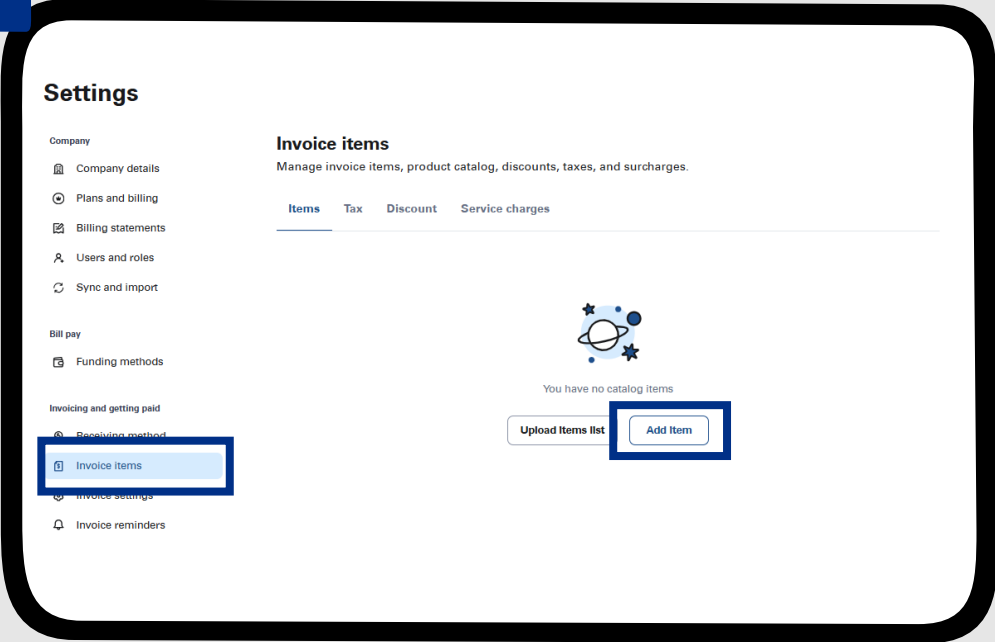


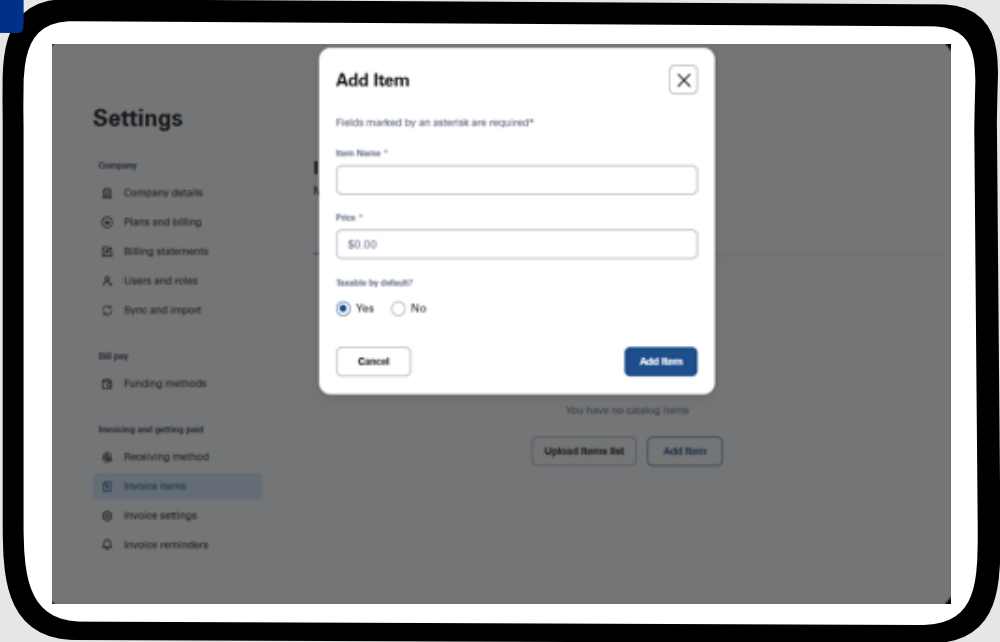
Invoicing: Add Items From Settings

1



In "Settings", navigate to the "Invoice items" tab. Under the "Items" section, choose "Add item".

