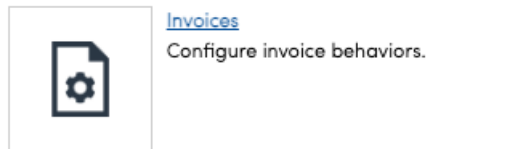# Invoice Settings

11/01/2024 10:12 am CDT

Overview

Most of the settings discussed on this page can be found in **Control Panel > Invoices**. These settings control how the Invoice is presented, payment requirements, and more.

Invoices
Configure invoice behaviors.

Settings and Navigation

You can also find User settings related to invoicing in **Control Panel > Users > Edit** and select **Permissions**.

There may be some settings related between Services and Invoicing. You can go to **Control Panel > Services > Edit** and explore the options related to a particular Service Invoicing Mode.

Approved/Unapproved Invoices

There are 3 ways to change if the invoice needs approval before being sent to the customer for payment.

All Invoices By Default

If you want all Invoices generated by appointments to be marked as "Unapproved" then you can go to **Control Panel > Invoices**. Locate **Appt Invoice Mode** and select either Approved or Unapproved.
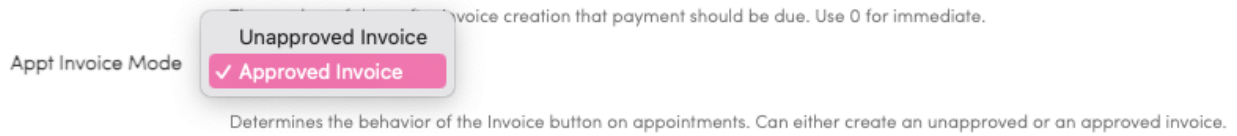
By Specific Service

If you would like all invoices of a particular Service to be generated from appointments as "unapproved", go to **Control Panel > Services > Edit** the service. Scroll to the Invoicing section and check the **Mark Invoices Unapproved** box.

By Specific User

If you want invoices to require approval for a specific user, go to **Control Panel > Users > Edit > Permissions** tab. You want to edit the user who needs to have their work approved by someone else. You may have to do this for everyone generating invoices or just certain individuals you want to check.

Using **Send Invoice Approvals To,** select the name of whomever is approving the invoices.

Appointment Inventory Mode

If the mode is **Normal** then the technicians add parts/items to the appointments as needed/as they finish. They will default to whatever the part's "internal" setting is.

If the mode is **Internal** then they will have an "inventory" action available on the appointment and they can record any parts/items they use on the appointment there -- those will automatically be 0 and also marked as internal, regardless of what the part is set to.
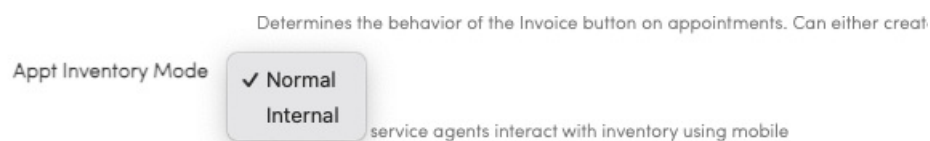
Cease Invoice Reminders

To stop reminders for any particular Invoice, you can head to the Invoice's Details page and look in the upper right corner of the Invoice body. If there is an upcoming reminder, it will appear with an X to remove it. Removing a reminder like this will indefinitely prevent further reminders from sending for that Invoice until you choose to send the Invoice again.
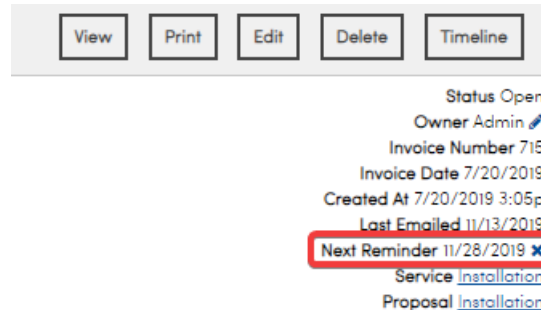
Send $0 Dollar Invoices

Some businesses choose to create invoices for $0. If you want these to send to customers, check this box. Otherwise, those will not automatically send invoices or receipts if you have Invoice specific **Notifications** turned on.

