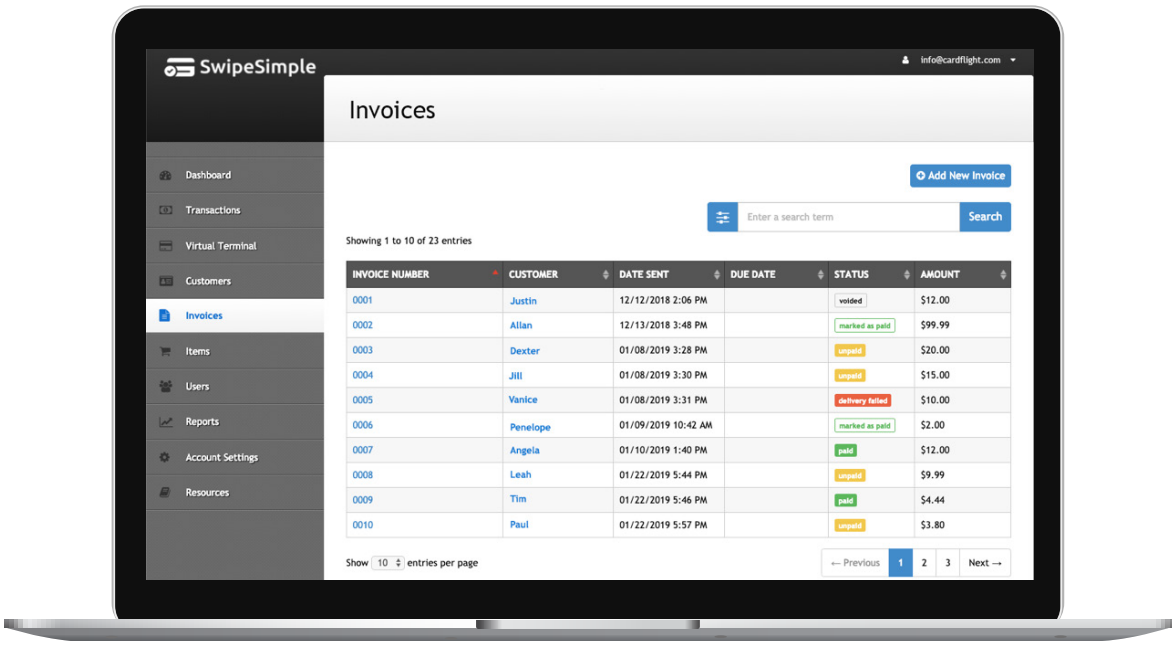
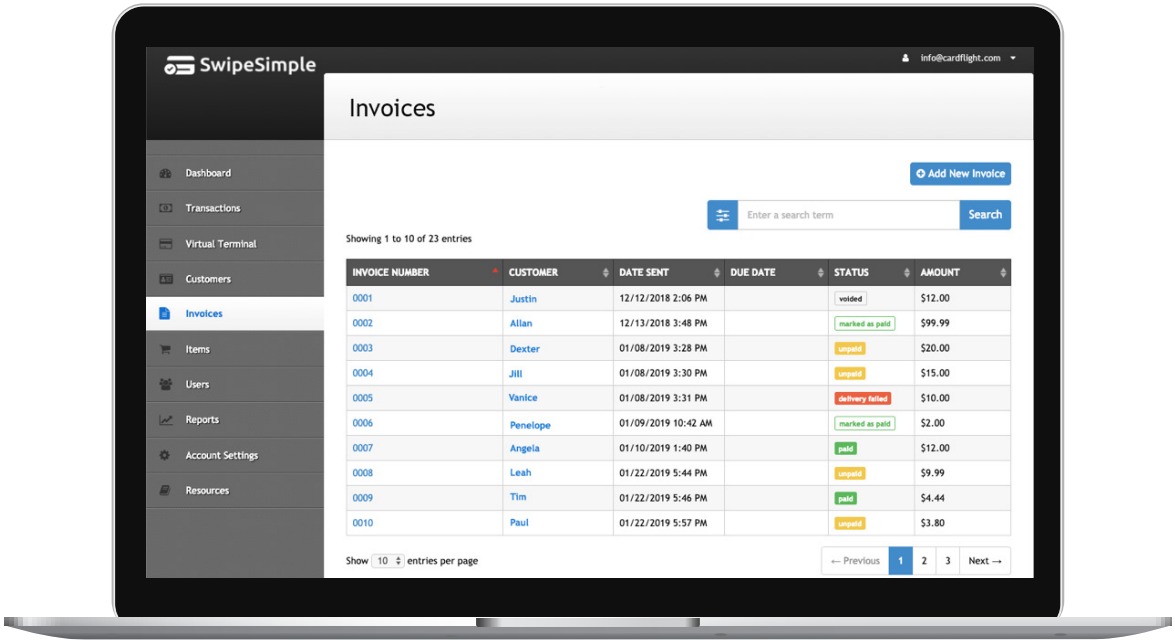
SwipeSimple

