Create An Invoice

Last Modified on 06/20/2023 1:26 pm PDT

Go to **Invoices** and then select ***New Invoice***, located on 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. The address is always the business address on file with Qualpay. You can edit the business address and contact information on the invoice. Scroll 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, you must change it in the invoice settings. Updating the business address for an invoice does not update the address Qualpay has on file for your account.*

2. Assign the invoice to a customer by scrolling back up to 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.

3. Upon locating an existing customer, click on the customer name and then click ***Update***. Suppose you previously selected the option to create a new customer. In that case, you must enter a *Customer ID*, *First Name* and *Last Name* or *Business Name*, and *Email Address*. Then click ***Update***. The customer's information will appear on the invoice preview.

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

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

6. Add the line item details for the invoice by clicking the ***Add An Item*** icon. In the **Add Invoice Line Item** pop-up window, enter the *Description, Quantity,* and *Price* (per item). The total for the line item will be calculated. Click ***Add*** to add the line item to the invoice. 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 where the price is 0 as long as you have at least one other line item where the price is greater than 0.*

7. Optional: To add a tax rate to the invoice, scroll to the **Default Overrides** section of the page. 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, you must change it in the Invoice Settings.

8. 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 that the payment is due. As you change the *Payment Due*, the invoice due date on the preview will also change.

Note: To change the default Payment Due, you must change it in the Invoice Settings.

9. Optional: You may also add additional *Payment Terms* and *Footer Notes* in the **Footer** section. Entering information into these fields will display on the preview.

Note: To change the default Payment Terms and Footer Notes for all future invoices, you must change them in the Invoice Settings.

10. Optional: By default, partial payments on invoices are not enabled. To allow partial payments on the invoice, scroll to the **Default Overrides** section and then click on the ***Payment Page*** section to expand it. Click the ***Allow Partial Payments?*** toggle to set it to *Yes*.

Note: To change the Partial Payments default setting for all future invoices, you must change it in the Invoice Settings.

11. Optional: ACH payments on invoices are not enabled by default. Suppose you would like to allow ACH payment for the invoice. In that case, you can enable it by clicking the checkbox for ACH next to *Additional Payment Types* in the ***Payment Page*** section.

Note: To change the ACH default setting for all future invoices, you must change it in the Invoice Settings. ACH payments are only allowed for merchants approved to take ACH through Qualpay.

12. Optional: By default, receipts are not automatically sent to customers when they make a payment 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 setting so that a receipt is always sent to customers when they make a payment via invoice, you must change it in the Receipt Configuration.

13. To save the invoice without sending it to the customer, click the ***Create*** button on the upper right corner of the invoice page. The new invoice will reload with a status of *Saved*. To immediately save and send the invoice to the customer, click the ***Send*** button. Accept changes made and then review the customer's email address in the pop-up window. Then click ***Send Invoice***. The invoice summary page will load, and the new invoice will have a status of *Outstanding*.

You will not be able to edit any fields on the invoice after you have sent it, but you can resend it.