Please review Invoice Notifications.

Payments

These settings control events around auto pay. If you want to know more about these settings, please review Automatic Payments

Total Payment Limit

On the invoice details page, click Settings at the top of the page. Here, you can adjust the **Total Payment Limit**, which controls how much you are collecting from the customer at a time. Please note that this value reflects the **total** you want the customer to be able to pay, including past payments. If a customer has already paid $100 and you want to collect another $100 payment from them, you want to set this amount to $200.

Terms

Invoice terms are separate from Terms and Conditions for proposals. This section only shows on Invoices.

Terms can be set for an Organization, a Contact or a unique Invoice. Click here for details on setting Invoice terms.

If you want to learn more about finance charges, please review Finance and Surcharging.

FAQs

If I go in and complete a proposal, will it create an invoice?

If you are wanting to close the appointment and not generate a new invoice, these are the settings you'll want for the service:

Go to **Control Panel > Services > Edit** Service. Scroll down to Invoicing section. As long as those two settings are changed to Close Appointment and Manual, it should not generate another invoice automatically.

How can we show service date on the invoice?

Go to Control Panel > Scheduling and check the following box/boxes. The second images is what the invoice will show.

This is what I'd like to have: 1- Agents finish job and send invoice for approval to me. 2- I approve invoice and charge customer. 3- I decide if I send or not invoice and receipt to customer (not all of them want to receive it). Could you please guide me into what is the correct setting for what I'm looking for?

First, go to **Control Panel > Invoices**. Make sure the **Appt Invoice Mode** is set to "**Unapproved Invoice**" and click **Save**:

Invoice Settings

	Invoices
Tax Rates	Manage tax rates
Default Tax Rate	--Select one-- ▼
Invoice Number Template	{id}
	This field is used to customize invoice numbers. Place {id} where the invoice number should go. (ex: "Inv-{id}")
Invoice Number	6654
Invoice Due Days	10
	The number of days after invoice creation that payment should be due. Use 0 for immediate.
Appt Invoice Mode	Unapproved Invoice ▼ ←
	Determines the behavior of the Invoice button on appointments. Can either create an unapproved or an approved invoice.

Then, go to **Control Panel > User**, and click **Edit** next to the name of the agent you'd like to change the invoice permissions for. Then click on the **Permissions** tab. In the drop down menu next to **Send Invoice Approvals** to, select your name:

Settings	**Permissions**	Notifications

Standard Permissions

Pricing	☑ Can See Pricing
Reschedule Appointments	☐ Reschedule appointments in mobile
Transfer Appointments	☐ Transfer appointments in mobile
Slot Searching	☐ Limit slot results to this user
Searching	All Contacts ▼
Include Member Orgs	☐ Search all member organizations
Proposals	Owned ▼
Send Invoice Approvals To	None ▼ ←
	Select a user to send invoices generated by this user for approval.

Then on that same page, scroll down to **Permission Overrides**, and make sure that the **Invoices:Approve** permission is set to **Deny**, and click **Save**:

Finally, go to **Control Panel > Notifications**, and click on the "T**urn Notifications on/off**" tab. Then scroll down to Invoices:

If you don't want the customer to get a notification about the invoice being created then uncheck "**Invoice**" in the first column; if you don't want them to get a receipt after they paid the invoice then you should also uncheck "**Invoice Receipt**". Click **Save**.

Troubleshooting

The Send button on the invoice is not sending to the Customer.

Make sure that your notifications for invoices are enabled. In **Control Panel > Notifications**, the first page and the top checkbox - this is the official "Go Live" box to check when you're ready to start invoicing customers.