Invoices Release Briefing and How To Guide





With invoices from SwipeSimple you can easily create, send, view and manage invoices from your Merchant Web Dashboard.

Create and send invoices:

- Directly add items from your item catalog to an invoice
- Set the invoice due date
- Collect tax on the invoice
- Customize invoices with your company logo, footer text, and customer-specific notes
- Send invoices via email
- Once the invoice is received, customers can easily pay from their computer or mobile device

Manage and view invoices:

- View past invoices
- View the status of all invoices – paid and unpaid
- Manually mark an invoice as paid, if paid by the customer via cash or check
- Send reminders for overdue invoices
- Search and filter invoices for easy viewing

Getting started

How to create an invoice

From your Merchant Web Dashboard, navigate to the **Invoice** tab.

Click the **Add New Invoice** button.

Select the **Customer Name** field and either search within your existing list of saved customer names or create a new customer.

For an existing customer with an email on file, that email will populate automatically. If entering in a new customer's name, add that customer's email. Any new customer name and email will be saved to the Customers records.

In creating an invoice, there are required and optional fields:

Required Fields	*Optional Fields*
Customer Name	Tax
Customer Email	Due Date
I**nvoice Number** - invoice number will automatically be added in numerical order. Merchants can change the Invoice Number, but one must be provided.	Note
Description - there must be at least one item description on the invoice.	
Unit Price	

Review information in the invoice to ensure it is correct. *Note: You will not be able to edit the invoice after sending.*