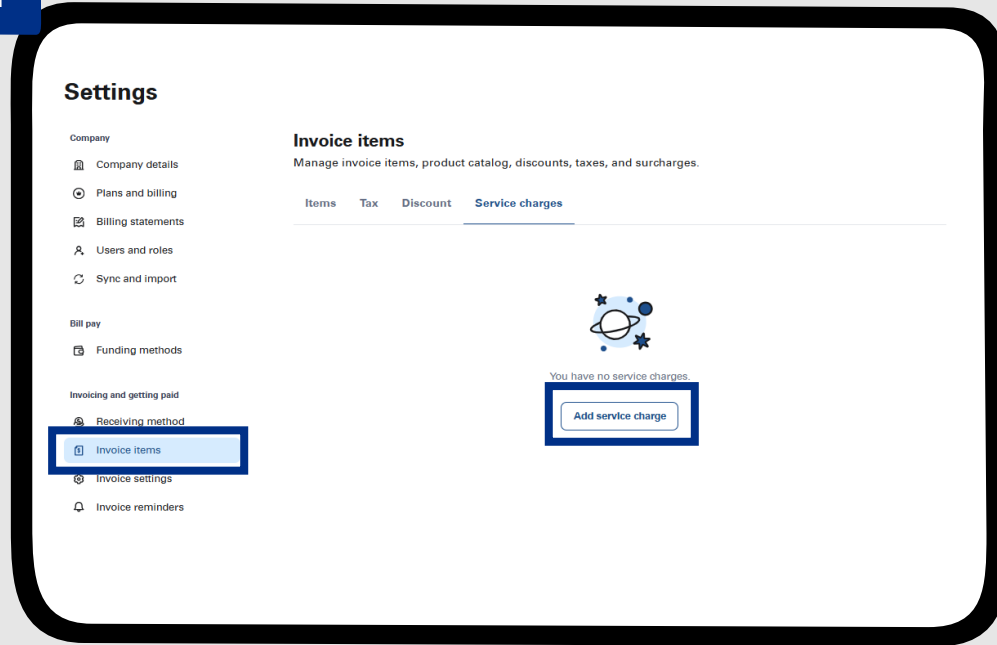
2



Fill in the "Item Name", "Price", and choose if the item is "Taxable by default." Click "Add Item".

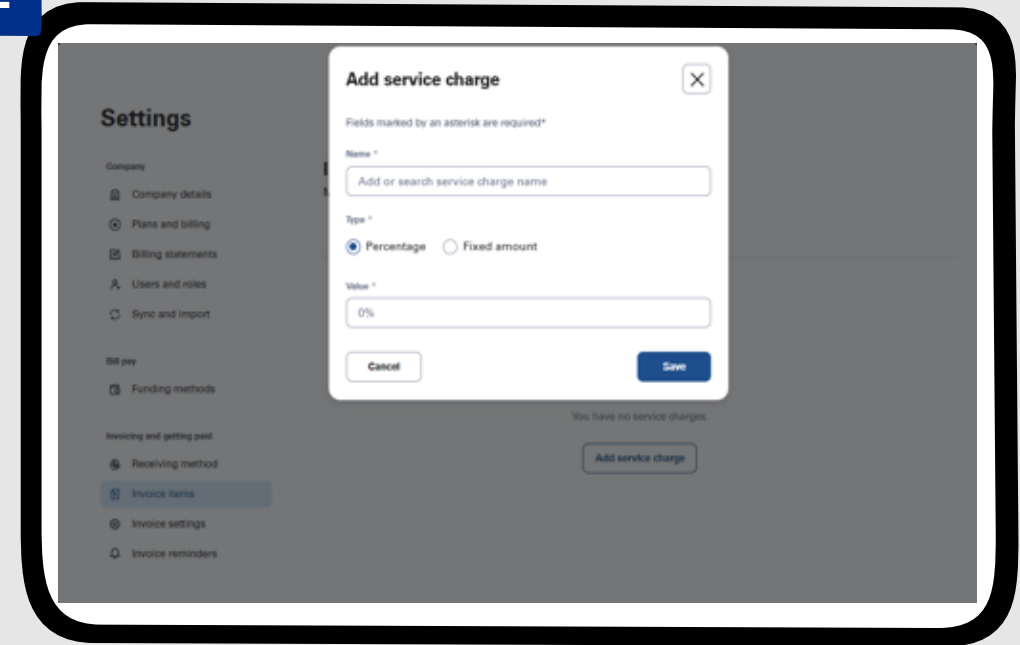
Invoicing: Add Service Charges From Settings

