



Invoicing User's Guide

PayPal Invoicing User's Guide

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Contents

Preface	7
About This Guide	7
Intended Audience	7
Revision History	7
Where to Go for More Information	7
Documentation Feedback	7
Chapter 1 About Invoicing	9
What is Invoicing?	9
What's the Difference Between Request Money and Invoicing?	9
Invoicing End-to-End	10
What Does Your Customer See?	11
Accessing PayPal Invoicing	13
Chapter 2 Creating Invoices	15
The Invoicing Process	15
What's in an Invoice?	17
Creating Invoices and Entering Details	17
1. Accessing the Create a New Invoice Page	19
2. Entering Your Contact Information	19
3. Entering Recipient Information	20
4. Entering Invoice Information	23
5. Entering Item Information	24
6. Entering a Discount, Shipping Fee, and Invoice Notes	26
7. Finalizing an Invoice	27
Previewing Invoices	28
Previewing an Invoice	30
Saving Invoices	30
Saving an Invoice as a Draft	30
Sending Invoices	31
Sending an Invoice	31
Printing Invoices	32

Printing an Invoice from the Preview Page 33
 Printing an Invoice from the Invoice Details Page 34

Chapter 3 Managing Your Invoices 35

About the Manage Invoices Page 35
 About Invoice Statuses 37
 Searching Invoices 38
 About the Basic Filters 39
 About the Advanced Filters 39
 Searching Invoices with a Basic Filter 40
 Searching Invoices with an Advanced Filter 41
 Reviewing Invoice Details 42
 Opening Invoice Details From the Manage Invoice Page 45
 Editing Invoices 47
 Editing an Invoice 47
 Exporting Invoice Information 49
 Invoice Summary Activity Information 50
 Invoice Details Activity Information 50
 Downloading and Saving Invoice Activity 51
 Downloading and Opening Invoice Activity 53
 Copying Invoices 54
 Copying an Invoice from the Manage Invoices Page 54
 Copying an Invoice from the Invoice Details Page 54
 Sending Invoice Reminders 55
 Sending a Reminder 55
 Canceling Invoices 56
 Canceling an Invoice from the Manage Invoices Page 56
 Canceling an Invoice from the Invoice Details Page 57
 Archiving and Unarchiving Invoices 58
 Archiving an Invoice 58
 Unarchiving an Invoice 59
 About Invoices and Shipping 61

Chapter 4 Managing Invoice Payments 63

About Invoice Payments 63
 Viewing PayPal Invoice Payments 63
 Viewing a PayPal Invoice Payment 64
 Recording Invoice Payments 65



Marking an Invoice as Paid	65
Viewing and Editing Manually Recorded Payments	66
Chapter 5 Customizing Your Invoice Information	69
About Invoice Customization.	69
Customizing Your Contact Information.	69
Editing Your Contact Information in an Invoice	70
Editing Your Contact Information in Invoice Settings	72
Including a Logo in Your Invoices	74
Adding a Logo When You Create an Invoice	75
Adding a Logo in Invoice Settings	76
Changing Your Invoice Logo.	77
Deleting Your Invoice Logo	78
Including a Logo on Your Payment Page	79
Adding Your Payment Logo	79
Changing Your Payment Logo in Invoice Settings.	80
Deleting Your Payment Logo in Invoice Settings	81
Chapter 6 Working with Invoice Templates.	83
About Invoice Templates	83
How Invoice Settings Relate to Invoice Template Contents	84
Working with Templates	85
Creating Templates	87
Saving an Invoice as a Template	87
Creating a Template in the Create a New Invoice Page	89
Adding a Template in Invoice Settings.	91
Managing Templates	94
About the Manage Your Templates Page	94
Editing a Template	94
Setting the Default Template.	98
Previewing Templates	99
Deleting Templates	101
Chapter 7 Working with the Address Book.	103
About the Address Book	103
Accessing the Address Book.	104
Adding Contacts to the Address Book	104
Saving Recipient Information to the Address Book	104

Adding a Contact in the Address Book Page . . . . .	.107
Editing Address Book Entries . . . . .	.110
Editing a Contact. . . . .	.110
Searching for Contacts. . . . .	.114
Searching for a Contact . . . . .	.115
Deleting Address Book Entries. . . . .	.115
Deleting Contacts . . . . .	.116
Chapter 8 Working with Saved Items	119
About Saved Items. . . . .	.119
What's in a Saved Item?. . . . .	.120
Adding a Saved Item. . . . .	.120
Adding an Item in an Invoice. . . . .	.120
Adding an Item in Invoice Settings. . . . .	.121
Editing Saved Items . . . . .	.123
Editing a Saved Item. . . . .	.123
Deleting Saved Items . . . . .	.125
Deleting a Saved Item . . . . .	.125
Chapter 9 Managing Your Tax Information	127
About Tax Information . . . . .	.127
Adding Tax Information. . . . .	.128
Adding Tax Information in an Invoice or Template. . . . .	.128
Adding Tax Information in Invoice Settings . . . . .	.130
Adding Tax Information in a Saved Item. . . . .	.131
Editing Tax Information. . . . .	.132
Editing a Tax . . . . .	.133
Deleting Tax Information . . . . .	.134
Deleting a Tax . . . . .	.134
Chapter 10 Invoice Administration	135
Managing Your Invoices and Payments . . . . .	.135
Maintaining Your Invoice Settings . . . . .	.136
Adding Users to Perform Invoicing Tasks . . . . .	.136
Invoicing and Reporting . . . . .	.137



Preface

About This Guide

The *Invoicing User's Guide* describes how to create and send invoices in your PayPal account.

Intended Audience

This guide is for merchants and secondary users who log in to PayPal accounts to create and send invoices.

Revision History

The following table lists the revisions made to the *Invoicing User's Guide*.

TABLE 1.1 Revision History for This Guide

Date Published	Description
September 2010	New guide.

Where to Go for More Information

For information on the administrative tasks you can perform from your PayPal account, see the *Merchant Setup and Administration Guide*. The guide is located on the Documentation page linked to the Library tab in Developer Central.

Documentation Feedback

Help us improve this guide by sending feedback to:

documentationfeedback@paypal.com

1

About Invoicing

PayPal Invoicing lets you create and send professional invoices through email. You can save invoice information for re-use, reducing the amount of time it takes to create invoices.

Read the following topics to learn more about PayPal Invoicing:

- [“What is Invoicing?” on page 9](#)
- [“What’s the Difference Between Request Money and Invoicing?” on page 9](#)
- [“Invoicing End-to-End” on page 10](#)
- [“What Does Your Customer See?” on page 11](#)
- [“Accessing PayPal Invoicing” on page 13](#)

What is Invoicing?

PayPal Invoicing provides a way to create and send invoices to your customers. Invoicing lets you save item details, tax rates, and recipients so you can use them for future invoices. You can customize how your business information appears on the invoices, making them more professional.

PayPal provides a default invoice template for you to use or you can create your own customized templates. Using customized templates saves time by storing details about your items, prices, and standard tax rates.

Using Invoicing, you send invoices by email and get paid through PayPal. Your invoice recipients can view and pay through their PayPal accounts. Recipients without PayPal accounts can pay you in several other ways.

Invoicing does not replace the Request Money feature. You can still use Request Money for those items that don’t need an invoice. You access both the Invoicing and Request Money features from the **Request Money** tab in your PayPal account.

What’s the Difference Between Request Money and Invoicing?

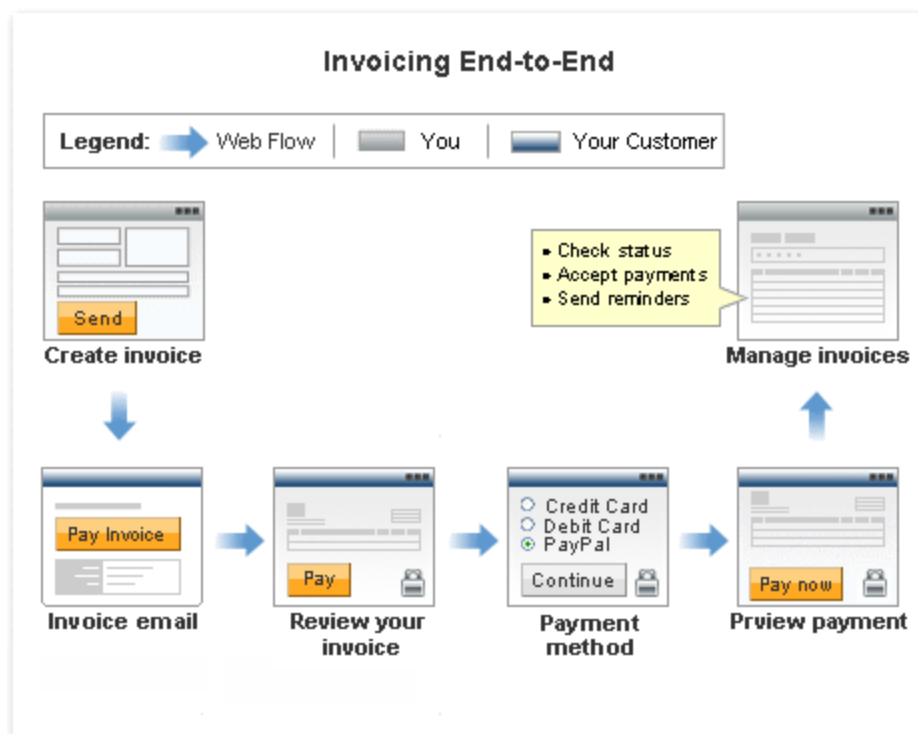
Use **Request Money** to request payment for goods or services where tracking item detail is not required, or when sending payment requests to multiple recipients. You must enter the total amount to be paid because **Request Money** does not calculate tax or add shipping amounts for you. When your recipients look at details of the money request, they see your name and email address, the amount and date requested, a subject line, and any notes you entered. When you view a payment request in **History**, you see the request information and payment information when the request is paid.

Use **Invoicing** to request payments for goods or service when you want to provide item details, have the tax and discount amounts automatically calculated, and you want to track and manage your invoices and payments. When your recipients review an invoice, they see your customized contact information, payment terms, line item details including unit prices and taxes, shipping and discount information, and invoice totals. When you view the invoice in **Manage Invoices**, you see the same details your recipient sees, invoice status information, and payment information when the invoice is paid.

Invoicing End-to-End

Invoicing has two participants: you and your customer. You create, send, and manage invoices. Your customer, the invoice recipient, receives the invoice and makes a payment.

The following illustrates the invoice flow for both you and your customer.



1. You create the invoice.

When you create an invoice, you identify the invoice recipient, set the payment terms, enter item details, enter shipping or discount amounts, and enter notes to the recipient, if necessary. When you send the invoice, an email is sent to the invoice recipient.

See [“Creating Invoices” on page 15](#) for instructions.

2. Your customer receives an email that contains a link to the invoice.

Customers can use the email link to view invoices. PayPal account holders can view invoices through their PayPal accounts.

3. Your customer opens the invoice and reviews it.

Your customer can start the payment process by clicking **Pay**.

4. Your customer determines the payment method.

Your customer can pay in one of two ways:

- Using a PayPal account.
- By credit or debit card, check, or bank transfer.

5. Your customer reviews the payment.

After reviewing the payment information, your customer approves the payment.

6. You manage invoices and payments.

You can check an invoice's status and determine whether to send a reminder about payment, cancel the invoice, or print the invoice to mail to the recipient.

When you receive a PayPal payment, PayPal updates the invoice status and provides a link to the Transaction Details for the payment. The money is added to your account.

If your customer pays by another method, you can manually record the payment for the invoice.

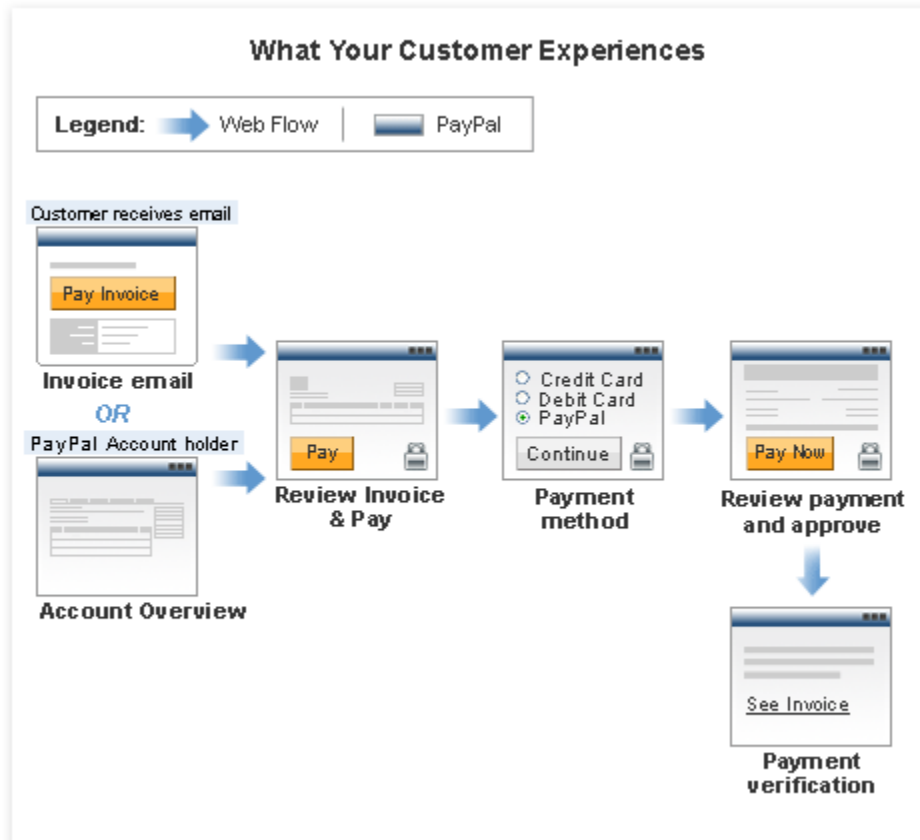
See [“Managing Invoice Payments” on page 63](#) and [“Managing Your Invoices” on page 35](#) for more information.

See [“What Does Your Customer See?” on page 11](#) for more information about your customer's payment experience.

What Does Your Customer See?

When you send invoices, email notifications are sent to your customers (invoice recipients). Invoice emails contain a summary of the invoice information and requests payment. Email messages also contain a link and a URL that open in the invoice.

The following illustration shows the steps your customers take to pay invoices.



1. Your customer opens an invoice

Invoice recipients can open their invoices in the following ways:

- Click the **Pay Invoice** button in the email.
- Copy the invoice URL in the email message and paste it in a web browser.
- Open their PayPal accounts and open the invoice from their **Account Overview** or **History** page.

2. Your customer reviews the invoice and clicks **Pay**.

The **Review your invoice** page displays the invoice details including payment terms, item details, and the invoice totals. Before starting the payment process, your customer can print a copy of the invoice.

3. Your customer selects the payment method.

Customers who want to use their PayPal accounts to pay the invoice must first log in (if they are not already) and select the payment method from their account.

Customers who do not use a PayPal account to pay the invoice can enter debit or credit card information for online payment.

Recipients who pay by offline methods should contact you for payment instructions.

4. Your customer reviews and approves the payment.

The **Review your payment** page displays a summary of the payment information. Your customers click **Pay Now** to finalize payments.

5. Your customer receives verification of the completed payment.

A final page displays the transaction ID for the payment and an order summary email is sent to your customer.

PayPal account holders can see invoice and payment details through their **Account Overview** or **History** pages.

Accessing PayPal Invoicing

You access PayPal Invoicing by clicking the **Request Money** tab in your PayPal account. **Request Money** displays the **Request Money** subtab and three invoicing subtabs.

NOTE: The **Request Money** feature is not an invoicing component and is not included in this guide.

Use the following subtabs to access invoicing components:

- **Manage Invoices:** Opens the **Manage Invoices** page.
Use this page to review your invoices, search for invoices, and perform invoice actions. See [“Managing Your Invoices” on page 35](#) for information about this page and how to use it.
- **Create Invoice:** Opens the **Create a new invoice** page.
Use this page to create an invoice or save an invoice as a template. Also, you can save information to your **Invoice Settings**, such as customer contact information, to use again later. See [“Creating Invoices” on page 15](#) to learn how to create invoices.
- **Invoice Settings:** Opens the **Enter your contact information** page with an **Invoice Settings** navigation box on the left.
Invoice Settings lets you save your invoice contact information and logo, your payment logo, tax information, items to invoice, invoice templates, and customer contact information. Use the **Invoice Settings** navigation box to open one of these pages. For example, click **Address book** to open the **Address book** page.
See the following sections to learn about **Invoice Settings**.
 - [“Customizing Your Invoice Information” on page 69](#)
 - [“Working with Invoice Templates” on page 83](#)
 - [“Working with the Address Book” on page 103](#)
 - [“Working with Saved Items” on page 119](#)
 - [“Managing Your Tax Information” on page 127](#)

2

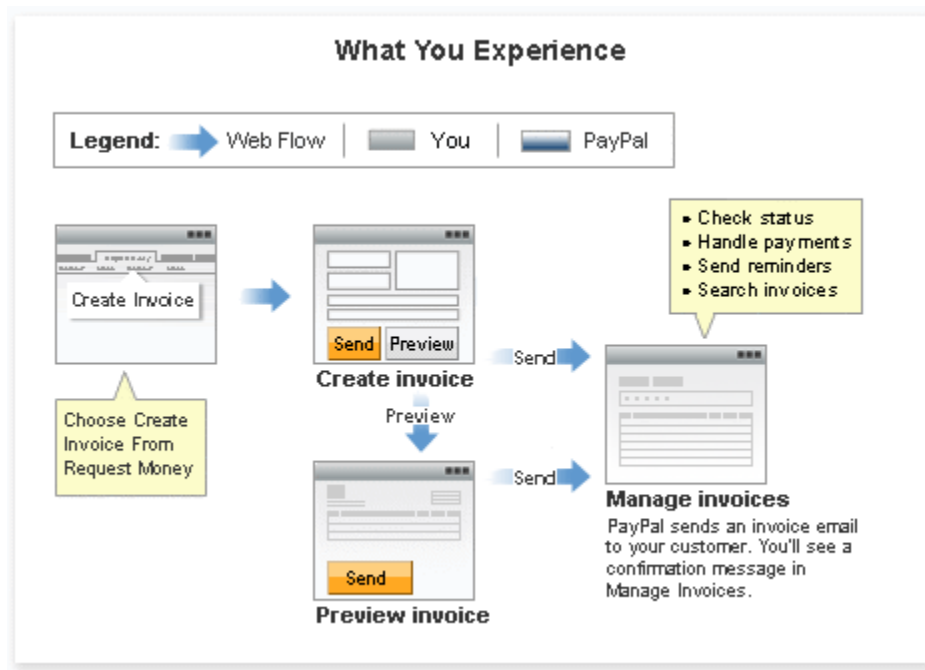
Creating Invoices

Create invoices for goods and services through the **Request Money** tab.