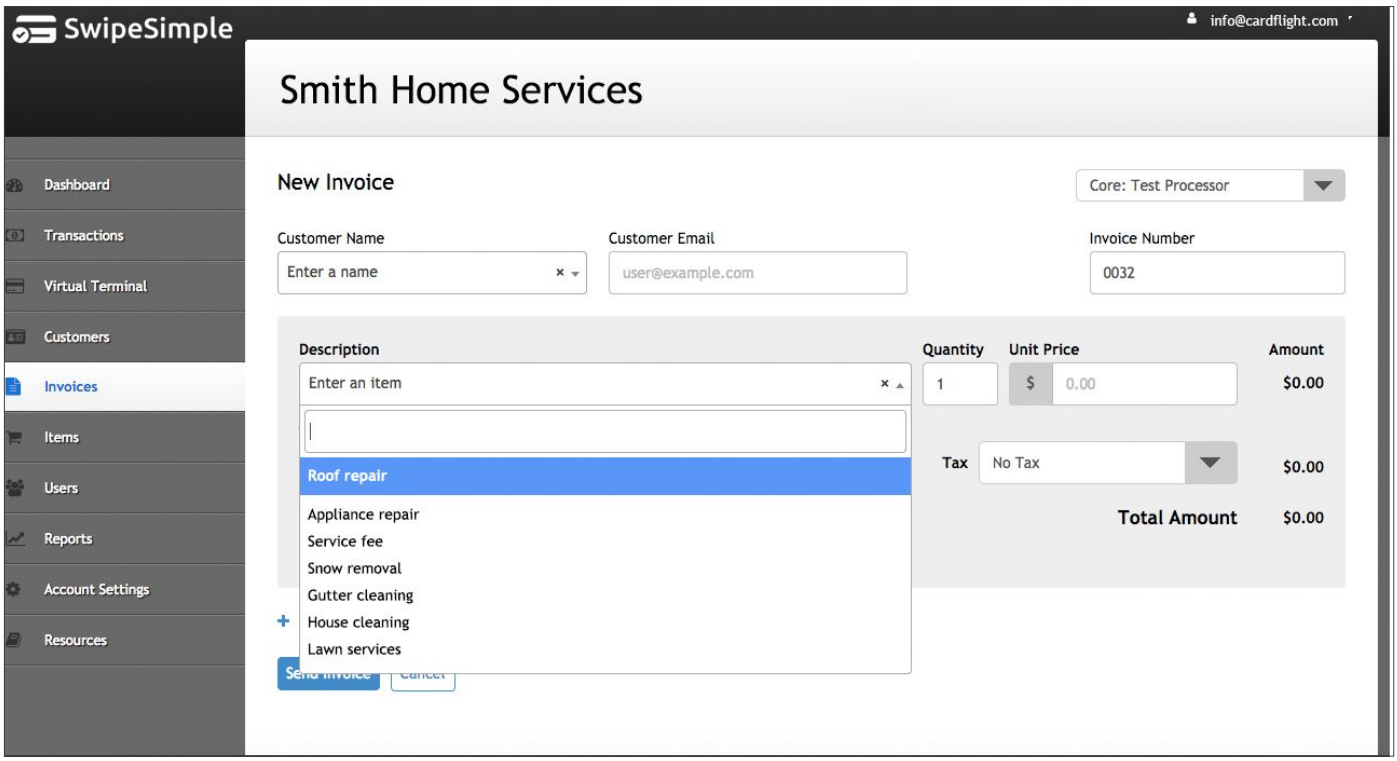
Once the invoice details have been entered correctly, click **Send Invoice**.

Adding items to your invoice

In the **description field**, you can enter an item from your existing catalog or create a new item.

Note: adding new items will not create a new item in your current item catalog automatically.

To enter an item from your existing catalog, either begin typing the name of that item in the search bar or use the drop down arrow to search