1



In "Settings", navigate to the "Invoice items" tab. Under the "Service charges" section, choose "Add service charge".

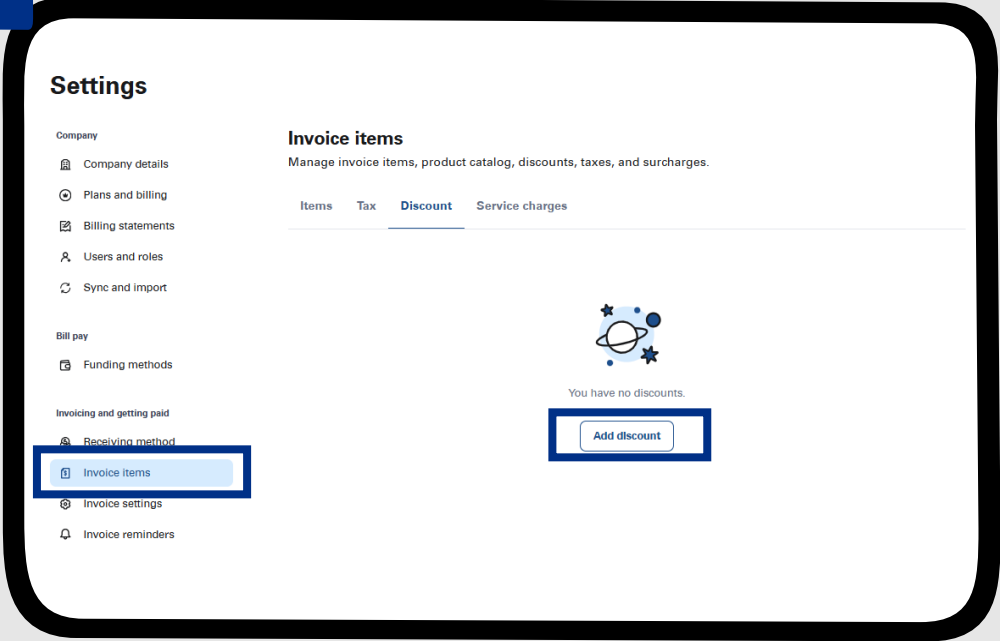
2



Fill in the "Name" and choose the "Type" of service charge. Fill in the "Value". Click "Save".