- “The Invoicing Process” on page 15
- “Creating Invoices and Entering Details” on page 17
- “Previewing Invoices” on page 28
- “Saving Invoices” on page 30
- “Sending Invoices” on page 31
- “Printing Invoices” on page 32

The Invoicing Process

The invoicing process begins with creating an invoice and ends with managing the invoices.



1. Create an invoice.

You create an invoice for goods and services by clicking **Create Invoice** from **Request Money**.

When you first open the **Create a new invoice** page, it automatically selects the default invoice template for your account. In the beginning, it is a PayPal-defined template. You can create your own templates and customize some of the invoice entries, such as the payment terms shipping cost. The template also identifies the currency to use for your invoices. See [“Working with Invoice Templates” on page 83](#) for instructions.

The **Create a new invoice** page displays the primary contact information from your **Account Profile**. You can change the information displayed by selecting an alternate address or email stored in your profile. You can customize your contact information by specifying what information to display, adding a web site URL or fax number, and including a logo. See [“Customizing Your Invoice Information” on page 69](#) for instructions.

NOTE: Customizing contact information in invoicing does not affect the information in your **Account Profile**. To edit your address, phone number, or email, go to your **Profile Summary** page.

2. Enter invoice details.

You identify the invoice recipient (your customer) by email address. You can also enter optional billing and shipping addresses for the invoice recipient. You can store this information in your address book to use in future invoices. See [“Working with the Address Book” on page 103](#) for instructions.

You add one or more items to invoice by entering item names or your product IDs. For each item, you enter a date, a quantity, and a unit price. If an item is subject to tax, you can select the rate. You can store item information for reuse by clicking a link on the invoice or by adding items through the **Invoice Settings** page. You can also store tax information in the **Invoice Settings** page. See [“Working with Saved Items” on page 119](#) and [“Managing Your Tax Information” on page 127](#) for instructions.

As you complete each item, the invoice amounts are automatically calculated. You can apply a discount to the invoice, add a shipping/handling fee, and add a tax rate for the shipping fee. Other things you can include in the invoice are a terms and conditions description and a note to the recipient. You can include a memo that does not appear on the invoice and can be used as an advanced search criteria in **Manage Invoices**.

When you have entered invoice information, you can preview how it will appear to the recipient, save it for a later time, save it as a template, or close it.

See [“Creating Invoices and Entering Details” on page 17](#) for instructions.

3. Preview the invoice (optional).

You can use the **Preview invoice** page to see how the invoice will appear to your customer. From Preview invoice, you can send the invoice, print it, or edit it.

See [“Previewing Invoices” on page 28](#) and [“Printing Invoices” on page 32](#) for instructions.

4. Send the invoice to your customer.

After you enter and review the invoice, click **Send**. PayPal sends an email notification to your customer about the invoice.

See [“Sending Invoices” on page 31](#) for instructions.

5. Manage your invoices.

After sending an invoice, you can check the status of your invoices, send reminders to your customers, manage invoice payments, and research invoices in the **Manage Invoices** page. You can also review invoices in your **History** page.

See [“Managing Your Invoices” on page 35](#) for instructions.

What’s in an Invoice?

Invoices contain the following information:

- **Your contact information:** Your name, email address, street address, phone number, company name, and a logo.
- **Invoice recipient (your customer) information:** Email address (required), billing address, shipping address, and business name.
- **Invoice information:** Invoice number, invoice date, payment terms, and due date.
- **Item and invoice details:** Name, date, quantity, unit price and tax for each item, discount, shipping amounts, terms and conditions, and notes to the recipient.
- **Memo:** Text to track with the invoice.


When you create an invoice, the **Create a new invoice** page accesses information from your **Account Profile** and **Invoice Settings** to pre-fill some of the fields. As you enter invoice information, additional **Invoice Settings** are available to help speed up invoice entry. For example, if you save tax rate information in **Invoice Settings**, you can select a saved rate to use in the invoice.

Creating Invoices and Entering Details

You can create an invoice right away using the PayPal Default Template. You can add your own templates later or save your current invoice to use as a template.

As you create an invoice, you can choose to save some of the information in your **Invoice Settings** to reuse at a later time. This information includes some of your contact information, your logo, recipient contact information, invoice line items, and tax amounts.

You use the **Create a new invoice** page to enter invoice information. The following illustration shows the **Create a new invoice** page as it appears the first time you open it.

Create a new invoice Secure 

1 Select a template PayPal Default Template (default) ▾ [Looking for your old templates?](#)

2 **Your contact information**

Your logo


[Add logo](#)

Maya Twain
491 9th Street
Austin, TX 78701
United States
Phone: Don't show on invoice
pgrisier-us-02@paypal.com


[Edit contact information](#)


4 **Invoice information**

Invoice number

Invoice date [Learn more](#)
 

Payment terms [Learn more](#)
 ▾

Due date
 

3 **Send to** [Address book](#) 

Recipient's email address

[Add billing and shipping information](#) (optional)

5 **Select currency** USD - U.S. Dollars ▾

Item name/ID	Date	Quantity	Unit price	Tax	Amount
<input type="text"/>	<input type="text"/>	1	<input type="text"/>	No tax ▾	\$ 0.00
Description (optional) <input type="text"/>					+

6 **Terms and conditions**
For example: your return or cancelation policy

Characters: 1000

Note to recipient

Characters: 1000

Subtotal \$ 0.00
Discount \$ ▾ \$ 0.00
Shipping/handling \$ 0.00
Tax on shipping No tax ▾
Total \$ 0.00

Memo (your recipient won't see this)

Characters: 150

7 Send Preview Save Invoice Save as Template Close

The numbers in this illustration correspond with the instruction steps in this chapter:

- “1. Accessing the Create a New Invoice Page” on page 19
- “2. Entering Your Contact Information” on page 19
- “3. Entering Recipient Information” on page 20
- “4. Entering Invoice Information” on page 23
- “5. Entering Item Information” on page 24
- “6. Entering a Discount, Shipping Fee, and Invoice Notes” on page 26
- “7. Finalizing an Invoice” on page 27

1. Accessing the Create a New Invoice Page

1. Log in to your PayPal account.
2. Click the **Request Money** tab.
3. Click **Create an Invoice**.

The **Create a new invoice** page opens. The default template is selected automatically. If you have not added your own templates yet, the **PayPal Default Template** is selected.

4. To use a different template, select one from **Select a template**.

See “[Working with Invoice Templates](#)” on page 83 for more information.

2. Entering Your Contact Information

1. Edit **Your contact information**.

The displayed contact information is stored in your **Account Profile** information. If your address, phone number, or email are incorrect, you must correct them in your **Profile** page. You can add more contact information or control whether your phone numbers or email address appear in the invoice by customizing your contact information. See “[Customizing Your Invoice Information](#)” on page 69 for instructions.

2. Add or change the logo for the invoice.

Setting	Action
Add logo	Click to add a logo to the template. This setting appears when the template does not have a logo.
Change logo	Click to use a different logo. This setting appears when the template already contains a logo.
Remove logo	Click to delete the logo. This setting appears when the template already contains a logo.

Your contact information

Your logo

[Add logo](#)

Maya Twain
491 9th Street
Austin, TX 78701
United States
Phone: Don't show on invoice
mtwain@twaingroup.com

[Edit contact information](#)

See “Including a Logo in Your Invoices” on page 74 for detailed instructions.

3. Entering Recipient Information

1. Enter the Recipient’s email address. (Required)

As you type the email address, you will see a list of your address book contacts that match the characters you enter, starting with the third character. The search process looks through the address book for matches in email addresses, names, and business names and shows all matches in the list.

If your recipient is in the list, select it. If not, continue entering the address until you have entered the correct recipient email address.

- Or -

Click **Address book** to search for a recipient in your address book and return it to the invoice. See “Searching for a Contact” on page 115 for instructions.

2. Click Add billing and shipping information. (Optional)

The **Recipient information** page opens. If you selected a recipient from the address book, the billing and shipping information fields display the recipient’s saved information.

Recipient information

Send to
 Recipient's email address

Billing information (optional)

First name

Last name

Business name

Country

Address Line 1

Address Line 2 (optional)

ZIP Code

City/State

Additional information [What is this?](#)

Update recipient's billing information in my address book

Shipping information (optional)

Don't show shipping information
 Same as billing address
 Enter a different address

First name

Last name

Business name

Country

Address Line 1

Address Line 2 (optional)

ZIP Code

City/State

Update recipient's shipping information in address book
The recipient's name and the business name won't be saved with the shipping information.

3. Enter Billing information.

Setting	Action
First name	Enter the recipient's first or given name.
Last name	Enter the recipient's last or family name.
Business name	Enter the name of recipient's business.
Country	Select the country for the billing address.
Address line 1	Enter up to 2 lines of the contact's billing address.
Address line 2	


Setting	Action
Zip code	Enter the zip or postal code.
City/State	Enter the city name for the billing address in the first field. Select a state code from the drop down list in the second field.
Additional information	Enter any information you want to appear on the invoice. For example, use this field to track the contact's account number.
Update recipient's billing information in my address book	Select this option to save the billing information to your address book.

4. Click **Enter a different address** to add **Shipping information**.

Setting	Action
First name	Enter the recipient's first or given name.
Last name	Enter the recipient's last or family name.
Business name	Enter the name of recipient's business.
Country	Select the country for the shipping address.
Address line 1 Address line 2	Enter up to 2 lines of the contact's shipping address.
Zip code	Enter the zip or postal code.
City/State	Enter the city name for the shipping address in the first field. Select a state code from the drop down list in the second field.
Update recipient's shipping information in address book	Select this option to save the shipping information to your address book.

5. Click **Save**.

The **Create a new invoice** page displays the recipient's billing and shipping information.

Send to [Address book](#) 

Recipient's email address
mbrown@xyz.com
[Update recipient email](#)

Billing address
Mary Brown
12345 First Street
San Jose, CA 95120
United States

Shipping address
Mary Brown
99 Main Street
San Jose, CA 95121
United States

[Edit billing and shipping address](#)

4. Entering Invoice Information

Review the **Invoice Information** section and make any necessary changes.

1. Change the **Invoice number** to use a different numbering system than the default.

Invoice numbering automatically starts with 0001 and increments by 1 for each subsequent invoice. You can use the default numbering system or use one of your own.

2. Change the **Invoice date** to use a different date.

The **Invoice date** is automatically set to today's date. Enter the date of the invoice or select one from the calendar control.

You can use an invoice date that is after the current date. However, when you click **Send**, the invoice is sent right away regardless of the date you entered.

3. Change the **Payment terms**.

Select the number of days before payment is due. This field is automatically set to **Due on receipt**. For example, to specify that full payment is due in 30 days, select **Net 30**.

NOTE: When you select a different term, the invoice **Due date** might change to match the option you selected.

4. Change the **Due date** only if you selected **Due on date specified** in **Payment terms**.

The **Due date** is automatically set to match the **Payment terms**. For example, if you select **Net 30**, the due date changes to a date that is 30 days after the **Invoice date**.

NOTE: If you enter a date in **Due date**, **Payment terms** will automatically change to **Due on date specified**.

Invoice information

Invoice number

Invoice date [Learn more](#)

Payment terms [Learn more](#)

Due date

5. Entering Item Information

Your invoice must contain at least one item before you can send it.

- If you started with the **PayPal Default Template**, you must add item information.
- If you started with a template that contains item information, review the included items and make any necessary changes. You can add more items, if necessary.

Select currency

Item name/ID	Date	Quantity	Unit price	Tax	Amount
<input type="text"/>	<input type="text"/>	1	<input type="text"/>	No tax	\$ 0.00
Description (optional) <input type="text"/>					

Complete the following information for each item.

1. Enter the **Item name/ID**.

If you have saved items, you can select one from the list that appears when you click in the field.

2. Enter the **Date** for the item.

When you tab or click in the date field, a **Calendar** opens. Select the date from the **Calendar** or type the date in the field.

3. Enter the number of items in **Quantity**.

4. Enter a **Unit price**.

If you selected a saved item, the stored unit price displays.

5. Select the **Tax** for this item.

- If you selected a saved item with an assigned tax rate, the **Tax** displays. To change it, select a tax from the list.
- If the item does not have a tax, select **No tax**.
- If the correct tax rate is not listed, select **Add tax**. See [“Adding Tax Information in an Invoice or Template” on page 128](#) for instructions.

Taxes are not displayed at the item level. The taxes applied to the invoice displays above the invoice total.

6. Enter an item **Description**. (Optional)

7. Click **Save item** to add it to your **Invoice Settings**.

When you save an item, **Save item** changes to **Item saved**. The item will appear in the **Saved items** page of your **Invoice Settings**. See [“Working with Saved Items” on page 119](#) for more information.

8. Review the item **Amount**.

The **Amount** is calculated by multiplying **Quantity** times **Unit price**. **Amount** does not include any specified tax for the item at this level. Taxes are totalled for the invoice and display above the invoice total.

9. To remove an item from the invoice, click **Delete row**.

10. Click the **Plus** button to add more blank rows to the item section.

NOTE: Each time you add an item to the invoice, an empty item row is added to the end of the list. The **Plus** button is another way to add rows to the invoice.

Item name/ID	Date	Quantity	Unit price	Tax	Amount	
White Logo T-Shirt	6/28/2010	1	20.00	No tax	\$ 20.00	
Description (optional)					Item saved	Delete row +
Black Hat - Large Logo	6/28/2010	1	25	No tax	\$ 25.00	
Description (optional)					Save item	Delete row +
		1		No tax	\$ 0.00	
Description (optional)						Delete row +

6. Entering a Discount, Shipping Fee, and Invoice Notes

You can specify additional information that applies to the entire invoice. This information includes discounts, shipping and handling costs, and invoice notes.

1. Enter a **Discount** amount and select the type of discount.

Discount applies to the entire invoice and appears in the invoice totals section.

NOTE: If you want the discount to appear in the invoice items list, enter it as an invoice item with a negative amount.

2. Enter a **Shipping/handling** amount.
3. If your shipping or handling fee is subject to tax, select a tax rate from **Tax on shipping**.

If the correct tax rate is not listed, add a new tax. See [“Adding Tax Information in an Invoice or Template” on page 128](#) for instructions.

4. Enter **Terms and conditions** text, up to 1,000 characters. This text appears in the invoice.
5. Enter **Note to recipient** text, up to 1,000 characters. This text appears in the invoice.

6. Enter **Memo** text, up to 150 characters. This text does not appear in the invoice.

Terms and conditions For example: your return or cancelation policy No returns after 30 days. Characters: 975		Subtotal \$ 45.00 Discount 2 \$ -2.00 Shipping/handling 4.95 \$ 4.95 Tax on shipping No tax CA 8.25% \$ 3.71 Total \$ 51.66
Note to recipient Thanks for your order! Characters: 978		
Memo (your recipient won't see this) Characters: 150		
Send Preview Save Invoice Save as Template Close		

7. Finalizing an Invoice

When you have entered invoice information, you can perform several tasks using the buttons at the bottom of the page.

Terms and conditions For example: your return or cancelation policy No returns after 30 days. Characters: 975		Subtotal \$ 45.00 Discount 2 \$ -2.00 Shipping/handling 4.95 \$ 4.95 Tax on shipping No tax CA 8.25% \$ 3.71 Total \$ 51.66
Note to recipient Thanks for your order! Characters: 978		
Memo (your recipient won't see this) Characters: 150		
Send Preview Save Invoice Save as Template Close		

- **Send** the invoice. See [“Sending Invoices”](#) on page 31.

- **Preview** the invoice to see it from your recipient's point of view. See [“Previewing Invoices” on page 28](#).
- **Save invoice** as a draft to complete or use as a template at a later time. See [“Saving Invoices” on page 30](#).
- **Save as Template** to use the current invoice again. See [“Saving an Invoice as a Template” on page 87](#).
- **Close** the invoice.

When you close an invoice, a dialog box opens and gives you the option of saving your changes. Click **Don't Save** to discard your changes.

Previewing Invoices

You can preview how an invoice will look to your customer before sending it. The **Preview invoice** page displays the invoice information you have entered. You can preview the invoice just before sending it or any time you want to see how the invoice looks.

Preview invoice

Send Edit Print

INVOICE

Maya Twain
491 9th Street
Austin, TX 78701
United States
Phone: Don't show on invoice
mtwain@twaingroup.com

Invoice number	0006
Invoice date	7/14/2010
Payment terms	Due on receipt
Due date	7/14/2010

Bill To
mbrown@xyz.com
Mary Brown
12345 First Street
San Jose, CA 95120
United States

Ship To
Mary Brown
99 Main Street
San Jose, CA 95121
United States

Description	Quantity	Unit price	Amount
Shirt - 12345 - White Logo T-Shirt	1	\$20.00	\$20.00
Hat - 23456 - Black Hat with small logo	1	\$25.00	\$25.00
Terms and conditions No returns after 30 days.		Subtotal	\$45.00
Note to recipient Thanks for your order!		Shipping/handling	\$4.95
		CA 8.25%	\$3.71
		Total	\$53.66 USD

Send Edit Print

After reviewing the invoice, you can send, edit, or print it from the **Preview invoice** page.

Previewing an Invoice

1. Open the **Create a new invoice** page and enter invoice information.
See [“Creating Invoices and Entering Details” on page 17](#) for detailed instructions.
2. Click **Preview** at the bottom of the **Create a New Invoice** page.
The **Preview** page opens. The **Preview** box displays your contact information, invoice dates, payment terms, and the invoice information you entered.
3. Review the invoice and determine whether it is ready to send.
4. Perform one of the following actions:
 - Click **Send** to send the invoice to the customer.
See [“Sending Invoices” on page 31](#) for more information.
 - Click **Edit** to go back to the **Create a new invoice** page.
See [“Creating Invoices and Entering Details” on page 17](#) for more information.
 - Click **Print** to make a hard-copy of the invoice.
See [“Printing Invoices” on page 32](#) for instructions.

