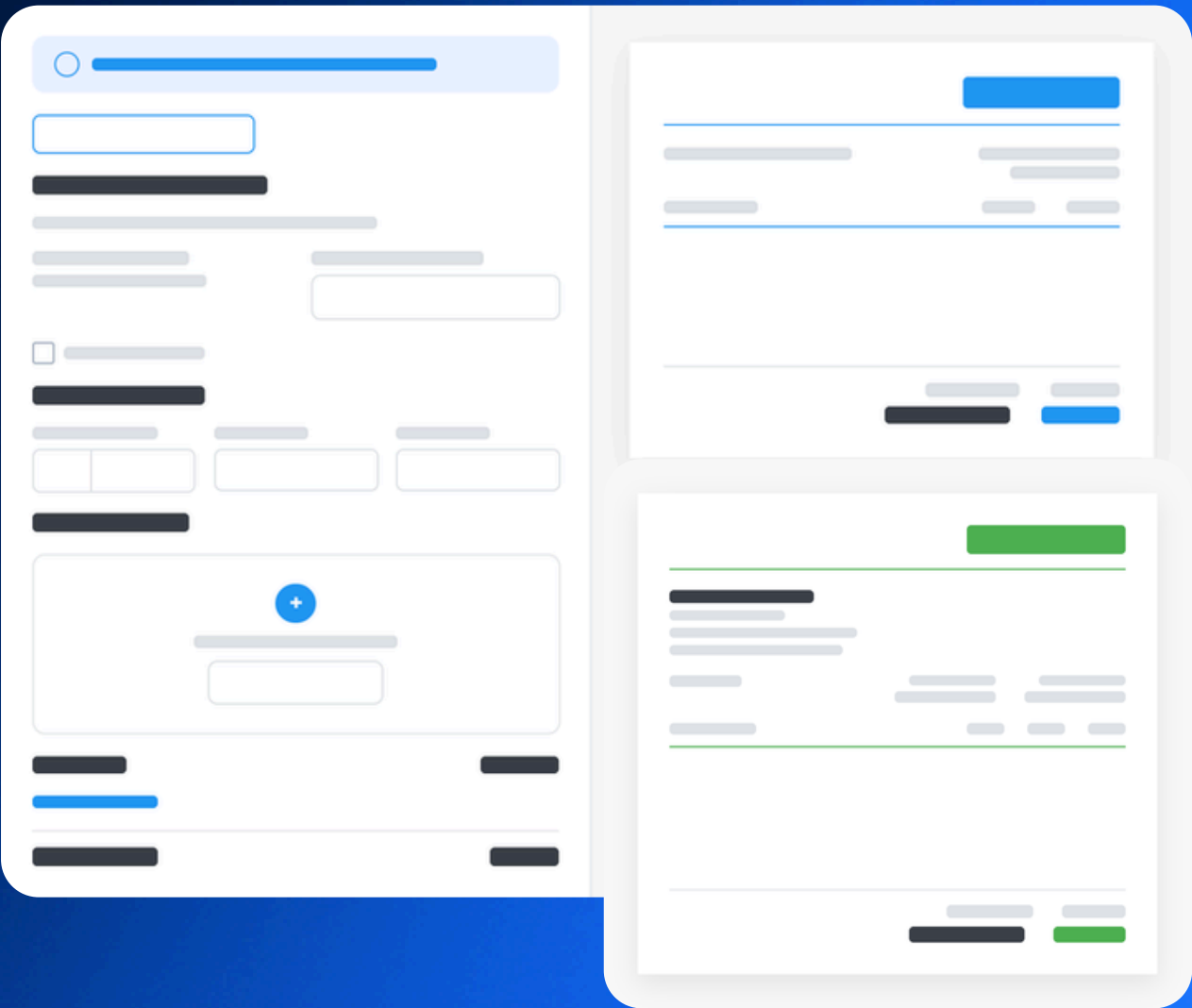


REFERENCE GUIDE

Invoicing and Estimates

Invoices, Estimates, and Getting Paid



Invoices List and Statuses

What It Is

The Invoices list is your billing dashboard. Each invoice is one row, and status filters show what is waiting, sent, paid, or late.

How It Works For Your Business

- Search for Invoices to land on the Invoices list.
- Use the status filters: Draft, Sent, Paid, and Overdue to narrow the list.
- Use the date range to see just this month or this quarter.
- Use the tabs for Invoices, Recurring, and Estimates, and the Settings button at the top.
- Click any invoice to open the editor on the left and a live preview on the right.