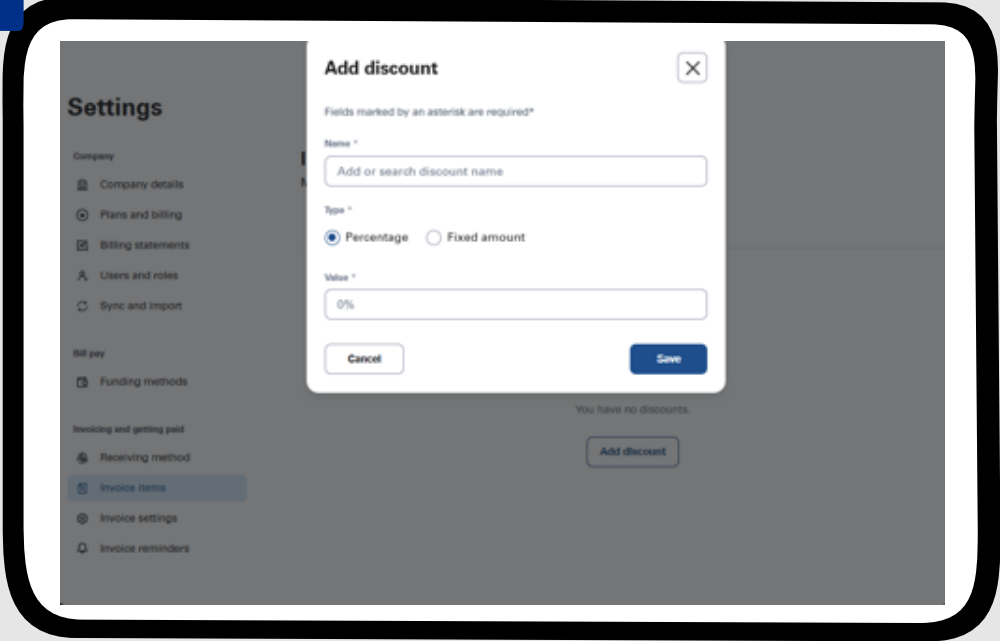
Invoicing: Add Discounts From Settings

1



In "Settings", navigate to the "Invoice items" tab. Under the "Discount" section, choose "Add discount".

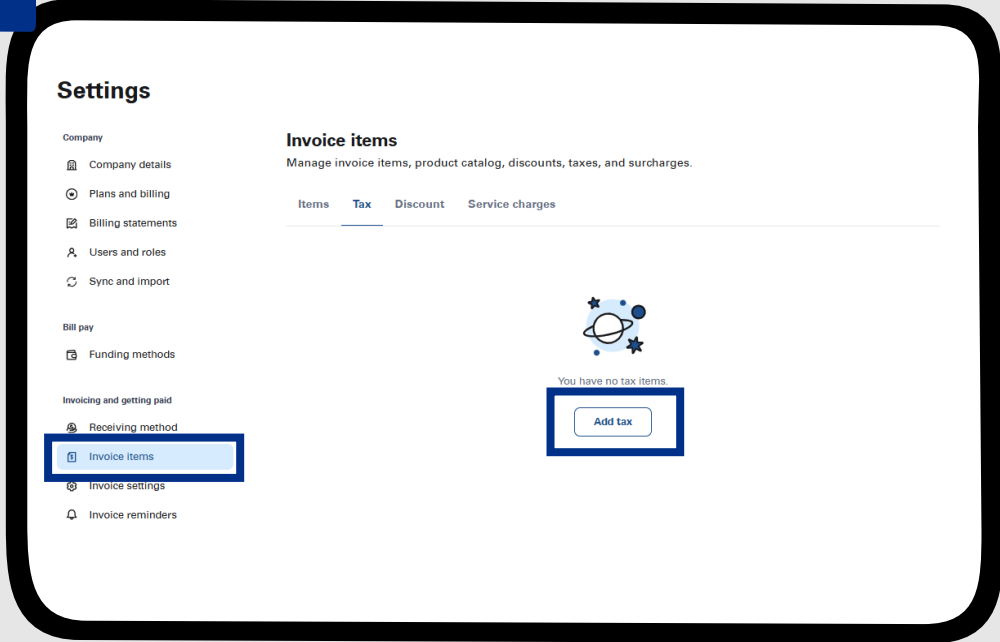
2



Fill in the "Name" and choose the "Type" of discount. Fill in the "Value". Click "Save".