Saving Invoices

There might be occasions when you want to save an invoice without sending it. For example, if you need to clarify an order, you can enter the invoice information you have and save it as a draft. When you know how to handle the order, you can open the saved invoice and complete it.

When you save an invoice as a draft, a time stamp appears below the button indicating the date and time your invoice was saved. You can access saved invoices in the **Manage Invoices** page. See [“Managing Your Invoices” on page 35](#) for information about this page.

You can also save an invoice as a template. See [“Saving an Invoice as a Template” on page 87](#) for instructions.

Saving an Invoice as a Draft

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click **Create Invoice**.
The **Create a new invoice** page opens.
3. Enter information for the invoice.
See [“Creating Invoices and Entering Details” on page 17](#) for instructions.

4. Click **Save Invoice** at the bottom of the page.

The date and time you saved the invoice appears at the bottom of the page.

The screenshot shows a form with a memo field and several buttons. The memo field is labeled "Memo (your recipient won't see this)" and has a character count of 150. Below the memo field are five buttons: "Send" (highlighted in orange), "Preview", "Save Invoice" (highlighted with a black border), "Save as Template", and "Close". At the bottom of the form, it says "Last saved on July 14, 2010 at 12:48 PM PDT".

Sending Invoices

After you enter invoice information, you can send the invoice from the **Create a new invoice** page or preview it before sending.

When you send invoices, an email notifications are sent to your recipients. PayPal account holders see invoices in their account History. You can see the invoices in your **Manage Invoices** page.

See [“Managing Your Invoices” on page 35](#) for more information.

Sending an Invoice

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click the **Manage Invoices** subtab.

The **Manage invoices** page opens.

3. Click the **Request Money** tab and then click **Create Invoice**.

The **Create a new invoice** page opens.


4. Enter information for the invoice.



See [“Creating Invoices and Entering Details” on page 17](#) for instructions.

5. Click **Send** to send the invoice.






The **Manage Invoices** page opens. A message at the top of the page confirms that your invoice was sent. Your invoice appears at the top of the invoice list.

Manage invoices

 We've sent your invoice 0001.

 **Request Money**  **Create an Invoice**

Basic filter Advanced filter [What's new?](#) | [Invoice help](#)

 All active (1)  Unsent (0)  Unpaid (1)  Paid (0)  Past due (0)

Results: 1 invoice found Download: [CSV](#)

20 items per page [Previous](#) | [Next](#)

[Archive](#) [What's this?](#)

<input type="checkbox"/>	Invoice date	Due date	Recipient	Status	Invoice #	Action	Amount	Memo
<input type="checkbox"/>	Jun 28, 2010	Jun 28, 2010	ABC Corp	Sent	0001	Remind <input type="button" value="v"/>	\$49.95 USD	

[Archive](#) [What's this?](#)

20 items per page [Previous](#) | [Next](#)

See “[Managing Your Invoices](#)” on page 35 for more information.

Printing Invoices

If you need a copy of the invoice to send to your customer or for your records, you can print it from the **Preview** page or from the **Invoice Details** page. A print version of the invoice displays in a separate window.

INVOICE																															
Maya Twain 491 9th Street Austin, TX 78701 United States Phone: Don't show on invoice mtwain@twaingroup.com		<table border="1"> <tr> <td>Invoice number</td> <td>0006</td> </tr> <tr> <td>Invoice date</td> <td>7/14/2010</td> </tr> <tr> <td>Payment terms</td> <td>Due on receipt</td> </tr> <tr> <td>Due date</td> <td>7/14/2010</td> </tr> </table>		Invoice number	0006	Invoice date	7/14/2010	Payment terms	Due on receipt	Due date	7/14/2010																				
Invoice number	0006																														
Invoice date	7/14/2010																														
Payment terms	Due on receipt																														
Due date	7/14/2010																														
Bill To mbrown@xyz.com Mary Brown 12345 First Street San Jose, CA 95120 United States		Ship To Mary Brown 99 Main Street San Jose, CA 95121 United States																													
<table border="1"> <thead> <tr> <th>Description</th> <th>Quantity</th> <th>Unit price</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>Shirt - 12345 - White Logo T-Shirt</td> <td>1</td> <td>\$20.00</td> <td>\$20.00</td> </tr> <tr> <td>Hat - 23456 - Black Hat with small logo</td> <td>1</td> <td>\$25.00</td> <td>\$25.00</td> </tr> <tr> <td colspan="2"> Terms and conditions No returns after 30 days. </td> <td colspan="2"> Subtotal \$45.00 </td> </tr> <tr> <td colspan="2"> Note to recipient Thanks for your order! </td> <td colspan="2"> Shipping/handling \$4.95 </td> </tr> <tr> <td colspan="2"></td> <td colspan="2"> CA 8.25% \$3.71 </td> </tr> <tr> <td colspan="2"></td> <td colspan="2"> Total \$53.66 USD </td> </tr> </tbody> </table>		Description	Quantity	Unit price	Amount	Shirt - 12345 - White Logo T-Shirt	1	\$20.00	\$20.00	Hat - 23456 - Black Hat with small logo	1	\$25.00	\$25.00	Terms and conditions No returns after 30 days.		Subtotal \$45.00		Note to recipient Thanks for your order!		Shipping/handling \$4.95				CA 8.25% \$3.71				Total \$53.66 USD			
Description	Quantity	Unit price	Amount																												
Shirt - 12345 - White Logo T-Shirt	1	\$20.00	\$20.00																												
Hat - 23456 - Black Hat with small logo	1	\$25.00	\$25.00																												
Terms and conditions No returns after 30 days.		Subtotal \$45.00																													
Note to recipient Thanks for your order!		Shipping/handling \$4.95																													
		CA 8.25% \$3.71																													
		Total \$53.66 USD																													

After printing, the window closes.

Printing an Invoice from the Preview Page

1. Enter invoice information in the **Create a new invoice** page.

See [“Creating Invoices and Entering Details” on page 17](#) for detailed instructions.

2. Click **Preview** at the bottom of the **Create a new invoice** page.

The **Preview** page opens. The **Preview** box displays your invoice information.

3. Click **Print**.

A **Print Invoice** window and the **Print** dialog box open. Your invoice information displays in a printer-ready format in the **Print Invoice** window.

4. Select a printer in the **Print** dialog box.
5. Click **Print**.

After printing, close the **Print Invoice**. You can now perform other actions on the **Preview** page.

Printing an Invoice from the Invoice Details Page

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click the **Manage Invoices** subtab.
The **Manage invoices** page opens.
3. Click an invoice number in the **Invoice #** column of the **Manage Invoices** page.

The **Invoice details** page opens. The page displays invoice status information and the invoice details.

4. Click **Print**.

A **Print Invoice** window and the **Print** dialog box open. Your invoice information displays in a printer-ready format in the **Print Invoice** window.

5. Select a printer in the **Print** dialog box.
6. Click **Print**.

After printing, close the **Print Invoice** window. You can now perform other actions on the **Invoice details** page or return to the **Manage Invoices** page.

3

Managing Your Invoices

After sending invoices, you'll want to manage and track your invoices and payments. The **Manage Invoices** page contains a set of tools for you to quickly find the invoices you need and perform invoicing tasks.

Read the following topics to learn about managing your invoices.

- [“About the Manage Invoices Page” on page 35](#)
- [“Searching Invoices” on page 38](#)
- [“Reviewing Invoice Details” on page 42](#)
- [“Editing Invoices” on page 47](#)
- [“Exporting Invoice Information” on page 49](#)
- [“Copying Invoices” on page 54](#)
- [“Sending Invoice Reminders” on page 55](#)
- [“Canceling Invoices” on page 56](#)
- [“Archiving and Unarchiving Invoices” on page 58](#)
- [“About Invoices and Shipping” on page 61](#)

See [“Managing Invoice Payments” on page 63](#) for instructions on handling invoice payments.

About the Manage Invoices Page

The **Manage Invoices** page opens when you click **Manage invoices** on the **Request Money** tab. This page automatically opens after you send or save an invoice. **Manage Invoices** is the main page to use when managing your invoices and payments.

When you click the **Request Money** tab, it displays either the **Request Money** page or the **Manage Invoices** page depending on the last request you performed. For example, if you sent an invoice the last time you visited this tab, the **Manage Invoices** page opens.

Manage Invoices | Request Money | Create Invoice | Invoice Settings

Manage invoices

[Request Money](#) [Create an Invoice](#)

[Basic filter](#) [Advanced filter](#) [What's new?](#) | [Invoice help](#)

[All active \(4\)](#) [Unsent \(1\)](#) [Unpaid \(0\)](#) [Paid \(2\)](#) [Past due \(0\)](#)

Results: 4 invoices found Download: [CSV](#)

20 items per page Page 1 of 1 [Previous](#) | [Next](#)

<input type="checkbox"/>	Invoice date	Due date	Recipient	Status	Invoice #	Action	Amount	Memo
<input type="checkbox"/>	Jun 28, 2010	Jun 28, 2010	ABC Corp	Paid	0004	Copy	\$24.90 USD	
<input type="checkbox"/>	Jun 28, 2010	Jun 28, 2010	ABC Corp	Marked as paid	0003	Copy	\$63.12 USD	
<input type="checkbox"/>	Jun 28, 2010	Jun 28, 2010	ABC Corp	Draft	0002	Copy	\$26.90 USD	
<input type="checkbox"/>	Jun 28, 2010	Jun 28, 2010	ABC Corp	Canceled	0001	Copy	\$49.95 USD	

20 items per page Page 1 of 1 [Previous](#) | [Next](#)

Manage Invoices displays the list of invoices that you have sent or saved. It displays the following information for each invoice:

Column	Description
Invoice date	Date sent or saved.
Due date	Date payment is due according to the payment terms in the invoice.
Recipient	Name of the recipient or the recipient's company name if one was used in the invoice. If you saved the recipient in the address book, click the recipient to open its address book entry.
Status	Current status of the invoice. See "About Invoice Statuses" on page 37 for a list of statuses.
Invoice #	ID number assigned to the invoice. Click this number to open Invoice details .

Column	Description
Action	Available actions for the invoice depending on the invoice's status. If there are multiple actions, an arrow displays in the box.
Amount	Invoice total amount.
Memo	Displays an icon when the invoice contains a note to yourself. Hover over the icon to display the contents of the memo.

Manage Invoices displays 20 invoices per page. If there are multiple pages of invoices, **Page** displays the number of the current page and the total number of pages. You change pages by clicking **Previous** and **Next**, which display at the top and bottom of the invoice list.

The screenshot shows the 'Manage invoices' interface. At the top, there are buttons for 'Request Money' and 'Create an Invoice'. Below these are filter tabs for 'Basic filter' and 'Advanced filter'. A summary bar shows counts for 'All active (21)', 'Unsent (5)', 'Unpaid (14)', 'Paid (2)', and 'Past due (0)'. The main content area shows 'Results: 21 invoices found' and '20 items per page'. On the right, there is a 'Download: CSV' link and pagination controls for 'Page 1 of 2' with 'Previous' and 'Next' buttons. A table of invoices is displayed below, with columns for Invoice date, Due date, Recipient, Status, Invoice #, Action, Amount, and Memo. Two invoices are visible: one 'Sent' for \$41.00 USD and one 'Marked as paid' for \$30.00 USD.

Use other **Manage Invoice** options to create invoices, filter and search invoices, archive and unarchive invoices, and download invoice activity. From this page, you can open **Invoice Settings**, **Create an invoice**, or the **Request Money** page.

About Invoice Statuses

Each invoice is assigned a status based on where it is in the invoicing process. A status appears for each invoice listed in your **History** and **Manage Invoices** pages. At a quick glance, you can determine whether an invoice is paid. You can review the details for all invoices regardless of invoice status.

The available invoice statuses are listed below in alphabetical order.

Status	Description
Canceled	Invoice was canceled.
Draft	Invoice was created and saved. It was not sent to the recipient.
Marked as paid	Invoice was manually marked as paid.
Paid	Invoice was paid by a PayPal account holder.
Sent	Invoice was sent.

Depending on an invoice's status, you can perform certain actions on an invoice. For example, you can print all invoices, but you can only edit invoices that have not been paid, marked as paid, or canceled. Some actions can be performed either on the **Manage Invoices** or **Invoice details** pages. Other actions can only be performed on the Invoice details page.

You can perform the following actions on the **Manage Invoices** page:

- **Send a Reminder:** Only available when invoice status is **Sent**.
- **Mark as Paid:** Only available when invoice status is **Sent**.
- **Cancel the invoice:** Only available when invoice status is **Sent**.
- **Copy the invoice:** Available for all invoice statuses.

You can perform all of these actions and the following actions on the **Invoice details** page:

- **Edit the invoice:** Only available when the invoice status is **Draft** or **Sent**.
- **Print the invoice:** Available for all invoice statuses.

See "[Reviewing Invoice Details](#)" on page 42 for instructions on using the **Invoice details** page.

Searching Invoices

The **Manage Invoices** page contains two search filters: **Basic** and **Advanced**. Use these search filters to find invoices that match certain criteria. For example, if you want to see all invoices that are past due, you can use the **Past due** filter in **Basic filter** to quickly find them. If you want to see all invoices sent to a particular recipient, you can search by email address in **Advance filter**.

When you open the **Manage Invoices** page, the **Basic filter** selections and **All Active** invoices display in the page. As you apply search filters, the invoice list changes to display invoices that match your filter.

About the Basic Filters

Basic filter contains predefined filters for some of the most common searches you might need.

Filter	Results
All active	All invoices that have not been archived.
Unsent	Saved invoices. The invoice status is Draft .
Unpaid	Sent invoices that have not been paid. The invoice status is Sent .
Paid	Paid invoices. The invoice status is either Paid or Marked as paid .
Past due	Sent invoices that are past their due dates.

With one click, **Basic filter** displays the invoices that match the search criteria.

If you need to narrow down the list of invoices more than **Basic filter** allows, use **Advanced filter** instead.

About the Advanced Filters

Use **Advanced filter** to filter your searches by almost every top-level invoice value. Advanced filters are useful when you need to search for specific invoice data.

You can apply the following filters.

Filter	Search Criteria
Email	Enter all or part of the recipient's email address.
Recipient name	Enter all or part of the recipient's first and last name.
Company name	Enter all or part of the recipient's company name.
Invoice number	Enter all or part of the invoice number.
Status	Select an invoice status.
Archived items	No additional criteria. See " Archiving and Unarchiving Invoices " on page 58 for information about archived invoices.
Amount	Enter an amount range in the two boxes that display.
Currency	Select a currency.
Memo	Enter memo text or keywords that might appear in invoice memos. For example, if you typically include a memo about special discounts, search for <code>discount</code> .

Filter	Search Criteria
Payment date	Specify the payment date range. Enter the From and To dates of the date range in the text boxes or use the Calendar controls to select them.
Due date	Specify the due date range. Enter the From and To dates of the date range in the text boxes or use the Calendar controls to select them.
Invoice date	Specify the invoice date range. Enter the From and To dates of the date range in the text boxes or use the Calendar controls to select them.

For most of the text filters, partial text can match. For example, the text `mit` matches `Smith` and `Mitty`.

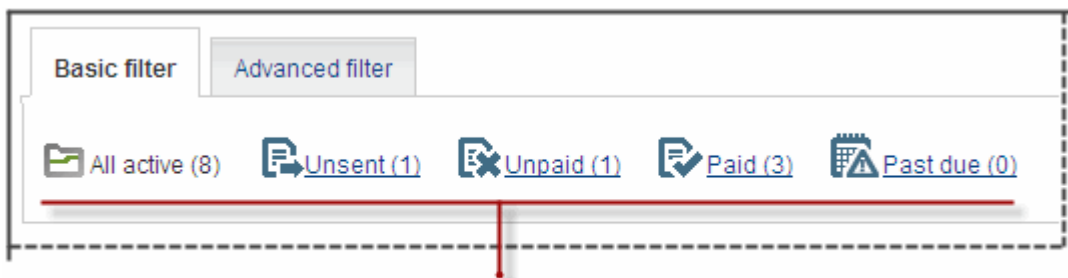
Searching Invoices with a Basic Filter

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click the **Manage Invoices** subtab.

The **Manage invoices** page opens.

3. Click a filter in the **Basic filter** box.

- **All Active**
- **Unsent**
- **Unpaid**
- **Paid**
- **Past due**



Select a filter to start a basic search.

See [“About the Basic Filters” on page 39](#) for a description of these filters.

The **Manage Invoices** page refreshes and displays the invoices matching the search filter. You can apply another filter or look at the invoice details for one or more of the invoices listed.

Searching Invoices with an Advanced Filter

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click the **Manage Invoices** subtab.
The **Manage invoices** page opens.
3. Click **Advanced filter**.
The **Advanced filter** search box displays on the page. The **Basic filter** search box moves to the back.
4. Select a filter in **Filter by**.
 - **Email**
 - **Recipient name**
 - **Company name**
 - **Invoice number**
 - **Status**
 - **Archived items**
 - **Amount**
 - **Currency**
 - **Memo**

If the filter lets you enter search criteria, one or more fields display next to your **Filter by** selection.

See [“About the Advanced Filters” on page 39](#) for a description of these filters.
5. Enter search criteria for your filter, if available.
 - For **Status** and **Currency** filters, select an item from the drop down list.
 - For other filters, enter the criteria to find.
6. To use a date range to filter the search, select a date type from **And** (below the **Filter by** field) and enter a date range.
 - Select a date from the **Calendar** control.
 - Or -
Enter the starting date in the first date field.
 - Select a date from the **Calendar** control.
 - Or -
Enter a date in the **to** field (second date field).

Select a filter to search invoices.

Enter a value if available for the filter you selected .

Basic filter Advanced filter

Filter by Email jsmythe

And Invoice date 7/1/2010 to 7/21/2010 Show

Specify the beginning and ending dates of the date range for an advanced search.

7. Click **Show**.

The **Manage Invoices** page displays a list of invoices that match your criteria. If there are no matches, the page displays a message indicating that there are no matches.

