

Customizing invoice settings (collecting payments from Customers)

Last Modified on Oct 18, 2022

Note:

This article only applies if you use our [PayPal integration to collect payments from your Customers](#). If you have any questions on how we bill you as a OnceHub Customer, go to the [Account billing article](#).

[Payment integration](#) allows you to automate booking-related financial processes. OnceHub automatically sends an invoice to your Customers when a payment is made or a refund is processed via OnceHub.

In the Invoice settings, you are able to:

- **Turn on automatic invoicing for payments and refunds:** OnceHub allows you to automatically generate an invoice for all payments and refunds made via OnceHub and add it to default scheduling and rescheduling confirmation emails sent to the Customer.
- **Customize your invoice to fit your messaging and brand:** You can easily customize the invoice template with your own text messages and company logo.
- **Customize the invoice number to work in tandem with your financial environment:** You can customize the Invoice number by adding an Invoice number prefix, a Starting invoice number, and an Invoice number increment.

In this article, you will learn how to customize the Invoice settings.

In this article:

- [Requirements](#)
- [Customizing the Invoice settings](#)

Requirements

To customize the Invoice settings, you must be a OnceHub Administrator.

Customizing the Invoice settings

1. Hover over the lefthand menu and go to the Booking pages icon → open the lefthand sidebar → **Integrations** → **Payment**.
2. Click the **Customize payment settings** button.
3. In the **Payment settings** page, click the **Invoice settings** tab (Figure 1).

Invoice settings ?

Include invoice in Default Customer email notifications i

Include invoice in Default User email notifications i

Customize your invoice:

Upload logo

JPG, JPEG, PNG, or GIF image (max 200 KB)
Up to 260 pixels wide and 65 pixels high

Invoice

Seller:
Susan Dow (susan@dow.com)

Sold to:
John Smith John@example.com
Acme corporation
+1-800-555-0199

Invoice #: 06072017-101

Transaction date: Jun 07, 2017

Description	Sessions	Amount	Total
Consultation (60 min) SCHEDULED - Tracking ID: 123456	1	200 USD	200 USD
PAID			200 USD

Thank you for your business!
If you have any questions about this invoice, please contact me at Susan Dow(susan@dow.com)

Back
Save
Save & Exit Settings

Figure 1: Invoice settings

4. In the **Invoice settings** area, check the relevant options:
 - **Include invoice in Default Customer email notifications:** By default, invoices for payment transactions will be automatically added to default scheduling and rescheduling confirmation emails sent to the Customer. Credit invoices for refund transactions will be automatically added to default cancellation emails sent to the Customer. When you uncheck this option, the invoice will be automatically removed from default email notifications. [Learn more about notification scenarios](#)
 - **Include invoice in Default User email notifications:** You can choose to add the invoice to User notifications. When checked, invoices for payment transactions will be automatically added to default scheduling and rescheduling confirmation emails sent to the User. Credit invoices for refund transactions will be automatically added to default cancellation emails sent to the User. [Learn more about notification scenarios](#)

5. In the **Customize your invoice** area, you can customize the look and feel of the invoice sent to Customers. Below is the list of fields that can be edited:
 - **Upload logo:** The image should be JPG, JPEG, PNG, or GIF image (max 200 KB) and up to 360 pixels wide and 60 pixels high.
 - **Seller** (max 100 characters): You can customize the Seller title and detailed information.
 - **Sold to** (max 50 characters): You can customize the title for the Customer information appearing on the invoice. The Customer information is dynamically added at the time of the booking and can include the Customer full name, email, company, and phone number.

- **Thank you...** (max 150 characters): You can customize the footer displayed at the bottom of the invoice.
 - **Transaction date** (max 50 characters): You can customize the title of the transaction date that will appear on the invoice.
6. To update the Invoice number, click the edit icon next to the Invoice number. The **Invoice numbering** pop-up appears (Figure 2).
- **Invoice prefix:** The Invoice prefix can be a date or a custom text. Custom text can be a maximum of ten characters: 0 to 9 and can only contain alphanumeric characters: 0-9 a-z A-Z. It does not include special characters such as *space, \, ', /, &, <, >, =, [,]*.
 - **Separator:** You can add a separator between the Invoice number prefix and the Invoice number. The separator is by default a dash "-".
 - **Starting invoice number:** The starting invoice number determines from which number you want OnceHub to start. It can be between 1 to 100,000.
 - **Invoice increments:** You can set the increment in which invoice numbers will be generated. The invoice increment can be set between 1 and 10.

The screenshot shows a modal window titled "Invoice numbering" with a close button (X) in the top right corner. The form contains the following fields and options:

- Title:** A text input field containing "Invoice #:".
- Invoice number prefix:** A dropdown menu set to "Date" and a text input field containing "mmdyyy (e.g. 06072017)".
- Add separator between the Invoice number prefix and the Invoice number
- Starting invoice number:** A text input field containing "100".
- Invoice number increments:** A text input field containing "1".

At the bottom of the modal, there is a "Cancel" button on the left and an "Apply Changes" button on the right.

Figure 2: Invoice numbering