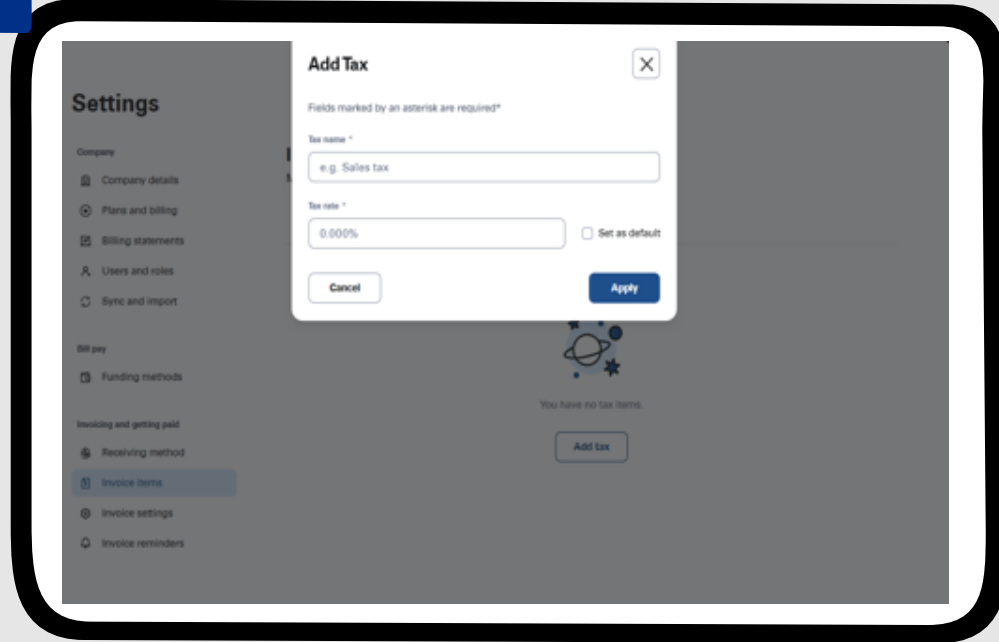
Invoicing: Add Taxes From Settings

1



In "Settings", navigate to the "Invoice items" tab. Under the "Tax" section, choose "Add tax".

2



Fill in the "Tax name" and "Tax rate". Click "Apply".

Invoicing: Choose Payment Options From Settings

1

Settings

Company

- Company details
- Plans and billing
- Billing statements
- Users and roles
- Sync and import

Bill pay

- Funding methods

Invoicing and getting paid

- Receiving method
- Invoice settings**
- Invoice reminders

Invoice settings

Configure the settings for new invoices. These settings can be overridden on individual invoices.

Invoice formatting

Customize your invoice numbers with a prefix and an auto-incrementing numerical suffix. Each invoice number will be unique and sequential.

Invoice # format
INV-000003

Edit invoice format

Invoice note

Add a default invoice note to display on all invoices.

+ Add default note on invoice

Payment options

Select which payment methods to offer your clients when paying an invoice.

Transaction receiving limit

Your transaction receiving limit is the maximum amount of money you can receive per transaction. This limit helps prevent fraud, manage risk, and ensures compliance with anti-money laundering (AML) regulations.

Bank ACH limit: \$5,314.00 | Credit or debit card limit: \$3,426.00

ACH Bank transfer On

Credit or debit card On

+ Add custom payment details

In "Settings", navigate to the "Invoice settings" tab. See the "Payment options" section. Toggle "ACH Bank transfer" or "Credit or debit card" to on and choose "+ Add custom payment details" if applicable.

2

Custom payment details

The custom payment option will appear on any new invoice you create. You can always change it later, or edit manually for each invoice.

Fields marked by an asterisk are required*

Custom payment details *

Enter additional bank details for wire transfers, address details for check delivery or any other custom information.

This information will be added to the invoice PDF footer. \$/000

Cancel Save

Invoice note

Add a default invoice note to display on all invoices.

+ Add default note on invoice

Payment options

Select which payment methods to offer your clients when paying an invoice.

