Create An Invoice

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Go to **Invoices** and then select ***New Invoice***, located in the upper left-hand side of the Invoice page.

You can create an invoice and save it to send later or send the invoice during creation. You can send invoices to a new customer or an existing customer stored in Customer Vault.

To complete the invoice creation process:

1. Verify the business address on the invoice preview. You can edit the business address and contact information on the invoice by scrolling to the **Default Overrides** section of the page. Click on the ***Header*** line to expand it, and click the *edit* button next to the business address.

> *Note: To change the default contact information for future invoices, update Invoice Settings. Updating the Business Address on an invoice or in Invoice Settings does not update the address that Qualpay has on file for your account.*

2. If you have more than one Payment Profile on your account, select one for your invoice from the drop-down. This will apply the Payment Profile settings (AVS, CVV, Transaction Fee, etc.) to the invoice.

> *Note: If your merchant account is set up for, and you select a Payment Profile configured with Transaction Fees, they will automatically be applied to the invoice. You may edit the fee to be lower than the default configured on your Payment Profile, or you may turn it off for specific Invoices. Go to the **Default Overrides** section of the page. Click on the **Payment Page** section to expand it.*

3. Assign the invoice to a customer in the *Billing* field. Click the ***Add Billing Contact*** icon. Start entering the name of an existing customer or select ***Create A New Customer*** from the drop-down.

4. Select an existing customer by clicking on the customer name in the list and then click ***Update***. To create a new customer, enter a *Customer ID*, *First and Last Name* or *Business Name*, and *Email Address*. Then click ***Update***. The customer's information will appear on the invoice preview.

5. Enter an *Invoice ID*, an identifier up to 25 characters in length, that you will use to track the invoice.

6. The *Invoice Date* is set to today by default. You can change the date by selecting the calendar icon.

7. Add line item details for the invoice by clicking the ***Add An Item*** icon. In the **Add Invoice Line Item** modal, select from the list of Saved Line Items or enter the *Description, Quantity,* and *Price* for each item. Then click ***Add*** to add the line item to the invoice. The total for each line item will be calculated. To add additional line items, click the ***Add An Item*** icon again. Each line item will appear in the preview as you add them to the invoice.

> ***Note***: *You may add a line item with a price of 0 if you have at least one other line item with a price greater*

than 0.

8. Optional: In the **Default Overrides** section of the page, add a tax rate to the invoice. Click on the ***Body*** section to expand it. Enter the tax rate in the box, and it will appear on the preview under the subtotal line.

Note: To change the default tax rate for all future invoices, update Invoice Settings. To add a Transaction Fee, you must remove your tax rate or set it to zero.

9. By default, payment is due upon receipt of the invoice. Change the payment due option by going to the **Default Overrides** section of the page. Click on the ***Footer*** section to expand it. If you click ***# of Days*** for *Payment Due*, you must enter the number of days from the invoice date on which the payment is due. If you click ***On Date*** for *Payment Due*, you must enter the exact date on which the payment is due. When you change the *Payment Due*, the invoice due date in the preview will also change.

Note: To change the default Payment Due, update Invoice Settings.

10. Optional: You may also add additional *Payment Terms* and *Footer Notes* in the **Footer** section. When entering information into these fields, it will display in the preview.

Note: To change the default Payment Terms and Footer Notes, update Invoice Settings.

11. Optional: Partial payments on invoices are not enabled by default. To allow partial payments, go to the **Default Overrides** section of the page. Click on the ***Payment Page*** section to expand it. Click the ***Allow Partial Payments?*** toggle to set it to *Yes*.

Note: To change the default Partial Payments settings, update Invoice Settings.

12. Optional: ACH payments are not enabled by default. To allow ACH payments, go to the **Default Overrides** section of the page. Click on the ***Payment Page*** section to expand it. Click the checkbox for **ACH** next to *Additional Payment Types*. You may elect to accept only ACH payments for the invoice by clicking the ***ACH Only*** toggle to set it to *Yes*.

Note: To change the default ACH settings, update Invoice Settings. ACH payments are only allowed for merchants approved to take ACH through Qualpay.

13. Optional: By default, receipts are not automatically sent to customers when they pay via invoice. To enable receipts, scroll to the **Default Overrides** section and click the ***Notifications*** section to expand it. Click the ***Automatically send a receipt after payment?*** toggle to set it to *Yes*.

> *Note: To change the default invoice receipt settings, update the Receipt Configuration.*

14. To save the invoice without sending it to the customer, click the ***Create*** button on the upper right corner of the invoice page. The invoice will reload with a status of *Saved*.

To immediately save and send the invoice to the customer, click the ***Send*** button. Click ***Yes*** to save the invoice. Review the customer's email address in the pop-up window and click ***Send Invoice***. The invoice summary page will load, and the new invoice will have a status of *Outstanding*.

> *Note: You cannot edit an invoice after it has been sent.*