Invoice Settings

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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.

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. You can change the address and contact information displayed on your invoices.

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 we have on file for your account. Please contact us if you want to change the official business address.*

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 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 *Payment Page* section.

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

1. Click on 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 *Payment 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 and off, you must change them in the receipt configuration.*