Reviewing Invoice Details

The **Manage Invoices** page lists the invoices that you sent or saved. Invoices also appear in your **History** page. You can view detailed information for an invoice in the **Invoice details** page.

You can access the **Invoice details** page from the following pages:

- **Manage Invoices**
- **Account Overview** for recent invoices
- **History**
- Any page that contains an invoice number link

The **Invoice details** page is divided into three sections:

1. **Invoice status:** Contains the recipient's email address, current status, and invoice memo text display at the top of the page.
2. **Invoice actions:** A set of buttons for the actions you can perform for the current invoice and a link you can use to return to the previous page.
3. **Invoice:** Displays the invoice as it appears to the recipient. This section shows your contact information, the invoice date and payment terms, the recipient's information, the items invoiced, and the invoice totals. If you included **Terms and Conditions** or **Notes** text, it appears below the item list.

Use the **Invoice details** page to review the contents of the invoice, recipient information, and the invoice terms. From this page, you can perform the following actions for open invoices.

- **Edit:** Update or change the invoice contents. For example, if the recipient moved, you can edit the address information.
See [“Editing Invoices” on page 47](#) for instructions.
- **Remind:** Send an email reminder to the recipient.
See [“Sending Invoice Reminders” on page 55](#) for instructions.
- **Print:** Print the invoice for your records or to send a copy to your customer.
See [“Printing Invoices” on page 32](#) for instructions.
- **Mark as Paid:** Manually set the invoice to **Paid**.
See [“Recording Invoice Payments” on page 65](#) for instructions.
- **Copy:** Use a copy of the invoice as the starting point for a new invoice.
See [“Copying Invoices” on page 54](#) for instructions.
- **Cancel Invoice:** Mark the invoice as canceled and send an email notification to the recipient.
See [“Canceling Invoices” on page 56](#) for instructions.

After an invoice is paid or canceled, you can only print or copy it.

Invoice details

Invoice sent to: [Nick Michael \(pgrisier-us-01@paypal.com\)](mailto:Nick Michael (pgrisier-us-01@paypal.com))
 Status: Sent on Jul 20, 2010
 Memo: Special tax in shipping

[Edit](#) [Remind](#) [Print](#) [Mark as Paid](#) [Copy](#) [Cancel Invoice](#)

[Go to Manage Invoices](#)

INVOICE

<p>Maya Twain 491 9th Street Austin, TX 78701 United States Phone: Don't show on invoice pgrisier-us-02@paypal.com</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="background-color: #e1eef6;">Invoice number</td> <td>0008</td> </tr> <tr> <td style="background-color: #e1eef6;">Invoice date</td> <td>7/20/2010</td> </tr> <tr> <td style="background-color: #e1eef6;">Payment terms</td> <td>Due on receipt</td> </tr> <tr> <td style="background-color: #e1eef6;">Due date</td> <td>7/20/2010</td> </tr> </table>	Invoice number	0008	Invoice date	7/20/2010	Payment terms	Due on receipt	Due date	7/20/2010
Invoice number	0008								
Invoice date	7/20/2010								
Payment terms	Due on receipt								
Due date	7/20/2010								

Bill To
 pgrisier-us-01@paypal.com

Description	Quantity	Unit price	Amount
Shirt - 12345 - White Logo T-Shirt	1	\$20.00	\$20.00
Hat - 23456 - Black Hat with small logo	1	\$25.00	\$25.00
Keychain - 98765	1	\$8.00	\$8.00
		Subtotal	\$53.00
		Shipping/handling	\$4.95
		CA 8.25%	\$4.78
		Total	\$62.73 USD

Opening Invoice Details From the Manage Invoice Page

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click the **Manage Invoices** subtab.
The **Manage invoices** page opens.
3. Click the invoice number in the **Invoice #** column to open that invoice.
The **Invoice details** page opens.

Invoice details

Invoice sent to: [Nick Michael \(pgrisier-us-01@paypal.com\)](mailto:Nick Michael (pgrisier-us-01@paypal.com))

Status: Sent on Jul 20, 2010

Memo: Special tax in shipping

[Go to Manage Invoices](#)

INVOICE

Maya Twain
491 9th Street
Austin, TX 78701
United States
Phone: Don't show on invoice
pgrisier-us-02@paypal.com

Invoice number	0008
Invoice date	7/20/2010
Payment terms	Due on receipt
Due date	7/20/2010

Bill To
pgrisier-us-01@paypal.com

Description	Quantity	Unit price	Amount
Shirt - 12345 - White Logo T-Shirt	1	\$20.00	\$20.00
Hat - 23456 - Black Hat with small logo	1	\$25.00	\$25.00
Keychain - 98765	1	\$8.00	\$8.00
		Subtotal	\$53.00
		Shipping/handling	\$4.95
		CA 8.25%	\$4.78
		Total	\$62.73 USD

4. Click a button to perform an action on this invoice.

For example, click **Print** to make a copy of the invoice for your records.

- Or -

Click **Go to Manage Invoices** to return to the **Manage Invoices** page.

Editing Invoices

You can update or change invoices that have not been paid, marked as paid, or canceled. For example, if your customer ordered another item, you can add it to an existing invoice. Use the **Invoice details** page to edit the contents of the invoice, recipient information, and the invoice terms.

When you select an invoice to edit, the **Edit invoice** page opens and displays the information that was sent to your customer. You can edit any of the fields in the invoice, but you cannot use a different template for the invoice. Because you are editing an existing invoice, you can only **Send**, **Print**, or **Close** the invoice.

When you send an edited invoice, the **Manage Invoices** page displays information about the edited invoice, replacing the original entry for the invoice.

When your customer views the invoice details, the invoice **Status** displays a message indicating that the invoice was edited and the date it was edited. Your customer sees only the edited version of the invoice.

Editing an Invoice

NOTE: If you need more detailed information about completing invoice fields, see [“Creating Invoices and Entering Details” on page 17](#).

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click the **Manage Invoices** subtab.

The **Manage invoices** page opens.

3. Click an **Invoice #**.

The **Edit invoice** page opens.

4. Add or change the logo for the invoice.

Setting	Action
Add logo	Click to add a logo. This setting appears when the invoice does not have a logo.
Change logo	Click to use a different logo. This setting appears when the invoice contains a logo.
Remove logo	Click to delete the logo. This setting appears when the invoice contains a logo.

See [“Including a Logo in Your Invoices” on page 74](#) for detailed instructions.

5. Click **Edit contact information** to change your information.

See [“Editing Your Contact Information in an Invoice” on page 70](#) for instructions.

6. Update the recipient information in **Send to**.

7. Update the following **Invoice information**:

- **Invoice number**
- **Invoice date**
- **Payment terms**
- **Due date**

8. To change the currency, select one in **Select currency**.

9. Edit or add items.

Setting	Action
Item name/ID	Enter the item name. If you have saved items, select one from the list that appears when you click in the field.
Date	Enter the Date for the item. When you tab or click in the date field, a Calendar opens. Select the date from the Calendar or type the date in the field.
Quantity	Enter the number of items.
Unit price	Enter the unit price. If you selected a saved item, the stored amount displays. You can change it, if necessary.
Tax	Select the tax for this item. If you selected a saved item with an assigned tax rate, the tax displays. You can change it, if necessary. If the correct tax rate is not listed, add a new tax. See “Adding Tax Information in an Invoice or Template” on page 128 for instructions.

10. Edit or add shipping and discount information:

Setting	Action
Discount	Enter a number and select a discount type.
Shipping/handling	Enter an amount.
Tax on shipping	Select the tax to apply to the shipping or handling fee. If the correct tax rate is not listed, add a new tax. See “Adding Tax Information in an Invoice or Template” on page 128 for instructions.

11. Edit or add invoice notes and text:

- Enter **Terms and conditions** text, up to 1,000 characters. This text appears on an invoice.
- Enter **Note to recipient** text, up to 1,000 characters. This text appears on an invoice.
- Enter **Memo** text, up to 150 characters. This text does not appear on an invoice.

12. Click **Send**.

The **Manage invoices** page opens and displays a message verifying that your editing invoice was sent. The edited invoice’s information appears in the invoice list.

Before sending the edited invoice, you can click **Print** to make a copy for your records or mail to your customer.

Exporting Invoice Information

You can export invoice information to use in a spreadsheet or other application by downloading invoice activity from the **Manage Invoices** page. You can open the activity file immediately or save file to use later.

Each invoice in the activity file generates one row of information. Each column in the activity file represents a piece of the invoice’s information,. If an invoice does not contain certain data, such as tax or shipping amounts, the columns are empty.

Before downloading the activity, use a basic or advanced filter to display only the invoices you want in the file. For example, use a filter to limit the downloaded activity to paid invoices. See [“Searching Invoices”](#) on page 38 for filtering instructions.

You can download two levels of invoice activity information:

- **Invoice Summary:** The downloaded activity information contains one row of information for each invoice. This is the default download.
See [“Invoice Summary Activity Information”](#) on page 50 for a list of the columns contained in each row.
- **Invoice Details:** The downloaded activity information contains one invoice summary row and additional rows for each item, tax, shipping, and discount within an invoice. The summary row contains the same information as the Invoice Summary download.

Additional columns appear for item details, tax amounts, shipping amounts and discount amounts.

See “[Invoice Details Activity Information](#)” on page 50 for more information about the columns contained in this download.

Invoice Summary Activity Information

The default download contains invoice summary information. Each row can contain the information in the following table.

Date created	Time created	Invoice date	Invoice date	Due date
Payment date	Status	From email	To email	Name
Company	Invoice number	Currency	Item total	Discount amount
Shipping amount	Tax total	Total invoice amount	Transaction ID	Terms note
Customer note	Invoice memo	Invoice billing address	Other recipient details	Invoice shipping address

Invoice Details Activity Information

You can download item details for each invoice to see a breakdown of the invoice’s contents. In addition to the invoice summary information, you’ll see one item detail row for each invoice item. If the invoice contains shipping charges or discounts, there is one row for each. A **Type** column identifies the kind of data included in the row:

- **Invoice summary row:** Contains all of the information listed in the previous table.
- **Invoice item row:** Contains the invoice identification fields and the following item-specific columns:
 - Item date
 - Item name
 - Item description
 - Item quantity
 - Item unit price
 - Item total
 - Tax name
 - Tax rate
- **Shipping amount row:** Displays invoice identification information and contains information in the following columns:
 - Shipping amount
 - Tax name
 - Tax rate

– Tax total

- **Discount amount row:** Displays invoice identification information and an amount in the Discount amount column.

The following table contains a complete list of the columns in the invoice details activity.

Date created	Time created	Invoice date	Due date
Payment date	Type	Status	From email
To email	Name	Company	Invoice number
Currency	Item date	Item name	Item description
Item quantity	Item unit price	Item total	Discount amount
Shipping amount	Tax name	Tax rate	Tax total
Total invoice amount	Transaction ID	Terms note	Customer note
Invoice memo	Invoice billing address	Other recipient details	Invoice shipping address

Downloading and Saving Invoice Activity

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click the **Manage Invoices** subtab.
The **Manage invoices** page opens.
3. Search for the invoices to export by applying a Basic or Advanced filter.
See “[Searching Invoices](#)” on page 38 for instructions.

The screenshot shows the 'Manage invoices' interface. At the top, there are buttons for 'Request Money' and 'Create an Invoice'. Below these are filter tabs for 'Basic filter' and 'Advanced filter'. A status bar shows 'All active (4)', 'Unsent (1)', 'Unpaid (0)', 'Paid (2)', and 'Past due (0)'. A 'Results: 4 invoices found' message is displayed. A 'Download: CSV' link is highlighted with a red arrow. Below the download link is a table of invoices with columns for Invoice date, Due date, Recipient, Status, Invoice #, Action, Amount, and Memo. The table contains four rows of invoice data.

<input type="checkbox"/>	Invoice date	Due date	Recipient	Status	Invoice #	Action	Amount	Memo
<input type="checkbox"/>	Jun 28, 2010	Jun 28, 2010	ABC Corp	Paid	0004	<input type="button" value="Copy"/>	\$24.90 USD	
<input type="checkbox"/>	Jun 28, 2010	Jun 28, 2010	ABC Corp	Marked as paid	0003	<input type="button" value="Copy"/>	\$63.12 USD	
<input type="checkbox"/>	Jun 28, 2010	Jun 28, 2010	ABC Corp	Draft	0002	<input type="button" value="Copy"/>	\$26.90 USD	
<input type="checkbox"/>	Jun 28, 2010	Jun 28, 2010	ABC Corp	Canceled	0001	<input type="button" value="Copy"/>	\$49.95 USD	

- Click **CSV** above the invoice list.

The **Download your activity** dialog box opens.

- Select a type in **Choose the file type**.

The file type specifies how you want the activity data separated in each row. For example, select **Comma delimited** to use a comma to separate the columns.

- Click **Include Item Details** to export detailed information about each item in the invoice.

- Click **Download**.

The **File Download** dialog box opens.

- Click **Save**.

The **Save File** dialog box opens.

- Enter a name in **File name**.

- Click **Save**.

NOTE: To save the file in a different folder, browse to find the folder to use before clicking **Save**.

The **Manage Invoices** page opens.

Downloading and Opening Invoice Activity

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click the **Manage Invoices** subtab.
The **Manage invoices** page opens.
3. Search for the invoices to export by applying a Basic or Advanced filter.
See “[Searching Invoices](#)” on page 38 for instructions.

Manage invoices

Request Money Create an Invoice

Basic filter Advanced filter

All active (4) Unsent (1) Unpaid (0) Paid (2) Past due (0)

Results: 4 invoices found Download: [CSV](#)

20 items per page Page 1 of 1 Previous Next

Archive What's this?

<input type="checkbox"/>	Invoice date	Due date	Recipient	Status	Invoice #	Action	Amount	Memo
<input type="checkbox"/>	Jun 28, 2010	Jun 28, 2010	ABC Corp	Paid	0004	Copy	\$24.90 USD	
<input type="checkbox"/>	Jun 28, 2010	Jun 28, 2010	ABC Corp	Marked as paid	0003	Copy	\$63.12 USD	
<input type="checkbox"/>	Jun 28, 2010	Jun 28, 2010	ABC Corp	Draft	0002	Copy	\$26.90 USD	
<input type="checkbox"/>	Jun 28, 2010	Jun 28, 2010	ABC Corp	Canceled	0001	Copy	\$49.95 USD	

Archive What's this?

4. Click **CSV** above the invoice list.
The **Download your activity** dialog box opens.
5. Select a type in **Choose the file type**.
The file type specifies how you want the activity data separated in each row. For example, select **Comma delimited** to use a comma to separate the columns.
6. Click **Include Item Details** to export detailed information about each item in the invoice.
7. Click **Download**.
The **File Download** dialog box opens.
8. Click **Open** to display the information in an application.
Your selected application opens. Follow the directions to convert the information to your application’s format, if necessary.

Copying Invoices

You can copy an existing invoice as a quick way to create a new invoice. When you copy an invoice, the **Create a new invoice page** opens and displays an exact replica of the original invoice except for the invoice number, invoice date, and due date. These three fields are reset. You can make any necessary edits before sending the invoice.

You can copy an invoice from the **Manage Invoices** page or from the **Invoice details** page.

Copying an Invoice from the Manage Invoices Page

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click the **Manage Invoices** subtab.

The **Manage invoices** page opens.

3. Click **Copy** in the **Action** column for the invoice you want to copy.

The **Create a new invoice** page opens.

4. Edit or add information to an invoice copy as you would with any other new invoice.

When you are finished, you can send, preview, or save the invoice. You can also save the invoice as a template.

See [“Creating Invoices” on page 15](#) for instructions.

Copying an Invoice from the Invoice Details Page

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click the **Manage Invoices** subtab.

The **Manage invoices** page opens.

3. Click the **Invoice #**.

The **Invoice details** page opens.

4. Click **Copy**.

The **Create a new invoice** page opens.

5. Edit or add information to the invoice copy as you would with any other new invoice.

When you are finished, you can send, preview, or save the invoice. You can also save the invoice as a template.

See [“Creating Invoices” on page 15](#) for instructions.

Sending Invoice Reminders

If you have not received payment for your invoice, you can send a reminder that payment is due. You can send invoice reminders for open invoices through the **Manage Invoices** page.

The reminder is an email message that you send to the invoice recipient. The email subject contains the invoice number to help identify the invoice. You can include a personal message of up to 1,000 characters. You can send a copy of the email to yourself for your records.

Sending a Reminder

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click the **Manage Invoices** subtab.

The **Manage invoices** page opens.

3. Select **Remind** in the **Action** column for the invoice that needs a reminder.


The **Reminder page** opens. The invoice recipient's email displays in **To:** and the subject line contains the invoice number.

4. Select **Send me a copy of the email**. (Optional)
5. Edit the **Subject** text, if necessary.

This is the email subject.

6. Enter a **Note** to the invoice recipient. (Optional)

Note text cannot exceed 1,000 characters. It appears in the body of the email message.

Reminder Secure 

We'll send this email to remind your recipient that payment is due for this invoice. You can add a subject line and a personal note to the email.

To: mbrown@abc.com

Send me a copy of the email

Subject:

Note:

Characters: 956

7. Click **Send Reminder**.

The **Manage Invoices** page displays a message confirming that your reminder was sent. If you chose to receive a copy of the email, it will arrive in your email shortly.

Canceling Invoices

When a recipient cancels an order or you decide not to pursue an invoice for some reason, you can cancel it through the **Invoice details** page. You can also cancel an invoice using an option in the **Manage Invoices** page.

When you cancel an invoice, the invoice recipient receives an email notification. The default email subject line contains the invoice number to help identify the invoice. You can include a personal message of up to 1,000 characters. You can send a copy of the email to yourself for your records.

The invoice status changes to **Canceled**. This invoice status displays in the **History** list in the **Payment Status** column and in the **Manage Invoices** page in the **Status** column. The **Invoice details** page displays the status, the date the status occurred, and the user who set the status.

You can still access **Invoice details** for canceled invoices through the **Manage Payment** or **History** pages. You can also print or copy them. However, canceled invoices are considered complete and you cannot edit them.

Canceling an Invoice from the Manage Invoices Page

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click the **Manage Invoices** subtab.

The **Manage invoices** page opens.