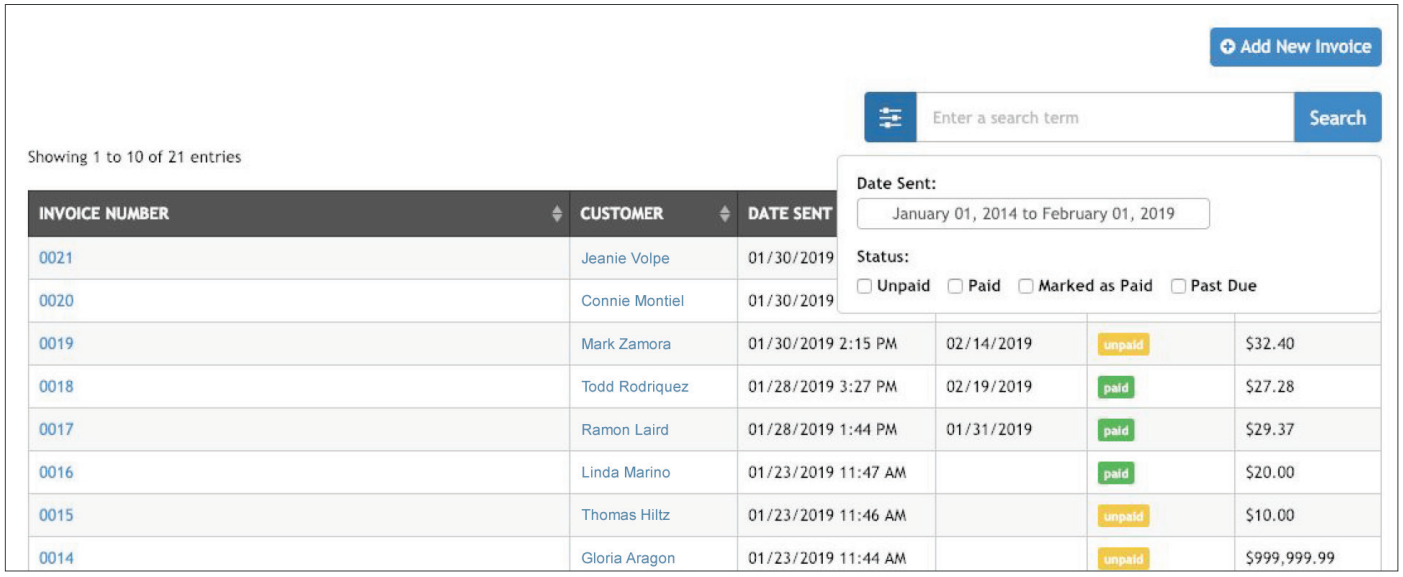
Search and filter invoices

From the main **Invoice** tab on your Merchant Web Dashboard, you can search by invoice number or customer name in the **main search bar**, or use the **filter drop down** on the left to search by date sent or status

To filter on date range, click on the **filter** button, then click on the **date field** and choose an appropriate date range from the calendar picker.

To filter on date range, click on the **filter button**, then click on the **date field** and choose an appropriate date range from the calendar picker.

To filter by status, check the box next to the relevant filter(s). *Note: Past Due invoices are technically also Unpaid invoices and will show up when filtering on Unpaid.*

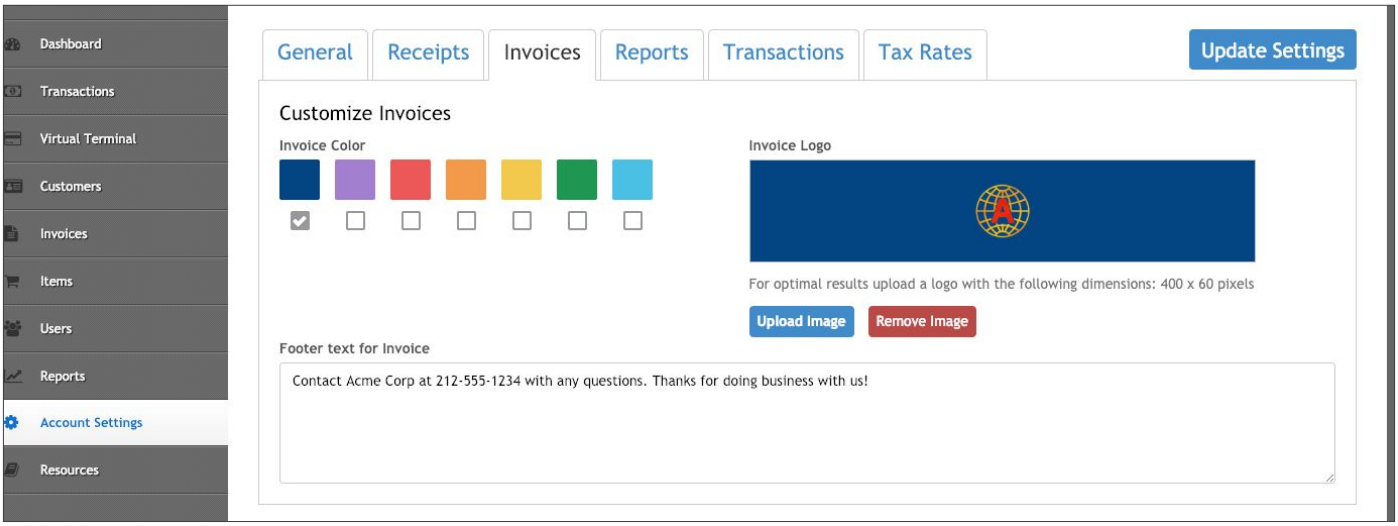


Customizing your invoice

You can customize the look of your invoices under **Account Settings** on your Merchant Web Dashboard.

In **Account Settings**, select the **Invoices** tab to customize the color, add a logo or customize the footer text. These changes will immediately update all invoices past and future when updating settings.

To upload an image, click the **Upload Image** button, and select an image file. The maximum file size is 500kb. For dimensions, 400x60 pixels is optimal, but if the file is larger than this, it will be resized automatically to make it fit. To complete the process, click **Update Settings**.



