

How To Invoice Customers with PaySimple Solution 2.0

With this feature you can send email invoices containing a payment button that routes your customer to a secure online payment form. Once a payment is made using this button, the system tracks the payment, marks the invoice “Paid,” and attaches the payment transaction ID to the invoice.

You must have an email address and username saved for any customers you invoice. Otherwise, the system will generate an error causing you to lose all the information saved on the invoice. It's a good idea to edit your display setting (**Manage System**→**Display Settings**) so that Username and Email are always displayed in the abbreviated customer view (shown at the top of the **Process Payments** screen when a customer is loaded).

To generate an Invoice:

Please note this function only works with Internet Explorer.

1. Create a payment form. (See **How to Create a Payment Form**)
2. Create a Web Form Button and attach to the Payment Form. (See **How to Create a Payment Button**)
3. Review the default Invoice Email in the system (edit it if needed). You can create multiple invoices in the “Invoice” category, then select one each time you send an invoice to a customer, or create an Invoice Schedule
4. Add a new customer or select an existing customer account. Make sure an email address and username have been defined
5. From the **Transaction** type list, select **Invoicing**
6. Select **One Time Invoice** or **Invoice Schedule**
7. Define the following information:

For One-Time Invoices

- Invoice Amount
- Invoice Number
- Due Date
- Select Invoice Template
- Select the Payment Button

Click **Send** for a one-time invoice and the system will immediately email the invoice to your Customer.

For Invoice Schedule:

- Invoice Amount
- Invoice Number
- Select Invoice Template
- Select the Payment Button
- Schedule Name
- Start date
- End Date (or check **No End Date** box for open-ended schedules)
- Frequency
- Grace Period – the number of days after the invoice is sent that payment is due. The system will use this to automatically populate a Due Date on the invoice. For example, if you send an invoice on June 1, with a grace period of 10 days, the invoice will show a Due Date of June 10

Click **Save** for a recurring Invoice schedule. If the schedule is programmed to start “today,” the system will immediately send the invoice email. If it is programmed to start in the future, the email will be generated according to the Frequency you selected.

8. You can click **Invoice History** to see a list of all invoices sent to the active customer. The list will include one time invoices, and invoices generated as part of invoice schedules. This page will show which invoices have been paid and which are outstanding. Click **Re-Send** to email any unpaid invoices to your customer again.

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