3. Select **Cancel** in the **Action** column for the invoice you want to copy.


The **Cancel this invoice and email the recipient** page opens. The recipient's email displays in **To:** and the default subject line contains the invoice number.

4. Edit the **Subject** text, if necessary.

This text becomes the email subject.

5. Enter a **Note** to the recipient. (Optional)

Note text cannot exceed 1,000 characters. It appears in the body of the email message.

Cancel this invoice and email the recipient Secure 

We'll send an email to let your recipient know that you've canceled the invoice. You can add a subject line and a personal note to the email before sending.

To

Send me a copy of the email

Subject

Note

Characters: 1000

6. Click **Send Cancellation**.

The **Manage Invoices** page displays a message confirming that the invoice was canceled and an email was sent to the recipient. The invoice's **Status** displays **Canceled**.

If you chose to receive a copy of the email, it will arrive in your email shortly.

Canceling an Invoice from the Invoice Details Page

1. Log in to your PayPal account.
2. Open the **Invoice Details** page using one of the following methods:
 - In your **Account Overview** page, click **Details** for a canceled invoice.
 - Click **History**. The **History** page opens.
Locate a canceled invoice. Click **Details**.
 - Click **Request Payment**. The **Manage Invoices** page opens.
Click the **Invoice #** for a canceled invoice.

The **Invoice details** page opens. **Invoice sent to** displays the recipient's email address and **Status** displays the status, date the status occurred, and who set the status.

3. Click **Cancel Invoice**.


The **Cancel this invoice and email the recipient** page opens. The recipient's email displays in **To:** and the default subject line contains the invoice number.

4. Edit the **Subject** text, if necessary.

This text becomes the email subject.

5. Enter a **Note** to the recipient. (Optional)

Note text cannot exceed 1,000 characters. It appears in the body of the email message.

Cancel this invoice and email the recipient Secure 

We'll send an email to let your recipient know that you've canceled the invoice. You can add a subject line and a personal note to the email before sending.

To: mbrown@abc.com

Send me a copy of the email

Subject:

Note:

Characters: 1000

6. Click **Send Cancellation**.

The **Invoice details** page displays a message confirming that the invoice was canceled and an email was sent to the recipient. If you chose to receive a copy of the email, it will arrive in your email shortly.

7. Click **Go to log** or **Go to Manage Invoices** to return to your starting page.

Archiving and Unarchiving Invoices

All invoices that you create appear in the **All Active** invoices list. You can store, or *archive*, invoices that you are not actively using. When you archive invoices, they no longer appear in the **All Active** invoices list in the **Manage Invoices** page. You can see your archived invoices by using an **Advanced Filter** to search for them.

If you want archived invoices to appear in the **All Active** invoices list again, you can unarchive them. See [“Unarchiving an Invoice” on page 59](#).

Archiving an Invoice

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click the **Manage Invoices** subtab.

The **Manage invoices** page opens.

- Click the selection box next to each invoice to archive. To select all displayed invoices, click the section box at the top of the column.

Each selected invoice is highlighted.

The screenshot shows a table with the following data:

	Invoice date	Due date	Recipient	Status
<input type="checkbox"/>	Jul 20, 2010	Jul 20, 2010	pgrisier-us-01@paypal.com	Paid
<input type="checkbox"/>	Jul 20, 2010	Jul 20, 2010	Mary Brown	Canceled
<input checked="" type="checkbox"/>	Jul 20, 2010	Jul 20, 2010	ABC Corp	Canceled
<input checked="" type="checkbox"/>	Jul 14, 2010	Jul 14, 2010	--	Draft
<input type="checkbox"/>	Jun 28, 2010	Jun 28, 2010	ABC Corp	Marked as paid
<input checked="" type="checkbox"/>	Jun 28, 2010	Jun 28, 2010	ABC Corp	Canceled

Callout 1 points to the selection checkboxes in the first column. Callout 2 points to the 'Archive' buttons at the top and bottom of the table.

1 Select one or more invoices to archive.

2 Click **Archive**.

- Click **Archive**.

The **Manage Invoices** page displays only the active invoices. You can search for your archived invoices using an **Advanced filter**.

Unarchiving an Invoice

- Log in to your PayPal account.
- Click the **Request Money** tab and then click the **Manage Invoices** subtab.

The **Manage invoices** page opens.

- Click **Advanced Filter**.

The **Advanced Filter** settings display.

4. Select **Archived Items** in **Filter by**.
5. Enter a date range for **Invoice date**, **Due date**, or **Payment date** to further filter your search.
6. Click **Show**.

A list of archived invoices meeting your search criteria displays in the page.

Basic filter Advanced filter

1 Filter by Archived items

And Invoice date to

Results: 3 invoices found

20 items per page

To see previous invoices, please [go to the History page](#).

3 Unarchive [What's this?](#)

<input type="checkbox"/>	Invoice date	Due date	Recipient	Status	Invoice #
<input type="checkbox"/>	Jul 20, 2010	Jul 20, 2010	ABC Corp	Canceled	0002
<input checked="" type="checkbox"/>	Jul 14, 2010	Jul 14, 2010	--	Draft	0007
<input type="checkbox"/>	Jun 28, 2010	Jun 28, 2010	ABC Corp	Canceled	0001

3 Unarchive [What's this?](#)

20 items per page

1 Search for **Archived items** in **Advanced filter** 2 Select one or more archived invoices. 3 Click **Unarchive**.

7. Click the selection box for the invoices to unarchive. To select all displayed invoices, click the selection box at the top of the column.
8. Click **Unarchive**.

The search results list refreshes and the unarchived invoice no longer appears. The unarchived invoice appears in the **All Active** invoice list.

About Invoices and Shipping

The ability to create shipping labels and packing slips for your orders is not integrated in PayPal invoicing. However, when you receive a PayPal payment for an invoice, you can print shipping labels and packing slips by opening the payment's **Transaction Details** page and using the links listed there.

4

Managing Invoice Payments

PayPal Invoicing automatically records payments made through PayPal accounts. You can manually record payments made by invoice recipients without PayPal accounts or by PayPal account holders who choose to use a different payment method.

Read the following topics to learn about payments:

- “About Invoice Payments” on page 63
- “Viewing PayPal Invoice Payments” on page 63
- “Recording Invoice Payments” on page 65

See “Managing Your Invoices” on page 35 for instructions on managing other invoicing tasks.

About Invoice Payments

Paid invoices have different statuses to distinguish between PayPal payments and manually recorded payments.

- **Paid:** Identifies an invoice paid using PayPal
- **Marked as paid:** Identifies an invoice with a manually recorded payment.

Regardless of how payments are recorded, you can view and manage payments in the **Invoice details** page. You can access **Invoice details** from the following pages:

- **Manage Invoices:** Click an invoice number in the list.
- **Account Overview:** Click **Details for invoices created within the last 7 days**.
- **History:** Click **Details**.
- **Transaction Details:** Click the invoice number in **Payment For**.

The **Invoice details** page provides a link to the payment information for the invoice. Use this link to see more information about the payment and to perform different actions.

Viewing PayPal Invoice Payments

Invoice recipients who are PayPal account holders can choose to pay your invoices using their accounts. When they access their PayPal accounts, they see your invoices listed in their **Account Overview** or **History** pages. When they click **Pay**, they choose a payment method and approve the payment.

When an invoice payment clears, the invoice status changes to **Paid**. The **Invoice details** page shows the changed status and provides a link to the **Transaction Details** page for that

payment. Use this link to see more information about the payment, issue a refund, manage tracking information, or print a shipping label or packing slip.

Viewing a PayPal Invoice Payment

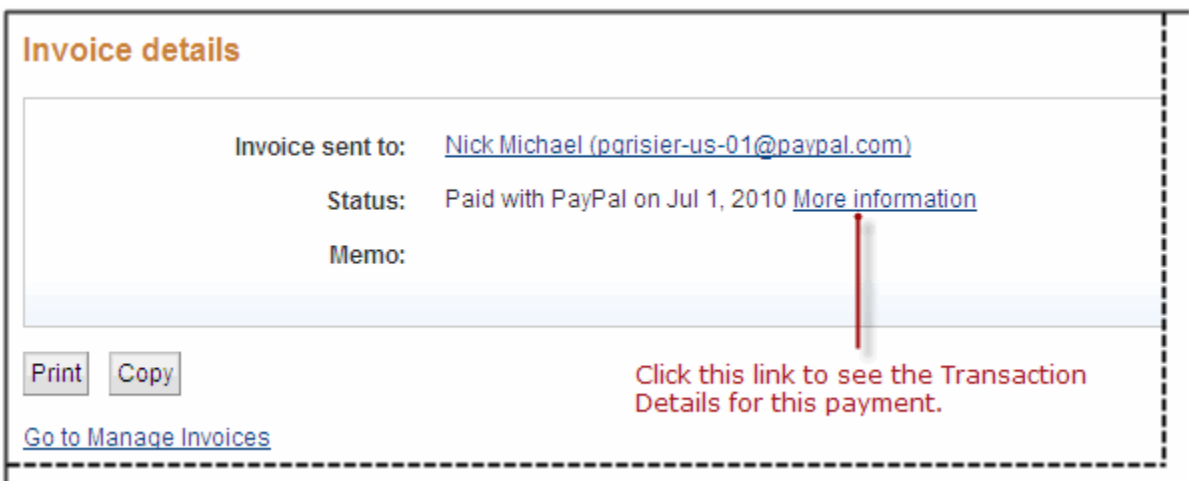
1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click the **Manage Invoices** subtab.

The **Manage invoices** page opens.

3. Click the invoice number in the **Invoice #** column to open that invoice.

The **Invoice details** page opens.

4. Click **More information**.



The **Transaction Details** page opens. It displays the payment details.

5. Perform one of the following actions, if necessary.
 - Issue a refund within 60 days of the payment.
 - Enter tracking information for the item(s) you shipped.
 - Print a shipping label or packing slip for the item(s) you will ship.
 - Edit tracking information.
6. Click the invoice number in **Payment for** to return to the **Invoice details** page.
 - Or -
 - Click **Return to Log** to open your **History** page.

Recording Invoice Payments

Invoice recipients do not need a PayPal account to pay your invoices. They can pay online using a debit or credit card, or pay offline by mailing payments or making wire transfers. When recipients use a method other than PayPal to pay an invoice, PayPal cannot update the invoice status for you. You must manually record the payment information and mark the invoice as paid. You record an invoice payment using an option on the **Manage Invoices** page.

When you enter and save the payment information, the invoice displays the **Marked as paid** status on the **Manage Invoices**, **Account Overview**, and **History** pages. When you view the **Invoice details** page for the invoice, it contains a link to the **Mark as paid** dialog box. Use this link to view or edit payment information for this invoice.

Marking an Invoice as Paid

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click the **Manage Invoices** subtab.

The **Manage invoices** page opens.

3. Select **Mark as paid** in the **Action** column.

The **Mark as paid** dialog opens. It displays the invoice number, invoice date, and the invoice amount for the invoice you selected.

Mark as paid

Complete the following information to record the payments you've received.

Invoice #: 0003 Invoice date: 6/28/2010

Invoice amount: \$63.12 USD

Payment method
Bank transfer

Payment date
6/28/2010

Note
Characters: 300

Save Cancel

4. Select a **Payment method**.
5. Enter a **Payment date** or select one from the **Calendar**.
6. Enter an optional **Note** of 300 characters or less.
7. Click **Save**.

The **Manage Invoices** page displays the **Marked as paid** status for the invoice.

Viewing and Editing Manually Recorded Payments

NOTE: This task describes how to access the **Invoice details** page from the **Manage Invoices** page. You can also access the **Invoice details** page from the **Account Overview** and **History** pages, as well as any page that contains an invoice number link.

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click the **Manage Invoices** subtab.

The **Manage invoices** page opens.

3. Click the invoice number in the **Invoice #** column to open that invoice.

The **Invoice details** page opens.

4. Click **View/edit details**.

Invoice details

Invoice sent to: [Nick Michael \(pgrisier-us-01@paypal.com\)](#)

Status: Marked as paid on Jul 20, 2010 [View/edit details](#)

Memo:

[Go to Manage Invoices](#)

Click this link to see the payment information for this invoice.

The **Mark as paid** dialog box opens. It displays the invoice number, invoice date, the invoice amount, and the saved payment information for this invoice.

Mark as paid

To update your payment details, enter the new information, then click **Save Changes**.

Invoice #: 0005 Invoice date: 7/8/2010

Invoice amount: \$23.90 USD

Payment method

Payment date

Note

Characters: 300

5. Update the payment information for the invoice.

6. Click Save Changes.

The **Mark as paid** dialog box closes. You can continue to review the **Invoice details** page or perform other actions.

7. Click Go to Manage Invoices.

The **Invoice details** page closes and the **Manage Invoices** page opens.

5

Customizing Your Invoice Information

You can customize what appears on your invoices by editing your contact information or including a logo.

Read the following topics to learn about customizing your invoices.

- [“About Invoice Customization” on page 69](#)
- [“Customizing Your Contact Information” on page 69](#)
- [“Including a Logo in Your Invoices” on page 74](#)
- [“Including a Logo on Your Payment Page” on page 79](#)

About Invoice Customization

Your contact information identifies you as the invoice sender and provides the recipient with a way to contact you, if necessary. When you create an invoice, the invoice contact information fields automatically display your **Profile** information. You can customize what appears on the invoice by editing your contact information.

Another way to customize your invoices is to include your logo. Sending invoices with your logo helps your recipients identify you as the sender.

Customizing Your Contact Information

Your contact information identifies you as the invoice sender and provides the recipient with a way to contact you if necessary. When you create an invoice, the invoice contact information fields automatically display your **Profile** information.

You can customize what appears on the invoice by editing your contact information. You can edit your contact information in two ways:

1. Edit your contact information in an invoice.
2. Edit the information in the **Enter your contact information** page in **Invoice Settings**.

Any edits you save do not affect existing invoices, invoice templates, or your **Account Profile**. You must edit your templates to change the contact information they contain. To change your **Account Profile** information, you must edit it directly.

NOTE: You must edit your address, phone number, and email address in your **Account Profile**.

See [“Managing Templates” on page 94](#) for instructions on editing your invoice templates.

Editing Your Contact Information in an Invoice

NOTE: Any changes you make to your invoice contact information will not affect the information stored in your **Account Profile**.

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click **Create Invoice**.

The **Create a new invoice** page opens.

3. Click **Edit contact information**.

The **Your contact information** page opens.

Your contact information

All the information on this page is optional. To edit your address, phone, or email, go to your PayPal profile.

Business name

First name

Last name

Address

Phone

Fax

Email

Website

Additional information
For example, your tax ID number

Save these changes to my Invoice Settings.

4. Add or edit your contact information.

NOTE: All information on this page is optional.

Setting	Action
Business Name	Enter the name of your business. This item is included in the invoice.
First Name	Enter your first or given name. When you first create an invoice, this information is accessed from your Account Profile . If you change and save it, the edited name will be used for all future invoices.
Last Name	Enter your last or family name. When you first create an invoice, this information is accessed from your Account Profile . If you change and save it, the edited name will be used for all future invoices.
Address	Select your address. Addresses are stored in your Account Profile . To exclude the address from the invoice, select Don't show on invoice .
Phone	Select your phone number. Phone numbers are stored in your Account Profile . To exclude the phone number from the invoice, select Don't show on invoice .
Fax	Enter your fax number. Enter the number as you want it to appear on the invoice, or leave it blank.
Email	Select your email address. Email addresses are stored in your Account Profile . To exclude the email address from the invoice, select Don't show on invoice .
Website	Enter your website address as you wish it to appear on your invoice, or leave it blank.
Additional Information	Enter additional contact information to display on the invoice. For example, enter your tax ID number or business license number.

5. To store this information, select **Save these changes to my Invoice Settings**,
6. Click **Save**.

Your edits appear in the contact information section of the invoice. If you chose to save the edits to your **Invoice Settings**, your updated contact information will also appear in the **Enter your contact information** page.

Editing Your Contact Information in Invoice Settings

NOTE: Any changes you make to your invoice contact information will not affect the information stored in your **Account Profile**.

1. Log in to your PayPal account.
2. Click the **Request Money** tab.

3. Click **Invoice Settings**.

The **Enter your contact information** page opens.

4. Add or edit your contact information.

NOTE: All information on this page is optional.

Enter your contact information

<div style="background-color: #f0f0f0; padding: 5px; margin-bottom: 5px;">Invoice Settings</div> <ul style="list-style-type: none"> <li style="padding: 5px 5px 5px 15px;">▶ Your contact information <li style="padding: 5px 5px 5px 15px;">▶ Invoice logo <li style="padding: 5px 5px 5px 15px;">▶ Payment logo <li style="padding: 5px 5px 5px 15px;">▶ Tax information <li style="padding: 5px 5px 5px 15px;">▶ Saved items <li style="padding: 5px 5px 5px 15px;">▶ Templates <li style="padding: 5px 5px 5px 15px;">▶ Address book 	<p>Enter the contact details that will appear on your invoices. You don't have to complete all the fields.</p> <p>To edit your address, phone, or email, go to your PayPal Profile.</p> <p>Business name <input type="text"/></p> <p>First name <input type="text" value="Maya"/></p> <p>Last name <input type="text" value="Twain"/></p> <p>Address <input type="text" value="491 9th Street, Austin, TX 78701, United States"/></p> <p>Phone <input type="text" value="Don't show on invoice"/></p> <p>Fax <input type="text"/></p> <p>Email <input type="text" value="pgrisier-us-02@paypal.com"/></p> <p>Website <input type="text"/></p> <p>Additional information For example, your tax ID number <input type="text"/></p> <p style="text-align: right;"><input type="button" value="Save"/></p>
---	--

Setting	Action
Business Name	Enter your business name as you want it to appear on an invoice.
First Name	Enter your first or given name. When you first create an invoice, this information is accessed from your Account Profile . If you change it, the edited name will be used for all future invoices.

Setting	Action
Last Name	Enter your last or family name. When you first create an invoice, this information is accessed from your Account Profile . If you change it, the edited name will be used for all future invoices.
Address	Select your address. Addresses are stored in your Account Profile . To exclude the address from the invoice, select Don't show on invoice .
Phone	Select your phone number. Phone numbers are stored in your Account Profile . To exclude the phone number from the invoice, select Don't show on invoice .
Fax	Enter your fax number. Enter the number as you want it to appear on the invoice, or leave it blank.
Email	Select your email address. Email addresses are stored in your Account Profile . To exclude the email address from the invoice, select Don't show on invoice .
Website	Enter your website address as you wish it to appear on your invoice, or leave it blank.
Additional Information	Enter additional contact information to display on the invoice. For example, enter your tax ID number or business license number.