Invoices List and Statuses – Tips & Guidelines

Tips

- Check Overdue first each week to see who needs a nudge.
- The side preview is a quick look. Use the three-dot menu, then Preview, for the exact layout.
- Use the date range for a month-end review.
- Labels can change after updates, so look for the closest name.

DO

- Check your filters weekly
- Use the date range for reviews
- Open an invoice to see its details
- Learn each tab's job

DON'T

- Scroll a long list to find one
- Mix up Draft and Sent
- Ignore Overdue invoices
- Change a sent invoice without a look

Building and Sending an Invoice

What It Is

Building an invoice means choosing your details, a customer, products, and totals, then sending it. Saved products and saved taxes keep names and prices right.

How It Works For Your Business

- Click New, then New Invoice. Check the From block and click the logo area to add an image.
- Choose a contact. The invoice number fills in. Set the issue date and a due date that matches your terms.
- Click Add Product, pick a saved one or choose + Create Product, then change quantity or price for this invoice.
- Look for Tax Settings and Add Tax to save a tax, then apply it to the lines to be taxed. Add Discount takes a flat amount or percentage.
- Click Save for a draft, preview from the three dots, then click Send by Email & Text, Email, or Text.

Building and Sending an Invoice – Tips & Guidelines

Tips

- Save first. A saved draft is never sent until you click Send.
- Email & Text gives the best chance it gets seen. Email gives a paper trail.
- If you see a Test and Live option, use Test for practice.
- Tax goes on a line item, so an untaxed service can stay untaxed.

DO

- Preview every invoice first
- Use saved products
- Apply tax to the right lines
- Send by Email & Text when unsure

DON'T

- Retype prices by hand
- Skip the preview
- Tax every line by default
- Send a test to a real customer

How Customers Pay

What It Is

Customers open your invoice link and pay on one page with no login. You see the invoice flip to Paid and a matching entry in Transactions.

How It Works For Your Business

- The customer page shows your business info, items, totals, and due date together.
- A credit or debit card is the default way to pay, with a pay button to finish.
- Apple Pay or Google Pay may show up, depending on browser, device, country, and payment setup.
- If bank payments are turned on, the customer can also pay by ACH or bank transfer.
- Look for the option on an invoice to download a PDF copy. Search for Transactions to find the payment.

How Customers Pay – Tips & Guidelines

Tips

- Fewer steps for the customer means faster payment.
- Wallet buttons only show up for some customers, so do not rely on them.
- Open your own sent invoice as a customer to see what they see.
- A small test payment shows you the Transactions entry.

DO

- View your page like a customer
- Check the Paid status
- Match payments in Transactions
- Save a PDF for records

DON'T

- Assume everyone sees wallets
- Ask customers to log in
- Track payments in a spreadsheet
- Guess if a payment landed

Estimates and Conversion

What It Is

An estimate is a price quote sent before work starts. It has an expiry date and lets the customer accept or reject. An accepted one can become an invoice.

How It Works For Your Business

- Click the Estimates tab, then New. Pick the customer, check the estimate number, and set an Expiry Date.
- Add products like on an invoice, save, preview from the three dots, then Send by email or text.
- Statuses run Draft, Sent, Accepted, Declined, and Invoiced.
- Customers can accept or reject and leave a rejection note. You can also mark it accepted or rejected yourself.
- Open an accepted estimate and look for Create an Invoice. Review the new invoice and send it.

Estimates and Conversion – Tips & Guidelines

Tips

- Estimates are offers, so they stay apart from invoices you are owed.
- Pick the expiry date on purpose.
- Read rejection notes to improve the next quote.
- Look for pipeline value cards on the Estimates tab.

DO

- Set an expiry date
- Preview before sending
- Read rejection notes
- Review the invoice you create

DON'T

- Treat an estimate as a bill
- Skip the status check
- Mark accepted by guess
- Send without checking prices

Recurring Invoices

What It Is

A recurring invoice is a template that creates and sends invoices on a schedule, like a monthly retainer. You set it up once.

How It Works For Your Business

- Click New, then New Recurring Invoice. Choose the customer and add products.
- Set How Often: a regular interval, a specific day, or annual.
- Set a start date and choose to end by a date or after a number of occurrences.
- Look for the option to send the invoice a set number of days before it is due.
- Template statuses are Draft, Scheduled, Active, and Completed. The three-dot menu has View History, End, Clone, and Delete.

Recurring Invoices – Tips & Guidelines

Tips

- Use Clone to copy a template for a similar customer.
- View History shows which invoices the template has made.
- Pick the end rule on purpose so it does not run longer than planned.
- Edits can affect future invoices, so read the editing help first.