How do invoice statuses work?

From the Invoices tab on your Merchant Web Dashboard, you'll see the Status column and corresponding values beneath.

Status	
Unpaid	an invoice has been sent to a customer, but payment has not yet been received electronically.
Mark as Paid	in circumstance where alternative payment has been received (cash, check, etc.), you can mark an invoice as paid using the "Mark as Paid" button on the upper right hand side of the corresponding invoice.
Paid	when invoices are paid through the credit card form on the invoice, the invoice status will automatically be changed to Paid.
Past Due	invoices that have exceed their due date will automatically be moved to a Past Due status.
Delivery Failed	in the rare circumstance when an invoice is unable to be delivered to a customers inbox, Delivery Failed status will appear. To resolve this error, go to the invoice details, click resend and enter a new email address.
Void	invoices that have been voided by the Merchant will move to a Void status.

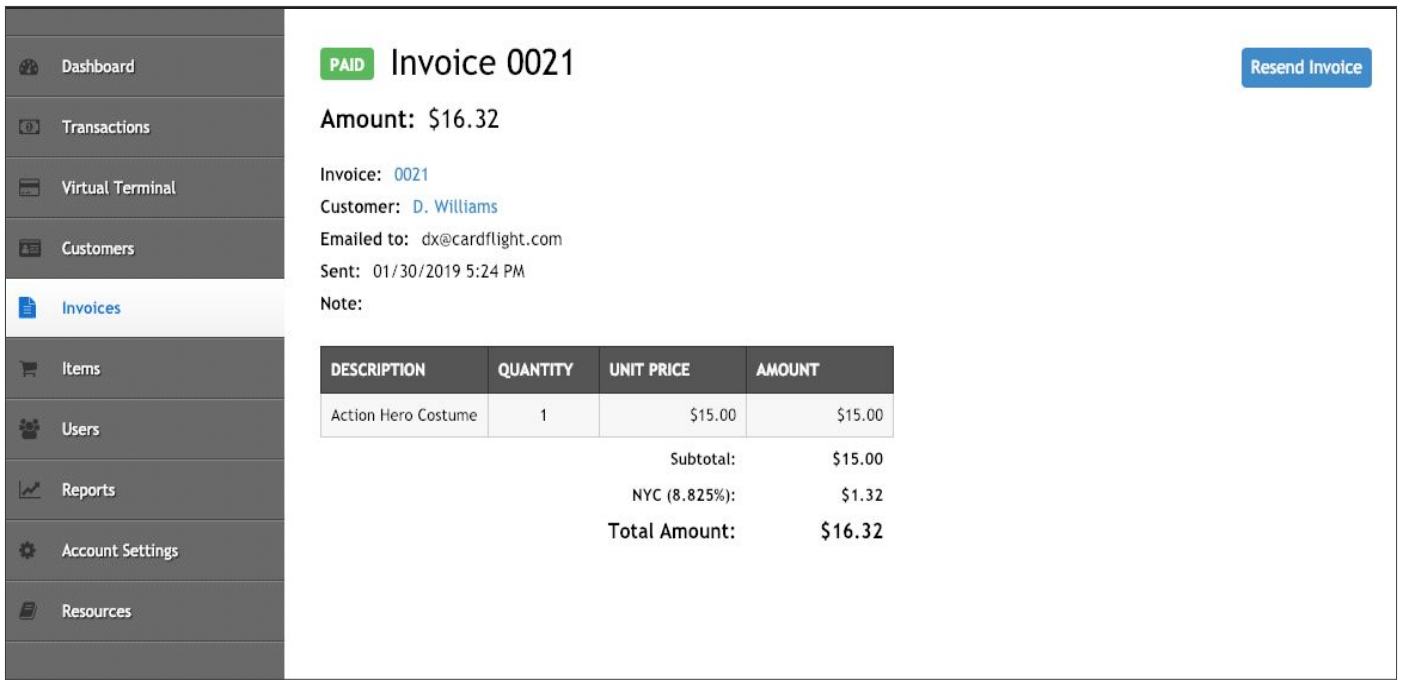
Re-sending an invoice

From the **Invoices** tab on your Merchant Web Dashboard, you can resend any invoice.