5. Click **Save**.

Your updated contact information appears in the **Enter your contact information** page. When you create your next invoice, it will use the updated information.

Including a Logo in Your Invoices

Sending invoices with your logo helps your customers identify you as the sender.

Your invoice logo must meet the following requirements:

- **File format:** JPG, GIF, or PNG
- **File size limit:** 100KB, maximum
- **File resolution:** 75 pixels high x 100 pixels wide, maximum

If your image does not meet these requirements, adjust the image before you add it.

IMPORTANT: Before you add a logo to use in your invoices, you must certify that you have the right to distribute the image and that it does not violate the *PayPal User Agreement* and the *Acceptable Use* policies.

You can add or change an invoice logo when you create an invoice, or through the **Invoice Logo** page in **Invoice Settings**.

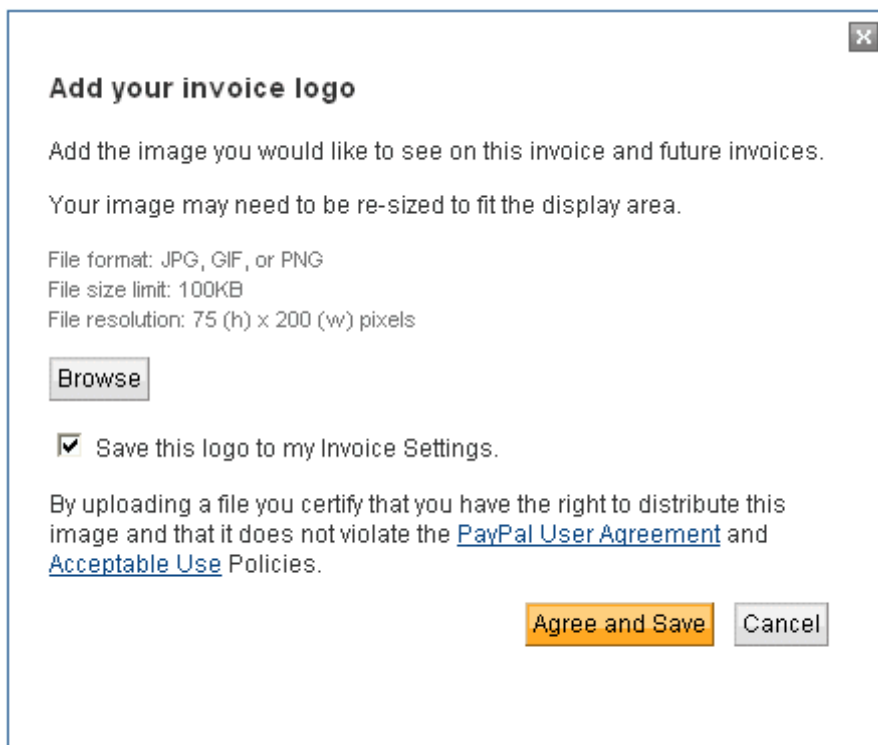
Adding a Logo When You Create an Invoice

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click **Create Invoice**.

The **Create a new invoice** page opens.

3. Click **Add Logo**.

The **Add your invoice logo** page opens.



The screenshot shows a dialog box titled "Add your invoice logo" with a close button in the top right corner. The text inside the dialog box reads: "Add the image you would like to see on this invoice and future invoices. Your image may need to be re-sized to fit the display area." Below this, it lists file specifications: "File format: JPG, GIF, or PNG", "File size limit: 100KB", and "File resolution: 75 (h) x 200 (w) pixels". There is a "Browse" button. Below the button is a checked checkbox labeled "Save this logo to my Invoice Settings." At the bottom, there is a disclaimer: "By uploading a file you certify that you have the right to distribute this image and that it does not violate the [PayPal User Agreement](#) and [Acceptable Use Policies](#)." At the bottom right, there are two buttons: "Agree and Save" (highlighted in orange) and "Cancel".

4. Click **Browse**.
The **Browse** dialog box opens.
5. Select the logo file to use and click **Open**.
6. Select **Save this logo to my Invoice Settings** to use this logo for all future invoices.
7. Click **Agree and Save**.

IMPORTANT: When you click **Agree and Save** you are certifying that you have the right to distribute the image and that it does not violate the *PayPal User Agreement* and the *Acceptable Use* policies.

The logo displays in the **Create a new invoice** page and is included with the invoice when you send or save it.

Adding a Logo in Invoice Settings

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click the **Manage Invoices** subtab.

The **Manage invoices** page opens.

3. Click **Invoice Settings**.

The **Enter your contact information** page opens.

4. Click **Invoice logo** in the **Invoice Settings** box at the left of the page.

The **Add your invoice logo** page opens. It displays a gray box as a placeholder for the logo and **No file selected** next to the **Browse** button.

Add your invoice logo

<div style="background-color: #f0f0f0; padding: 5px; margin-bottom: 5px;">Invoice Settings</div> <ul style="list-style-type: none"> <li style="padding: 5px 5px 5px 15px;">> Your contact information <li style="padding: 5px 5px 5px 15px;">▶ Invoice logo <li style="padding: 5px 5px 5px 15px;">> Payment logo <li style="padding: 5px 5px 5px 15px;">> Tax information <li style="padding: 5px 5px 5px 15px;">> Saved items <li style="padding: 5px 5px 5px 15px;">> Templates <li style="padding: 5px 5px 5px 15px;">> Address book 	<p>Add the image you'd like to use on your invoices.</p> <p>You may need to resize your image to fit the display area.</p> <p>File format: JPG, GIF, or PNG File size limit: 100KB File resolution: 75 (h) x 200 (w) pixels</p> <div style="background-color: #f0f0f0; height: 40px; width: 100%; display: flex; align-items: center; justify-content: center; margin: 10px 0;"> Logo Size </div> <p><input type="button" value="Browse"/> No file selected.</p> <p>By uploading a file you certify that you have the right to distribute this image and that it does not violate the PayPal User Agreement and Acceptable Use policies.</p> <p style="text-align: center;"><input type="button" value="Agree and Save"/></p>
---	--

5. Click **Browse**.
The Browse dialog box opens.
6. Select the logo file to use and click **Open**.
7. Click **Agree and Save**.

IMPORTANT: When you click **Agree and Save** you are certifying that you have the right to distribute the image and that it does not violate the *PayPal User Agreement* and the *Acceptable Use* policies.

The **Add your invoice logo** page replaces the gray box with your logo image and changes **No file selected** to the logo's file name. The logo is included in all future invoices unless you remove it.

Changing Your Invoice Logo

If you want to use a different logo image, upload a different file in the **Add your invoice logo** page in **Invoice Settings**. Uploading another logo does not change any existing invoices or templates that use the previous logo. To change the logo in your template, you must edit the template to read the new logo.

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click the **Manage Invoices** subtab.

The **Manage invoices** page opens.

3. Click **Invoice Settings**.

The **Enter your contact information** page opens.

4. Click **Invoice logo** in the **Invoice Settings** box at the left of the page.

The **Add your invoice logo** page opens. It displays the logo currently in **Invoice Settings**.

Add your invoice logo

<div style="background-color: #f0f0f0; padding: 2px; margin-bottom: 5px;">Invoice Settings</div> <ul style="list-style-type: none"> > Your contact information ▶ Invoice logo > Payment logo > Tax information > Saved items > Templates > Address book 	<p>Add the image you'd like to use on your invoices.</p> <p>You may need to resize your image to fit the display area.</p> <p>File format: JPG, GIF, or PNG File size limit: 100KB File resolution: 75 (h) x 200 (w) pixels</p> <div style="text-align: center; border: 2px solid purple; padding: 10px; width: fit-content; margin: 10px auto;"> <p>TWAIN GROUP</p> </div> <p><input type="button" value="Browse"/> mylogo.PNG</p> <p>By uploading a file you certify that you have the right to distribute this image and that it does not violate the PayPal User Agreement and Acceptable Use policies.</p> <p style="text-align: center;"> <input type="button" value="Agree and Save"/> <input type="button" value="Remove"/> </p>
--	---

5. Click **Browse**.

The **Browse** dialog box opens.

6. Select the logo file to use and click **Open**.
7. Click **Agree and Save**.

IMPORTANT: When you click **Agree and Save** you are certifying that you have the right to distribute the image and that it does not violate the *PayPal User Agreement* and the *Acceptable Use* policies.

The **Add your invoice logo** page replaces the old logo image with the new logo image and displays the new logo's file name next to the **Browse** button. The logo is included in all future invoices unless you remove it.

Deleting Your Invoice Logo

You can remove the logo in the **Add your invoice logo** page in Invoice Settings. Removing the logo will not change any existing invoices or templates. To remove a logo stored in a template, you must edit the template.

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click the **Manage Invoices** subtab.

The **Manage invoices** page opens.


3. Click **Invoice Settings**.

The **Enter your contact information** page opens.

4. Click **Invoice logo** in the **Invoice Settings** box at the left of the page.

The **Add your invoice logo** page opens.

Add your invoice logo

<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Invoice Settings </div> <ul style="list-style-type: none"> <li style="padding: 5px 5px 5px 15px;">> Your contact information <li style="padding: 5px 5px 5px 15px;">▶ Invoice logo <li style="padding: 5px 5px 5px 15px;">> Payment logo <li style="padding: 5px 5px 5px 15px;">> Tax information <li style="padding: 5px 5px 5px 15px;">> Saved items <li style="padding: 5px 5px 5px 15px;">> Templates <li style="padding: 5px 5px 5px 15px;">> Address book 	<p>Add the image you'd like to use on your invoices.</p> <p>You may need to resize your image to fit the display area.</p> <p>File format: JPG, GIF, or PNG File size limit: 100KB File resolution: 75 (h) x 200 (w) pixels</p> <div style="text-align: center; margin: 10px 0;">  </div> <p style="margin: 5px 0;"> <input type="button" value="Browse"/> mylogo.PNG </p> <p style="font-size: small; margin: 10px 0;"> By uploading a file you certify that you have the right to distribute this image and that it does not violate the PayPal User Agreement and Acceptable Use policies. </p> <p style="margin: 5px 0;"> <input type="button" value="Agree and Save"/> <input type="button" value="Remove"/> </p>
--	---

5. Click **Remove**.

The **Add your invoice logo** page displays a gray box instead of a logo and displays **No file selected** instead of the logo file name.

Including a Logo on Your Payment Page

You can use **Invoice Settings** as another way to add an image for your payment page. A payment logo is the image that your customers see when they pay you with PayPal.

If you already added a payment logo in your **Account Profile**, you don't need to add another one in **Invoice Settings**. If you add a payment logo in **Invoice Settings**, it will replace any existing payment page logo.

Your payment logo must meet the following requirements:

- **File format:** JPG, GIF, or PNG
- **File size limit:** 100KB, maximum
- **File resolution:** 90 pixels high x 500 pixels wide, maximum

If your image does not meet these requirements, adjust the image before you add it.

IMPORTANT: Before you add a logo, you must certify that you have the right to distribute the image and that it does not violate the *PayPal User Agreement* and the *Acceptable Use* policies.

Adding Your Payment Logo

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click the **Manage Invoices** subtab.

The **Manage invoices** page opens.

3. Click **Invoice Settings**.

The **Enter your contact information** page opens.

4. Click **Payment logo** in the **Invoice Settings** box at the left of the page.

The **Add your payment logo** page opens. It displays a gray box as a placeholder for the logo and **No file selected** next to the **Browse** button.

Add your payment logo

<div style="background-color: #f0f0f0; padding: 5px; margin-bottom: 5px;">Invoice Settings</div> <div style="padding: 5px; margin-bottom: 5px;">> Your contact information</div> <div style="padding: 5px; margin-bottom: 5px;">> Invoice logo</div> <div style="padding: 5px; margin-bottom: 5px;">▶ Payment logo</div> <div style="padding: 5px; margin-bottom: 5px;">> Tax information</div> <div style="padding: 5px; margin-bottom: 5px;">> Saved items</div> <div style="padding: 5px; margin-bottom: 5px;">> Templates</div> <div style="padding: 5px; margin-bottom: 5px;">> Address book</div>	<p>Add the image your customers will see when they pay you with PayPal.</p> <p>If you've already added a custom payment logo to your PayPal profile, we'll use that – you don't need to upload another one.</p> <p>If you upload a new payment logo here, the new logo will replace your existing one.</p> <p>You may need to resize your image to fit the display area.</p> <p>File format: JPG, GIF, or PNG File size limit: 100KB File resolution: 90 (h) x 500 (w) pixels</p> <div style="background-color: #f0f0f0; height: 40px; display: flex; align-items: center; justify-content: center; margin: 10px 0;"> Logo Size </div> <div style="display: flex; align-items: center; margin-bottom: 10px;"> <input type="button" value="Browse"/> No file selected. </div> <p style="font-size: small; color: #0070c0;">By uploading a file you certify that you have the right to distribute this image and that it does not violate the PayPal User Agreement and Acceptable Use policies.</p> <div style="text-align: center;"> <input type="button" value="Agree and Save"/> </div>
--	---

5. Click **Browse**.

The **Browse** dialog box opens.

6. Select the logo file to use and click **Open**.

7. Click **Agree and Save**.

IMPORTANT: When you click **Agree and Save** you are certifying that you have the right to distribute the image and that it does not violate the *PayPal User Agreement* and the *Acceptable Use* policies.

The **Add your payment logo** page replaces the gray box with your logo image and changes **No file selected** to the logo's file name. The logo is stored in your **Account Profile** and will appear on your customer's PayPal payment pages.

Changing Your Payment Logo in Invoice Settings

If you want to use a different payment logo, you can upload a different file in the **Add your payment logo** page in **Invoice Settings**.

1. Log in to your PayPal account.

2. Click the **Request Money** tab and then click the **Manage Invoices** subtab.

The **Manage invoices** page opens.

3. Click **Invoice Settings**.

The **Enter your contact information** page opens.

4. Click **Payment logo** in the **Invoice Settings** box at the left of the page.

The **Add your payment logo** page opens. It displays the logo currently stored in your Account Profile.

5. Click **Browse**.

The **Browse** dialog box opens.

6. Select the logo file to use and click **Open**.

7. Click **Agree and Save**.

IMPORTANT: When you click **Agree and Save** you are certifying that you have the right to distribute the image and that it does not violate the *PayPal User Agreement* and the *Acceptable Use* policies.

The **Add your payment logo** page replaces the old logo image with the new logo image and displays the new logo's file name next to the **Browse** button. The logo is stored in your **Account Profile** and will appear on your customer's PayPal payment pages.

Deleting Your Payment Logo in Invoice Settings

You can remove the logo in the **Add your payment logo** page in **Invoice Settings**. Deleting the logo in **Invoice Settings** will remove it from your **Account Profile**.

1. Log in to your PayPal account.

2. Click the **Request Money** tab and then click the **Manage Invoices** subtab.

The **Manage invoices** page opens.

3. Click **Invoice Settings**.

The **Enter your contact information** page opens.

4. Click **Payment logo** in the **Invoice Settings** box at the left of the page.

The **Add your payment logo** page opens.

5. Click **Remove**.

The **Add your payment logo** page displays a gray box instead of a logo and displays **No file selected** instead of the logo file name.

6

Working with Invoice Templates

Invoice templates allow you to create invoices faster. You store details about invoice items, prices, and standard tax rates in templates that you can use as a starting point for invoicing your customers.

Read the following topics to learn about creating and managing invoice templates.

- [“About Invoice Templates” on page 83](#)
- [“Creating Templates” on page 87](#)
- [“Managing Templates” on page 94](#)

About Invoice Templates

An invoice template contains values that you frequently include in an invoice. Using a template saves you time when you create an invoice by pre-filling invoice fields. For example, if you typically sell two taxable products together, you can create a template that contains the two items and their applicable taxes. Each time you have an order for those two products, you can use this template to enter the item information for you.

You can save the following information in an invoice template:

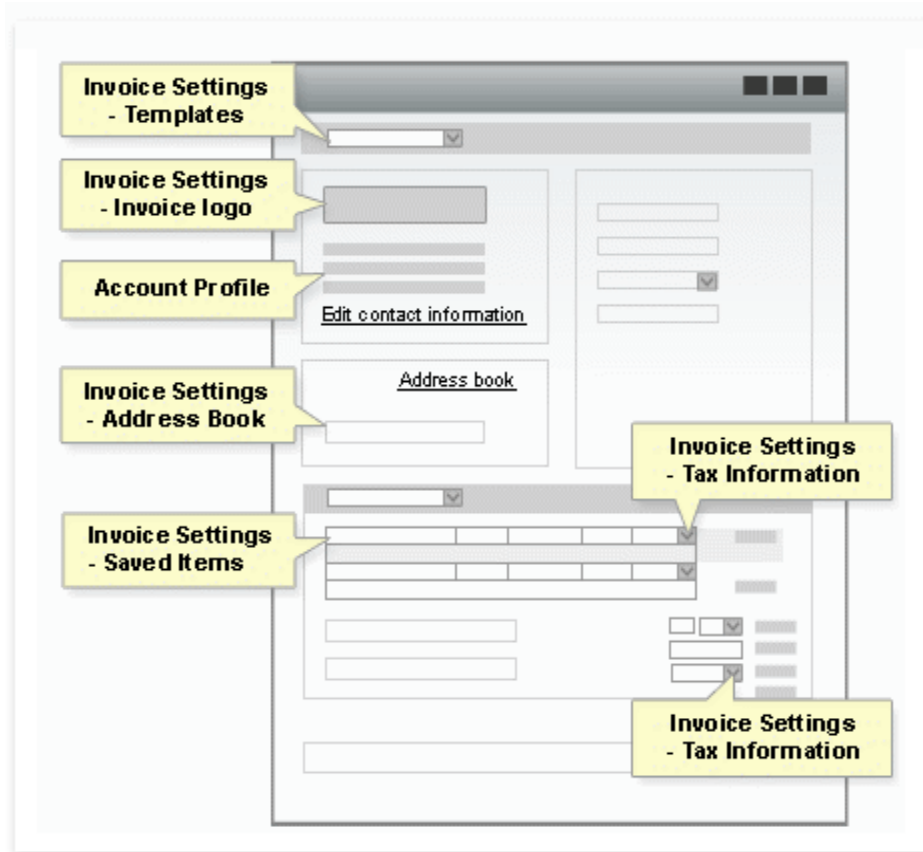
- Your contact information, including your logo
- Payment terms
- Currency
- Item information: Item name, quantity, unit price, tax, description
- Discount
- Shipping/handling
- Tax on shipping
- Terms and conditions text
- Note to recipient
- Memo

In the **Create a new invoice** page, you can see a list of the available templates in **Select a template**. When you first open the **Create a new invoice** page, the only template listed is the **PayPal Default Template**. As you add templates, they become available in **Select a template**. You can specify which template to use as the default in **Invoice Settings**.