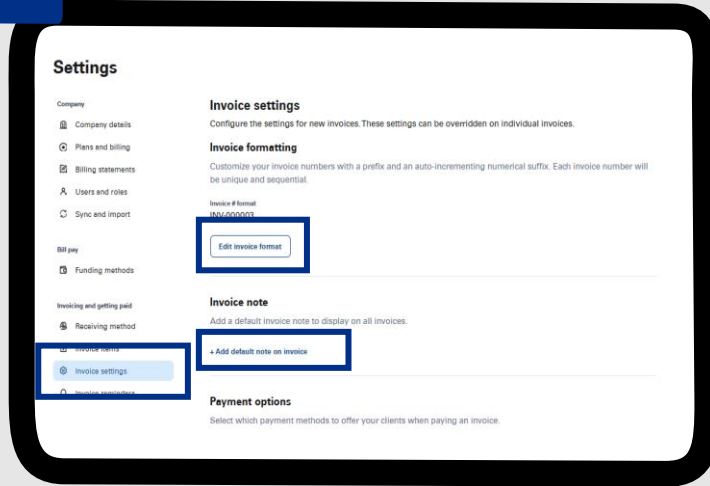
Transaction receiving limit

Your transaction receiving limit is the maximum amount of money you can receive per transaction. This limit helps prevent fraud, manage risk, and ensures compliance with anti-money laundering (AML) regulations.

If adding a custom payment, type the payment details in the text box and hit "Save".

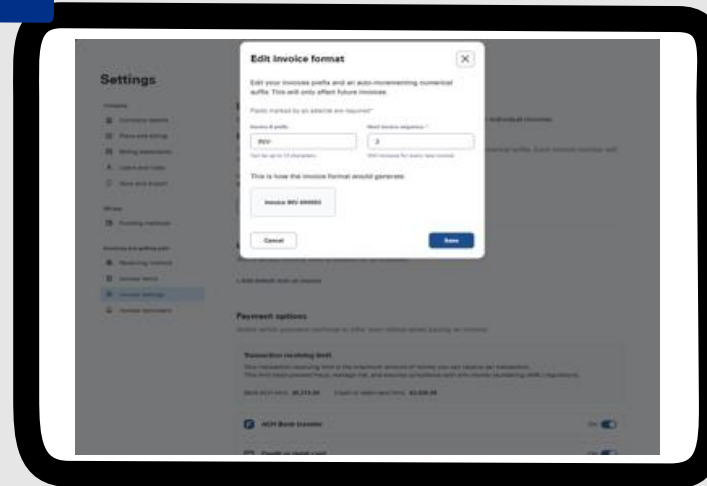
Invoicing: Formatting From Settings

1



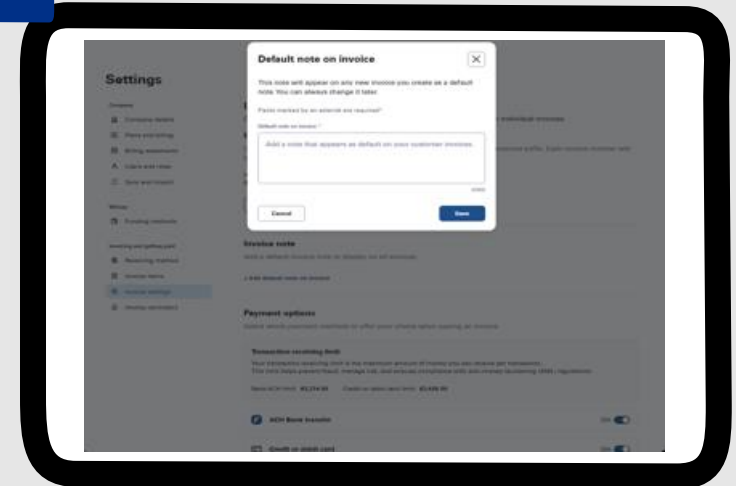
In "Settings", navigate to the "Invoice settings" tab. Choose "[Edit invoice format](#)" and/or "[+ Add default note on invoice](#)".

2



In "Edit invoice format", fill in the "Invoice # prefix" and "Next Invoice sequence". See option to view the invoice format. Click "[Save](#)".

