

Invoice Formatting from Settings

The image consists of three screenshots arranged horizontally, each with an orange numbered callout in the top-left corner. Screenshot 1 shows the 'Settings' page with the 'Invoice settings' tab selected. Screenshot 2 shows the 'Edit invoice format' dialog box. Screenshot 3 shows the 'Default note on invoice' dialog box.

1

Settings

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.

Invoice settings

2

Settings

Edit invoice format

Edit your invoices prefix and an auto-incrementing numerical suffix. This will only affect future invoices.

Invoice # prefix INV-
Next invoice sequence 3

This is how the invoice format would generate:
Invoice INV-000003

Save

3

Settings

Default note on invoice

This note will appear on any new invoice you create as a default note. You can always change it later.

Default note on invoice

Add a note that appears as default on your customer invoices.

Save

In “Settings”, navigate to the “Invoice settings” tab. Choose “Edit invoice format” and/or “+ Add default note on invoice”.

In “Edit invoice format”, fill in the “Invoice # prefix” and “Next Invoice sequence”. See option to view the invoice format. Click “Save”.

In “Default note on invoice”, fill in the text box to add a note that appears as default on customer invoices. Click “Save”.