You can create a maximum of 50 templates.

How Invoice Settings Relate to Invoice Template Contents

When you create a template, you can complete the invoice fields by entering the information directly or by selecting information that you have already saved in **Invoice Settings**.



Setting	From	Stored Information
Select a template	Invoice Settings: Templates	Includes one or more of the following: <ul style="list-style-type: none"> • Payment items • Item information • Shipping information • Terms and conditions • Note • Memo Use the template as a starting point to create an invoice or to create a new template.
Your contact information: Your logo	Invoice Settings: Invoice logo	The logo or image you want to appear on the invoice.

Setting	From	Stored Information
Your contact information	Account Profile	Displays the following information from your profile: <ul style="list-style-type: none"> • Email address • Name • Street address • Phone number(s)
Send to	Invoice Settings: Address book	Recipient's email address and the following optional information: <ul style="list-style-type: none"> • Business name • Billing address • Shipping address
Item information	Invoice Settings: Saved items	Item name and one or more of the following: <ul style="list-style-type: none"> • Description • Currency • Unit price • Tax
Tax	Invoice Settings: Tax information	Tax name and tax percentage.

Working with Templates

You can create and edit templates at several points in the invoicing process.

- Open the **Manage your templates** page in **Invoice Settings**.

Use the **Manage your templates** page when you want to perform maintenance on your templates or to view template contents without creating an invoice. On this page you can change your default template, delete a template, or open an **Edit template** page to view, create, or edit a template.

See [“Managing Templates” on page 94](#) for instructions.

- In the **Create a new invoice** page, select **Create a new template** from **Select a template** to open the **Edit template** page.

The **Edit template** page displays the default template's information. You can edit the information and save it as a new template or save the changes to the default template.

See [“Creating a Template in the Create a New Invoice Page” on page 89](#) for instructions.

- Save an invoice as a template.

When you create an invoice, you can save the invoice information in a template before completing the invoice. The recipient's email address, shipping, and billing information is not saved with the template.

See [“Saving an Invoice as a Template” on page 87](#) for instructions.

You create and edit templates using the **Edit template** page.

Edit template - Membership Package
[Secure](#)

Enter the information you'd like to include in your template.

Your contact information

Your logo

[Add logo](#)

Maya Twain
491 9th Street
Austin, TX 78701
United States
Phone: Don't show on invoice
pgrisier-us-02@paypal.com

[Edit contact information](#)

Invoice information

Invoice number

Invoice date

Payment terms [Learn more](#)

Due date

Send to
Recipient's email address

Select currency

Item name/ID	Date	Quantity	Unit price	Tax	Amount
<input type="text"/>	<input type="text"/>	1	<input type="text"/>	No tax	\$ 0.00
Description (optional) <input type="text"/>					+

Terms and conditions
For example: your return or cancellation policy

Characters: 1000

Subtotal

Discount

Shipping/handling

Tax on shipping

Total

Note to recipient

Characters: 1000

Memo (your recipient won't see this)

Characters: 150

Save Template
Preview
Cancel

This page looks like the **Create a new invoice** page except that certain fields are inactive. For example, the **Send to** section is inactive because you only need recipient information for an invoice.

Creating Templates

You can create invoice templates in the following ways:

1. Enter invoice information in the **Create a new invoice** page and save it as a template.
2. Select **Create a new template** from the **Select a template** list in the **Create a new invoice** page.
3. Add a new template in the **Templates** page in **Invoice Settings**.

Saving an Invoice as a Template

NOTE: If you need more detailed information about completing invoice fields, see [“Creating Invoices and Entering Details”](#) on page 17.

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click **Create Invoice**.

The **Create a new invoice** page opens.

3. Select a template name from **Select a template** to use as a starting point.

The **Create a new invoice** page displays the information stored in the template you selected.

4. Add or change the logo for the template.

Setting	Action
Add logo	Click to add a logo to the template. This setting appears when the template does not have a logo.
Change logo	Click to use a different logo. This setting appears when the template already contains a logo.
Remove logo	Click to delete the logo. This setting appears when the template already contains a logo.

See [“Including a Logo in Your Invoices”](#) on page 74 for detailed instructions.

5. Click **Edit contact information** to change your information for the new template.

See [“Editing Your Contact Information in an Invoice”](#) on page 70 for instructions.

6. Select the **Payment terms** for the template.
7. To change the currency for this template, select one in **Select currency**.
8. Enter one or more items.

Setting	Action
Item name/ID	Enter the item name. If you have saved items, select one from the list that appears when you click in the field.
Date	Enter the Date for the item. When you tab or click in the date field, a Calendar opens. Select the date from the Calendar or type the date in the field. The date is not saved with the template, but you can enter it if you plan to send an invoice with this information after you save the template.
Quantity	Enter the number of items.
Unit price	Enter the unit price. If you selected a saved item, the stored amount displays. You can change it, if necessary.
Tax	Select the tax for this item. If you selected a saved item with an assigned tax rate, the tax displays. You can change it, if necessary. If the correct tax rate is not listed, add a new tax. See “Adding Tax Information in an Invoice or Template” on page 128 for instructions.

9. Enter shipping and discount information:

Setting	Action
Discount	Enter a number and select a discount type.
Shipping/handling	Enter an amount.
Tax on shipping	Select the tax to apply to the shipping or handling fee. If the correct tax rate is not listed, add a new tax. See “Adding Tax Information in an Invoice or Template” on page 128 for instructions.

10. Enter invoice notes and text:

- Enter **Terms and conditions** text, up to 1,000 characters. This text appears on an invoice.
- Enter **Note to recipient** text, up to 1,000 characters. This text appears on an invoice.
- Enter **Memo** text, up to 150 characters. This text does not appear on an invoice.

11. Click **Save as Template**.

The **Save template** dialog box opens. The default template name displays in the text box.

Save template

Enter a name for your template and click Save.

The recipient's email address, shipping, and billing information won't be saved to the template.

Make this my default template. To change your default, go to your Invoice Settings.

12. Enter a template name in the text box.

13. Select **Make this my default template** to use this template as your default.

14. Click **Save**.

The **Create a new invoice** page opens and automatically selects the new template. You can send an invoice using your new template directly from this page.

Creating a Template in the Create a New Invoice Page

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click **Create Invoice**.

The **Create a new invoice** page opens.

3. Select **Create a new template** from **Select a template**.

The **Edit template** page opens. It automatically displays the information from your default invoice template.

4. Add or change the logo for the template.

Setting	Action
Add logo	Click to add a logo to the template. This setting appears when the template does not have a logo.
Change logo	Click to use a different logo. This setting appears when the template already contains a logo.
Remove logo	Click to delete the logo. This setting appears when the template already contains a logo.

See [“Including a Logo in Your Invoices” on page 74](#) for detailed instructions.

5. Click **Edit contact information** to change your information for the new template.

See [“Editing Your Contact Information in an Invoice” on page 70](#) for instructions.

6. Select the **Payment terms** for the template.
7. To change the currency for this template, select one in **Select currency**.
8. Enter one or more items.

Setting	Action
Item name/ID	Enter the item name. If you have saved items, select one from the list that appears when you click in the field.
Quantity	Enter the number of items.
Unit price	Enter the unit price. If you selected a saved item, the stored amount displays. You can change it, if necessary.
Tax	Select the tax for this item. If you selected a saved item with an assigned tax rate, the tax displays. You can change it, if necessary. If the correct tax rate is not listed, add a new tax. See “Adding Tax Information in an Invoice or Template” on page 128 for instructions.

9. Enter shipping and discount information:

Setting	Action
Discount	Enter a number and select a discount type.
Shipping/handling	Enter an amount.

Setting	Action
Tax on shipping	Select the tax to apply to the shipping or handling fee. If the correct tax rate is not listed, add a new tax. See “Adding Tax Information in an Invoice or Template” on page 128 for instructions.

10. Enter invoice notes and text:

- Enter **Terms and conditions** text, up to 1,000 characters. This text appears on an invoice.
- Enter **Note to recipient** text, up to 1,000 characters. This text appears on an invoice.
- Enter **Memo** text, up to 150 characters. This text does not appear on an invoice.

11. Click **Save Template**.

The **Save template** dialog box opens. The default template name displays in the text box.

Save template

Enter a name for your template and click Save.

The recipient's email address, shipping, and billing information won't be saved to the template.

Make this my default template. To change your default, go to your Invoice Settings.

12. Enter a template name in the text box.

13. Select **Make this my default template** to use this template as your default.

14. Click **Save**.

The **Create a new invoice** page opens and automatically selects the new template. You can now send an invoice using your new template.

Adding a Template in Invoice Settings

1. Log in to your PayPal account.
2. Click the **Request Money** tab.
3. Click **Invoice Settings**.

The **Enter your contact information** page opens.

- Click **Templates** in the **Invoice Settings** navigation list.

The **Manage your templates** page opens.

- Click **Create a New Template**.

The **Edit template** page opens. It automatically displays the information from your default invoice template.

- Add or change the logo for the template.

Setting	Action
Add logo	Click to add a logo to the template. This setting appears when the template does not have a logo.
Change logo	Click to use a different logo. This setting appears when the template already contains a logo.
Remove logo	Click to delete the logo. This setting appears when the template already contains a logo.

See [“Including a Logo in Your Invoices” on page 74](#) for detailed instructions.

- Click **Edit contact information** to change your information for the new template.

See [“Customizing Your Contact Information” on page 69](#) for instructions.

- Select the **Payment terms** for the template.

- To change the currency for this template, select one in **Select currency**.

- Enter one or more items.

Setting	Action
Item name/ID	Enter the item name. If you have saved items, select one from the list that appears when you click in the field.
Quantity	Enter the number of items.
Unit price	Enter the unit price. If you selected a saved item, the stored amount displays. You can change it, if necessary.
Tax	Select the tax for this item. If you selected a saved item with an assigned tax rate, the tax displays. You can change it, if necessary. If the correct tax rate is not listed, add a new tax. See “Adding Tax Information in an Invoice or Template” on page 128 for instructions.

11. Enter shipping and discount information:

Setting	Action
Discount	Enter a number and select a discount type.
Shipping/handling	Enter an amount.
Tax on shipping	Select the tax to apply to the shipping or handling fee. If the correct tax rate is not listed, add a new tax. See “Adding Tax Information in an Invoice or Template” on page 128 for instructions.

12. Enter invoice notes and text:

- Enter **Terms and conditions** text, up to 1,000 characters. This text appears on an invoice.
- Enter **Note to recipient** text, up to 1,000 characters. This text appears on an invoice.
- Enter **Memo** text, up to 150 characters. This text does not appear on an invoice.

13. Click **Save Template**.

The **Save template?** dialog box opens. The default template name displays in the text box.

Save template

Enter a name for your template and click Save.

The recipient's email address, shipping, and billing information won't be saved to the template.

Make this my default template. To change your default, go to your Invoice Settings.

14. Enter a template name in the text box.**15.** Select **Make this my default template** to use this template as your default.**16.** Click **Save**.

The **Manage your templates** page opens. Your saved templates display in the template list. The default template is highlighted and displays **Current default** in the **Default** column.

Managing Templates

When you create templates, you save information about invoice items, tax and shipping informations, and your contact information. When item costs or other information changes, you can edit your template to reflect the new information. You can make these changes as you create invoices. However, if you don't have an invoice to send or you have a lot of changes to make, use the **Manage your templates** page in **Invoice Settings** to go directly to your templates.

About the Manage Your Templates Page

The **Manage your templates** page displays a list of your saved templates. It displays the creation date, template name, whether it is the default template, and available actions.

Manage your templates

Invoice Settings

- > Your contact information
- > Invoice logo
- > Payment logo
- > Tax information
- > Saved items
- **Templates**
- > Address book

You can save up to 50 templates.

[Looking for your old templates?](#)

Created on	Name	Default	Actions
	PayPal Default Template	Current default	<input type="button" value="Create Invoice"/>
Jun 28, 2010	Membership Package	Set as default	<input type="button" value="Edit"/> ▼
Jul 8, 2010	Limited Edition 2010	Set as default	<input type="button" value="Edit"/> ▼
Jul 8, 2010	Keychain Discount Offer	Set as default	<input type="button" value="Edit"/> ▼

Use the **Manage your templates** page to perform the following tasks:

- Edit your templates.
- Change which template is the default.
- Delete an obsolete template.
- Create an invoice using a specific template.

In addition, you can preview what an invoice will look like when you create or edit a template.

Editing a Template

1. Log in to your PayPal account.
2. Click the **Request Money** tab.

3. Click **Invoice Settings**.

The **Enter your contact information** page opens.

4. Click **Templates** in the **Invoice Settings** navigation list.

The **Manage your templates** page opens.

5. Select **Edit** next to the template you want to see.

The **Edit template** page opens. The information for the selected template displays.

Edit template - Membership Package
Secure

Enter the information you'd like to include in your template.

Your contact information

Your logo

[Add logo](#)

Maya Twain
491 9th Street
Austin, TX 78701
United States
Phone: Don't show on invoice
pgrisier-us-02@paypal.com

[Edit contact information](#)

Invoice information

Invoice number

Invoice date

Payment terms [Learn more](#)

Due date

Send to
Recipient's email address

Select currency

Item name/ID	Date	Quantity	Unit price	Tax	Amount
<input type="text"/>	<input type="text"/>	1	<input type="text"/>	No tax	\$ 0.00
Description (optional) <input type="text"/>					+

Terms and conditions

For example: your return or cancelation policy

Characters: 1000

Note to recipient

Characters: 1000

Subtotal \$ 0.00

Discount \$ \$ 0.00

Shipping/handling \$ 0.00

Tax on shipping

Total **\$ 0.00**

Memo (your recipient won't see this)

Characters: 150

Save Template
Preview
Cancel

6. Add or change the logo included with the template.

Setting	Action
Add logo	Click to add a logo to the template. This setting appears when the template does not have a logo.
Change logo	Click to use a different logo. This setting appears when the template already contains a logo.
Remove logo	Click to delete the logo. This setting appears when the template already contains a logo.

See [“Including a Logo in Your Invoices” on page 74](#) for detailed instructions.

7. Click **Edit contact information** to change your information for the new template.

See [“Customizing Your Contact Information” on page 69](#) for instructions.

8. Select the **Payment terms** for the template.

9. To change the currency for this template, select one in **Select currency**.

10. Add, edit, or delete items.

Setting	Action
Item name/ID	Enter the item name. If you have saved items, select one from the list that appears when you click in the field.
Quantity	Enter the number of items.
Unit price	Enter the unit price. If you selected a saved item, the stored amount displays. You can change it, if necessary.
Tax	Select the tax for this item. If you selected a saved item with an assigned tax rate, the tax displays. You can change it, if necessary. If the correct tax rate is not listed, add a new tax. See “Managing Your Tax Information” on page 127 for instructions.
Delete row	Click to delete the entire row for the item.

11. Enter shipping and discount information:

Setting	Action
Discount	Enter a number and select a discount type.
Shipping/handling	Enter an amount.

Setting	Action
Tax on shipping	Select the tax to apply to the shipping or handling fee. If the correct tax rate is not listed, add a new tax. See “ Managing Your Tax Information ” on page 127 for instructions.

12. Enter invoice notes and text:

- Enter **Terms and conditions** text, up to 1,000 characters. This text appears on an invoice.
- Enter **Note to recipient** text, up to 1,000 characters. This text appears on an invoice.
- Enter **Memo** text, up to 150 characters. This text does not appear on an invoice.

13. Click **Save Template**.

The **Save template** dialog box opens. It displays the name of your template.

14. Select **Make this my default template** to use this template as your default.

15. Click **Save**.

The **Manage your templates** page opens. Your saved templates display in the template list. The default template is highlighted and displays **Current default** in the **Default** column.

Setting the Default Template

When you open the **Manage your templates** page, the default template is highlighted and displays **Current default** in the **Default** column.

Manage your templates

You can save up to 50 templates.

Create a New Template

Created on	Name	Default	Actions
	PayPal Default Template	Set as default	Create Invoice
Jun 28, 2010	Membership Package	Current default	Edit

1. Log in to your PayPal account.
2. Click the **Request Money** tab.
3. Click **Invoice Settings**.

The **Enter your contact information** page opens.

4. Click **Templates** in the **Invoice Settings** navigation list.

The **Manage your templates** page opens.

5. Click **Set as default** in the **Default** column for the template to use as the default.

The **Default** column entry changes to **Current default** and the template information is highlighted. The old default template now displays **Set as default** in the **Default** column.

When you create a new invoice, it will automatically select the default template.

Previewing Templates

When you create or edit a template, you can preview how an invoice based on that template will look.

1. Log in to your PayPal account.
2. Click the **Request Money** tab.
3. Click **Invoice Settings**.

The **Enter your contact information** page opens.

4. Click **Templates** in the **Invoice Settings** navigation list.

The **Manage your templates** page opens.

5. Create a new template and add information.

- Or -

Edit an existing template.

See [“Creating Templates” on page 87](#) and [“Editing a Template” on page 94](#) for detailed instructions.

6. Click **Preview**.

The **Preview template** page opens and displays a sample invoice. It does not display information for fields that are not saved with the template.