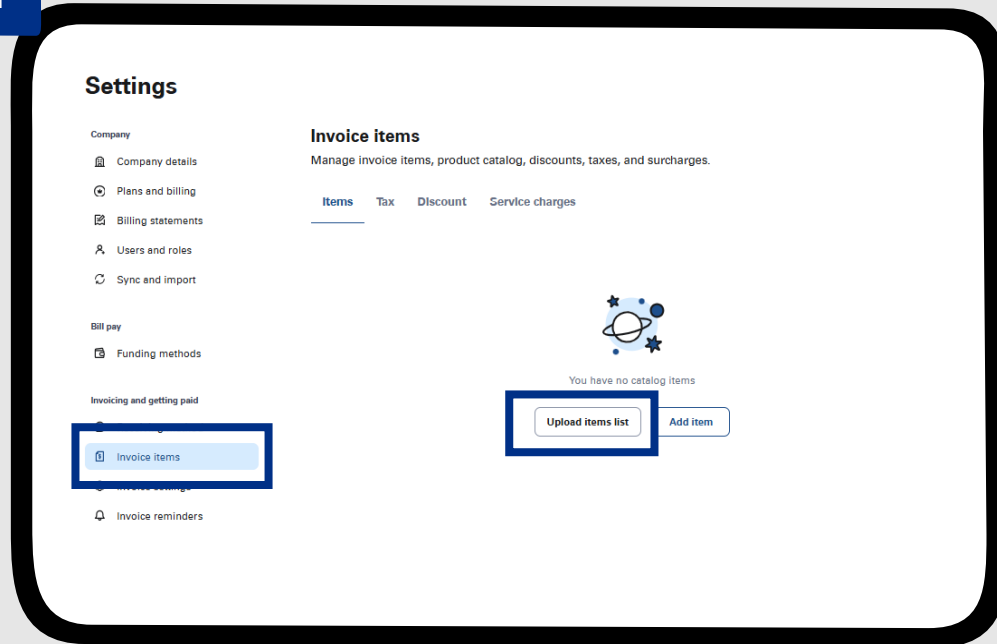
3



In "Default note on invoice", fill in the text box to add a note that appears as default on customer invoices. Click "[Save](#)".

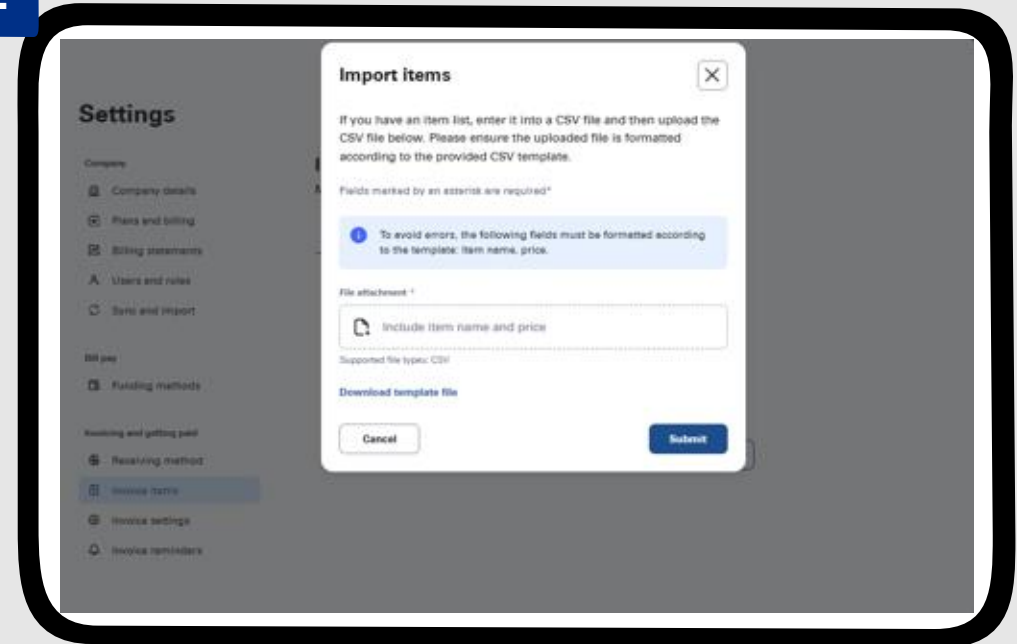
Invoicing: Upload Product Catalog From Settings

1



In "Settings", navigate to the "Invoice items" tab. Under the Items section, choose "Upload items list".

2



Attach your Product Catalog CSV file. View the "Download template file" for assistance on CSV formatting. Click "Submit".