receipt.
4. Click **View Receipt**. The receipt provides the option to either email or print.
5. Click **Yes** next to **Send Receipt?**.

NOTE: Once the transaction is processed, the receipt will be automatically sent. You can only send a receipt to one email address using this method. This method will override your settings in the Receipts settings under Administration.

Send An Email Or Print A Receipt

To email or print a receipt after you have processed a transaction with any of Qualpay's products - [Virtual Terminal](#), [Payment Gateway](#), [Invoicing](#), or [Recurring Billing](#):

1. Select **Transactions** from the main menu.
2. Click on the transaction that you want to send the receipt.
3. Scroll down to the **Actions** section.
4. Click **View Receipt**. The receipt provides the option to either email or print.
5. Select **Email** and enter the email address. Then click **Add Email**. You can add more than one email address in this section by repeating this step. Click **Send Receipt**.
6. Select **Print** to view your print window.

How To View A Receipt

To view a transaction receipt for any of Qualpay's products - [Virtual Terminal](#), [Payment Gateway](#), [Invoicing](#), or [Recurring Billing](#):

1. Select **Transactions** from the main menu.
 2. Click on the transaction that you want to view a receipt.
 3. Scroll down to the **Actions** section on the right.
 4. Click **View Receipt**. The receipt provides the option to either email or print.
-