Click into the invoice you would like to resend and click the **Resend Invoice** button in the top right hand corner.

Next, enter the email address you would like to send the invoice to (the previously used email is auto-populated for convenience). Additionally, you can choose to send yourself a copy.

To complete the process, click the **Send Invoice** button.



Can I void an invoice?

From the **Invoices** tab on your Merchant Web Dashboard, you can void any invoice.

To void an invoice, go to the **invoice details page** and click the **Void Invoice** button in the upper right hand corner.

Voiding an invoice make it no longer payable by a cardholder and can not be undone.

Anticipated questions

Do I need to do anything to enable the Invoices feature?

Invoices will be automatically enabled for all Merchant accounts on March 5.

Will there be a confirmation that the invoice has successfully been delivered to my customers inbox?

In the event that an invoice is unable to be delivered, the invoice status will update to say "Undeliverable."

Where can I see the last time an invoice was sent to my customer?

You can check the last time an invoice was sent to your customer on the main Invoices tab in your Merchant Web Dashboard under 'Date Sent'.

Can my customers pay invoices from their mobile phone?

Yes, all invoices can be paid from almost any mobile browser.

Is there a section in the invoice to write a note?

Yes, when creating a new invoice you can add notes where you see + Add Note at the bottom left hand side of the page.

Can I edit an invoice after it's been sent to my customer?

No, an invoice cannot be edited once it has been sent. In the event an invoice is no longer accurate, the best course of action is to void that invoice and create a new one.

If I add an item to my invoice that is not currently in my catalog, will it auto create a new catalog item for me?

No, entering a new item in invoices will not create a new item in your catalog. To invoice on the same item multiple times, add the item to your catalog and it will become a drop down option for you when you create an invoice.

Can I customize the look of my invoice?

Yes, you can add your company logo, or any picture, and change the color of your invoice in the Account Settings on your Merchant Web Dashboard.

Do invoices show up in my transaction history?

Yes, paid invoices will show in your Transaction History and identified 'Invoices' in the transaction method.

How will I know my customer has paid their invoice?

An invoice paid directly from SwipeSimple will show a Status of "Paid" under the Invoices tab in your Merchant Web Dashboard. If your customer has paid for the invoice via check or cash - you can auto change the Status to "Marked as Paid".

Will I receive a notification that my customer has paid their invoice?

You will not be automatically alerted when an invoice has been paid. You can check the status of payment on the Merchant Web Dashboard under Invoices under 'Status'.

Will my customer get an email if their invoice is overdue?

No, your customer will not get an auto email once their invoice becomes overdue. You can resend the invoice by clicking into the invoice on your Merchant Web Dashboard and clicking "Resend Invoice" on the upper right hand side of the page.

Will my customer be able to see that they've paid the invoice?

Yes, once Paid the customer will see a 'Paid' stamp on their invoice.

If I'm invoicing a new customer, will their information be saved for future use?

If you are invoicing a customer for the first time SwipeSimple will save their information. If the customer is already on file, the invoice will tie to their existing profile.

Can I send my customer an invoice on my SwipeSimple App?

At this time, Invoices can only be sent via the Merchant Web Dashboard.

How can I discount the entire Invoice?

At this time, discounting the full Invoice amount is not a feature.

Can I offer an early - pay discount for a customers invoice?

Not at this time.

Does the email generated include a PDF of the invoice?

No, the customer will get a web page with the invoice and a payment link to pay that invoice. A PDF is not created

How does selecting items impact my inventory counts?

If you track inventory through SwipeSimple, the quantity sold of that item through your Invoice, will deduct from your item catalog.

What if my customer says they did not get the invoice?

If your customer has not received their invoice, check the status page on the Invoices tab of your Merchant Web Dashboard to confirm successful delivery.

Where can I find the secure payment link?

The payment link can be found on the invoice details page by clicking on the hyperlink of the Invoice Number.

SwipeSimple Basic Mobile App User Guide - Version 2018.1