DO

- Name templates clearly
- Check the start date
- Use Clone for similar plans
- Check History after the first run

DON'T

- Leave end rules unset by accident
- Delete before you check History
- Guess the schedule
- Forget the send timing

Settings, Templates and Attachments

What It Is

The Settings button holds shared choices for all invoices: terms, notes, message templates, and options like tipping and processing fees.

How It Works For Your Business

- Click Settings on the Invoices & Estimates screen.
- Set global Terms & Conditions and notes that can be reused on your documents.
- Edit the email and text templates sent with invoices and estimates.
- Look for toggles to accept tips and to handle processing fees.
- Add attachments to an invoice or estimate when a customer needs a file with it.

Settings, Templates and Attachments – Tips & Guidelines

Tips

- Write terms once and reuse them.
- Keep notification wording short and clear.
- Send a test to yourself after editing a template.
- Read the in-app help before turning on tips or fees.

DO

- Write terms once
- Test templates on yourself
- Keep wording friendly
- Check toggles after changes

DON'T

- Edit templates without a test
- Write long terms
- Turn on options you do not understand
- Attach huge files

Payment Schedules and Partial Payments

What It Is

A payment schedule splits one invoice into installments with due dates. Partial payment lets a customer pay part of the balance.

How It Works For Your Business

- On an invoice, look for Payment Schedule to split the total into installments.
- Choose percentage or fixed-amount installments and give each a due date.
- Turn on partial payment when a customer may pay part of the total.
- Record the first payment to see how the balance changes.
- You can edit a schedule on a partially paid invoice. Read the help article for the rules.

Payment Schedules and Partial Payments – Tips & Guidelines

Tips

- Make sure installments add up to the full total.
- Use clear due dates so customers know what is next.
- Check the balance after each payment.
- Test with a practice invoice before using it live.

DO

- Check installments add up
- Set clear due dates
- Review the balance
- Practice first

DON'T

- Guess the split
- Change a schedule blindly
- Forget to enable partial pay
- Skip the preview

Reminders and Late Fees

What It Is

Automated reminders email or text customers about unpaid invoices. Late fees can add a charge when an invoice goes past due.

How It Works For Your Business

- Click Settings, then look for Reminder Settings.
- Name the reminder, pick a template, and write a subject.
- Set Every X days, before or after the due date or sent date, and a maximum number of reminders.
- Use the enable toggle to turn a reminder on or off.
- Look for Late Fees on an invoice and read how they apply before using them.

Reminders and Late Fees – Tips & Guidelines

Tips

- Start with one gentle reminder before the due date.
- Cap the number of reminders.
- Keep wording kind and clear.
- Test on a practice invoice before turning it on for all.

DO

- Set a maximum count
- Use a friendly subject
- Test before enabling
- Read how late fees apply

DON'T

- Remind every day
- Use harsh wording
- Enable without a test
- Add fees you did not explain

Linking, Importing and Exporting

What It Is

You can link invoices and estimates to opportunities and contacts, filter and export lists, view invoices on mobile, and import invoices from a CSV file.

How It Works For Your Business

- Link an invoice or estimate to an opportunity so it shows on that card.
- Look for the Invoices section on an opportunity card and a contact record.
- Filter the list by status and date, then look for the export option.
- Use the mobile app to view invoices and download receipts.
- Import from CSV: download the template, map your columns, and check the results.

Linking, Importing and Exporting – Tips & Guidelines

Tips

- Link documents so billing is visible where you work.
- Filter first, then export just what you need.
- Use the CSV template exactly as given.
- Import a small file first.

DO

- Link invoices to opportunities
- Filter before you export
- Use the CSV template
- Check import results

DON'T

- Import a huge file first
- Rename template columns
- Skip the results check
- Export without filters

Key Terms Glossary

Invoice

A bill sent to a customer that they can pay online.

Estimate

A price quote the customer can accept or reject.

Draft

A saved invoice that has not been sent yet.

Overdue

Past the due date and still unpaid.

Product

A saved item with a name and price for invoices.

Expiry date

The last day an estimate price is good.

Recurring invoice

An invoice template that repeats on a schedule.

Payment schedule

Installments with due dates on one invoice.

Partial payment

A payment for part of the invoice balance.

Transactions

The list where payments are recorded.

Late fee

A charge added when an invoice goes past due.

ACH

A bank transfer payment method, where available.

Getting Help

Your software changes over time, so a button, tab, or label may look a little different from what you see here. If something does not match, check the in-app help for Invoices & Estimates or look for the option with the closest name.