Preview template - PayPal Default Template

Save Template Edit Print

INVOICE

Maya Twain
491 9th Street
Austin, TX 78701
United States
Phone: Don't show on invoice
pgrisier-us-02@paypal.com

Invoice number	
Invoice date	
Terms	Due on receipt
Due date	

Bill To **Ship To**

Description	Quantity	Unit price	Amount
Shirt - 12345 - White Logo T-Shirt	1	\$20.00	\$20.00
Hat - 23456 - Black Hat with small logo	1	\$25.00	\$25.00
Keychain - 98765	1	\$8.00	\$8.00
		Subtotal	\$53.00
		Shipping/handling	\$4.95
		CA Tax 9.75%	\$5.17
		Total	\$63.12 USD

Save Template Edit Print

7. After reviewing the invoice, perform one of the following actions.

- Click **Save Template**.
The **Manage your templates** page opens. It displays a list of your invoice templates.
- Click **Print** to print the sample invoice.

- Click **Edit** to change template information.
See [“Editing a Template” on page 94](#) for instructions.

Deleting Templates

1. Log in to your PayPal account.
2. Click the **Request Money** tab.
3. Click **Invoice Settings**.
The **Enter your contact information** page opens.
4. Click **Templates** in the **Invoice Settings** navigation list.
The **Manage your templates** page opens.
5. Select **Delete** in the **Actions** column for the template to remove.
The **Delete template?** dialog box opens.
6. Click **Delete** to confirm that you want to delete this template.
The **Manage your templates** page opens. The template you deleted no longer appears in the template list.

7

Working with the Address Book

Use the **Address book** to store contact information for your customers. You can access your **Address book** information through **Invoice Settings** or during the invoicing process.

Read the following topics to learn about creating and managing **Address book** entries.

- [“About the Address Book” on page 103](#)
- [“Adding Contacts to the Address Book” on page 104](#)
- [“Editing Address Book Entries” on page 110](#)
- [“Searching for Contacts” on page 114](#)
- [“Deleting Address Book Entries” on page 115](#)

About the Address Book

Use the **Address book** to store information about your customers. You identify customers by their email addresses. You can add the following optional information for each customer:

- Name
- Company name
- Phone numbers
- Country
- Currency
- Language
- Billing information
- Shipping information

In addition, you can add notes to include in an invoice and memos to yourself that will not appear on the invoice.

You can access **Address book** information when you create invoices, when you research invoices in **Manage Invoices**, and in **Invoice Settings**.

You can search your address book by email address, contact name, or company name.

You can edit any field for a contact or delete a contact if you no longer need it.

Accessing the Address Book

You can access the **Address book** in the following ways:

- Click the **Address book** link in the **Create a new invoice** page.

The **Address book** page opens and lists your contacts. You can search for a contact or add a new one to use in the invoice.

- Click the recipient name in the **Manage Invoices** page.

The **Address book** page opens and displays the contact's information in the right column.

- Select **Address book** from the **Invoice Settings** navigation box.

The **Address book** page opens and lists your contacts. You can add, edit, delete, or search for your contacts.

Adding Contacts to the Address Book

You can add contact information to the **Address book** in the following ways:

1. Select **Add billing and shipping information** in an invoice.

When you complete the recipient information for the current invoice, you can save it to your **Address book** to use again. When you enter a recipient's email address in an invoice, a drop down list displays any matching **Address book** entries.

2. Add new contact using the **Address book** page in **Invoice Settings**.

You must enter an email address for each contact. All remaining **Address book** information is optional.

Saving Recipient Information to the Address Book

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click **Create Invoice**.

The **Create a new invoice** page opens.

3. Enter the **Recipient's email address**.
4. Click **Add billing and shipping information**.

The **Recipient information** page opens.

Recipient information

Send to
Recipient's email address
pgrisier-us-01@paypal.com

Billing information (optional)

First name
[text box]

Last name
[text box]

Business name
[text box]

Country
United States [dropdown]

Address Line 1
[text box]

Address Line 2 (optional)
[text box]

ZIP Code
[text box]

City/State
[text box] [dropdown]

Additional information [What is this?](#)
[text box]

Update recipient's billing information in my address book

Shipping information (optional)

Don't show shipping information
 Same as billing address
 Enter a different address

First name
[text box]

Last name
[text box]

Business name
[text box]

Country
United States [dropdown]

Address Line 1
[text box]

Address Line 2 (optional)
[text box]

ZIP Code
[text box]

City/State
[text box] [dropdown]

Update recipient's shipping information in address book
The recipient's name and the business name won't be saved with the shipping information.

Save **Cancel**

5. Enter **Billing information** (optional).

Field	Description
First name	Enter the recipient's first or given name.
Last name	Enter the recipient's last or family name.
Business name	Enter the name of recipient's business.
Country	Select the country from the drop down list.
Address line 1	Enter up to 2 lines of the recipient's address.
Address line 2	

Field	Description
Zip code	Enter the zip or postal code.
City/State	Enter the city name in the first field. Select a state code from the drop down list in the second field.
Additional information	Enter any information you want to track for this recipient. For example, you can enter your recipient's account number in this field.

6. Click **Update recipient's billing information in my address book**.

7. Select a shipping address option:

– **Don't show shipping information**

Select this option when you want to track shipping information, but do not want it to appear in the invoice. When you select this option, the page does not display shipping information fields. You must select the **Same as billing address** option to show the shipping information fields.

– **Same as billing address**

Select this option when the billing and shipping information are the same. This option is automatically selected when you add address information for a recipient.

– **Enter a different address**

Select this option when the billing and shipping information are different and you want the shipping information to appear in the invoice. When you select this option, the **Recipient information** page displays shipping information fields for you to use.

8. Enter **Shipping Information**.

Field	Description
First name	Enter the recipient's first or given name.
Last name	Enter the recipient's last or family name.
Business name	Enter the name of recipient's business.
Country	Select the country from the drop down list.
Address line 1 Address line 2	Enter up to 2 lines of the recipient's address.
Zip code	Enter the zip or postal code.
City/State	Enter the city name in the first field. Select a state code from the drop down list in the second field.
Update recipient's shipping information in address book	Select this option to save the shipping address in your Address book . The recipient's shipping name and shipping business name are for this invoice only and not saved in the Address book .

9. Click **Save**.

When you save the recipient information, it displays the address information in the invoice. If you chose to save the billing or shipping information, you will see this information in your **Address book**.

Adding a Contact in the Address Book Page

1. Log in to your PayPal account.
2. Click the **Request Money** tab.
3. Open the **Address book** page.
 - Click **Invoice Settings**. The **Enter your contact information** page opens.
Click **Address book** in the **Invoice Settings** navigation box.
 - Or -
 - Click **Create an invoice**. The **Create a new invoice** page opens.
Click **Address book**.
4. Click **Add a new contact**.

The **Add Contact** page opens.

Add Contact

Primary contact Information

Email address

You don't have to complete every field.

First name

Last name

Company

Phone number 1
 Mobile ▼

Phone number 2
 Work ▼

[Add more numbers](#)

Country
 ▼

Currency
 ▼

Language
 ▼

Additional information [What is this?](#)

Billing Information

Country
 ▼

Address Line 1

Address Line 2 (optional)

ZIP Code

City/State
 ▼

Shipping Information

Same as billing address
 Enter a different address

Country
 ▼

Address Line 1

Address Line 2 (optional)

ZIP Code

City/State
 ▼

Memo

Save

5. Enter **Primary contact information**. You must enter an email address, but the rest of the fields are optional.

Field	Description
Email address	Enter the contact's email address. (Required)
First name	Enter the contact's first or given name.
Last name	Enter the contact's last or family name.
Company	Enter the name of contact's business.
Phone number 1	Enter a phone number. Select a phone number type from the drop down list. For example, if this is a mobile phone number, select Mobile .
Phone number 2	Enter a second phone number. Select a phone number type from the drop down list. For example, if this is a mobile phone number, select Mobile .
Add more numbers	Click to add more numbers if you need more than two numbers for this contact. When you select this option, another Phone Number field displays below the last number you entered.
Country	Select the country from the drop down list.
Currency	Select the currency to use for this contact's invoices from the drop down list.
Language	Select the language to use for this contact's invoices.
Additional information	Enter any information you want to appear on the invoice. For example, use this field to track the contact's account number.

6. Enter **Billing information**.

Field	Description
Country	Select the billing address country from the drop down list.
Address Line 1 Address Line 2	Enter up to 2 lines of the contact's billing address.
Zip Code	Enter the zip or postal code.
City/State	Enter the city name for the billing address in the first field. Select a state code from the drop down list in the second field.

- Click **Enter a different address** in **Shipping information** to enter a separate shipping address.

When you select this option, the **Add Contact** page displays shipping address fields.

Field	Description
Country	Select the shipping address country from the drop down list.
Address Line 1 Address Line 2	Enter up to 2 lines of the contact's shipping address.
Zip Code	Enter the zip or postal code.
City/State	Enter the city name for the shipping address in the first field. Select a state code from the drop down list in the second field.

- Enter text in **Memo** to track information for your own use.

NOTE: This information does not appear in the invoice.

- Click **Save**.

The **Address book** page opens. Your new contact appears in the list on the left side of the page and is automatically selected. The contact's information appears on the right side of the page.

- Click **Add to Invoice**.

The **Create a new invoice** page opens. It displays the contact's information from the **Address book**.

Editing Address Book Entries

When a recipient's information changes, you can edit it in your address book. You can access the **Address book** to edit entries in the following ways:

- Click the **Address book** link in an invoice.
- Select the **Address book** page in **Invoice Settings**.

Editing a Contact

To add or edit contact information, you can access the **Address book** in **Invoice Settings** or from the **Create a new invoice** page.

- Log in to your PayPal account.
- Click the **Request Money** tab.
- Open the **Address book** page.

- Click **Invoice Settings**. The **Enter your contact information** page opens.
Click **Address book** in the **Invoice Settings** navigation box.
 - Or -
 - Click **Create an invoice**. The **Create a new invoice** page opens.
Click **Address book**.
4. Select the contact to edit in the address list on the left side of the page.
The contact's information appears on the right side of the page.
 5. Click **Edit**.
The **Edit contact information** page opens.

Edit contact information

Primary contact Information

Email address
pgrisier-us-01@paypal.com

You don't have to complete every field.

First name
Phil

Last name
Grisier

Company
ABC Corp

Phone number 1
 Mobile

Phone number 2
 Work

[Add more numbers](#)

Country
United States

Currency
USD - U.S. Dollars

Language
English

Additional information [What is this?](#)
123-456

Billing Information

Country
United States

Address Line 1
1221 South First St.

Address Line 2 (optional)
#102

ZIP Code
95131

City/State
San Jose CA

Shipping Information

Shipping Address
 Same as billing address
 Enter a different address

Country
United States

Address Line 1
1234 Main Street

Address Line 2 (optional)

ZIP Code
95131

City/State
San Jose CA

Memo

6. Edit the **Primary contact information**.

Field	Description
Email address	Contact's email address. (Required)
First name	Contact's first or given name.
Last name	Contact's last or family name.
Company	Name of contact's business.
Phone number 1	First phone number. Select a phone number type from the drop down list. For example, if this is a mobile phone number, select Mobile .
Phone number 2	Second phone number. Select a phone number type from the drop down list. For example, if this is a mobile phone number, select Mobile .
Add more numbers	Click if you need more than two phone numbers for this contact. When you select this option, another Phone Number field displays below the last number you entered.
Country	Country; select from the drop down list.
Currency	Currency to use for this contact's invoices; select from the drop down list.
Language	Language to use for this contact's invoices.
Additional information	Any information you want to appear on the invoice. For example, use this field to track the contact's account number.

7. Edit **Billing information**.

Field	Description
Country	Billing address country; select from the drop down list.
Address Line 1 Address Line 2	Up to 2 lines of the contact's billing address.
Zip Code	Zip or postal code.
City/State	City name for the billing address in the first field. State code in the second field; select from the drop down list.

8. Edit any existing shipping information.

- Or -

Click **Enter a different address** in **Shipping information** to enter a shipping address.

When you select this option, the **Edit Contact** page displays shipping address fields.

Field	Description
Country	Shipping address country; select from the drop down list.
Address Line 1 Address Line 2	Up to 2 lines of the contact's shipping address.
Zip Code	Zip or postal code.
City/State	Shipping address city name in the first field. Shipping state code in the second field; select from the drop down list.

9. Enter text in **Memo** to track information for your own use.

NOTE: This information does not appear in the invoice.

10. Click **Save**.

The **Address book** page opens. Your edited contact appears in the list on the left side of the page and is automatically selected. The contact's information appears on the right side of the page.

11. You can now add or edit other **Address book** entries.

- Or -

If you opened the **Address book** from the **Create a new invoice** page, click **Add to Invoice**.

The **Create a new invoice** page opens and displays the contact's edited information from the **Address book**.

Searching for Contacts

When you open the **Address book**, you can look for contacts using the **Search** field. **Address book Search** looks through the following fields to locate matching information:

- Email address
- First or given name
- Last or family name
- Company name

When you enter text in the field, **Search** automatically begins looking for a match on the third character you type. Matching contacts display below **Search**. You can continue to refine the

search by entering more characters. If you want **Search** to start before the third character, click **Go**.

If there are no matches, a message displays. Enter different search text to try again.

Searching for a Contact

1. Open the **Address book**.

Click **Address book** in the **Create an invoice page**.

- Or -

Click **Address book** in **Invoice Settings**.

Address book

[Go to Invoice Settings](#)

Search

Jane Smythe (jsmythe@tvcomm.co...	<p>Jane Smythe</p> <p>Edit | Delete</p>
Jim Kay (jmkay@techcomm.com)	
Mary Brown (mbrown@abc.com)	
Nick Michael (pgrisier-us-01@p...	<p>Jane Smythe</p> <p>jsmythe@tvcomm.com</p> <p>United States</p> <p>U.S. Dollars (\$USD)</p> <p>English</p>
Zac Thistle (zac.thistle@xyz.c...	
ZZ Top (pgrisier-us-08@paypal....	

2. Begin entering text in **Search**.

Address book begins searching for matches on the third character. You can start the search sooner by clicking **Go**.

A list of matching contacts displays below the **Search** field. If there are no matches, you'll see a message instead.

3. Delete the text in **Search** to show all **Address book** entries again.

Deleting Address Book Entries

If you no longer need a contact, you can delete the entry from the **Address book**. You can access the **Address book** to delete entries in the following ways:

1. Click the **Address book** link in an invoice.
2. Select the **Address book** page in **Invoice Settings**.

Deleting Contacts

You can access your address book from the **Create a new invoice** page to delete contact information for a recipient.

1. Log in to your PayPal account.
2. Click the **Request Money** tab.
3. Open the **Address book** page.
 - Click **Invoice Settings**. The **Enter your contact information** page opens. Click **Address book** in the **Invoice Settings** navigation box.
 - Or –
 - Click **Create an invoice**. The Create a new invoice page opens. Click **Address book**.
4. Click the contact to delete in the address list on the left side of the page.

The contact's information appears on the right side of the page.

Address book

[Go to Invoice Settings](#)

Search Go [Add a new contact](#)

<p>Mary Brown (mbrown@abc.com)</p>	<p>Mary Brown</p> <p>Edit | Delete</p> <p>Mary Brown ABC Corp mbrown@abc.com 408-555-9898 (Mobile) United States U.S. Dollars (\$USD) English</p> <p>Billing address 1234 Elm Street Garden City, CA 95120 United States</p> <p>Shipping address Same as billing address</p>
------------------------------------	---

[Go to Invoice Settings](#)

5. Click **Delete**.

The **Delete contact?** dialog box opens.

6. Click **Delete**.

The **Address book** page opens. The deleted contact no longer appears in the list on the left side of the page.

7. You can now work on other **Address book** entries.

- Or -

If you opened the **Address book** from the **Create a new invoice** page and do not want to use an **Address book** contact in your invoice, click **Go to invoice**.

The **Create a new invoice** page opens. It does not display a recipient.

- Or -

If you opened the **Address book** from the **Create a new invoice** page and want to use an **Address book** contact in your invoice, select a contact and click **Add to Invoice**.

The **Create a new invoice** page opens and displays the contact's **Address book** information.

8

Working with Saved Items

If you frequently include particular items in your invoices, such as your best-selling products or services, you can store that information and use it again to save time when you create invoices.

Read the following topics to learn about saving and editing invoice items.

- [“About Saved Items” on page 119](#)
- [“Adding a Saved Item” on page 120](#)
- [“Editing Saved Items” on page 123](#)
- [“Deleting Saved Items” on page 125](#)

About Saved Items

Saved items are items you frequently include in your invoices. Using saved items reduces the number of things you type when you create an invoice. Instead of entering all of the information for an invoice item, you select a saved item from a drop down list to use its information to complete the fields. After entering a date and a quantity for the item, you can go on to the next invoice item.

You can easily edit information about saved items using the **Saved items** page in **Invoice Settings**. You can store up to 100 items. For each item, you assign an item name or ID to identify the item, select the currency to use, and enter a description, the cost per unit, and any applicable taxes.

Saved items

Save the items you frequently include on your invoices. You can save up to 100 items.

[Add a New Item](#)

Item name	Description	Currency	Unit price	Action
Hat - 23456	Black Hat with small logo	\$ USD	25.00	Edit ▼
Keychain - 98765		\$ USD	8.00	Edit ▼
Shirt - 12345	White Logo T-Shirt	\$ USD	20.00	Edit ▼
White Logo T-Shirt		\$ USD	20.00	Edit ▼

If you reach the maximum of 100 items, you must delete a saved item before you can add another.

What's in a Saved Item?

- **Item name:** (Required) Identifies the item. You can use the item's name or some other identifier. This name appears on the invoice.
- **Description:** Describes the item to your customer. This information appears on the invoice. One way to use the description is to identify the SKU# for the item. **Description** has a maximum of 300 characters.
- **Currency:** Currency code to use for this item. It defaults to the currency you identified as your primary currency in your **Account Profile**. You can select a different currency from the drop down list.
- **Unit Price:** (Required) Cost of one item.
- **Tax:** Percentage of tax that applies to this item. You can select a saved tax or add a new one.

Adding a Saved Item

You can save item information in two ways:

1. Save item information entered in an invoice.
2. Add an item in the **Saved items** page in **Invoice Settings**.

The minimum information you can save for an item is the item name and the unit price. All other item information is optional.

Adding an Item in an Invoice

1. Log in to your PayPal account.
2. Click the **Request Money** tab and then click **Create Invoice**.

The **Create a new invoice** page opens.

3. Enter item information.
 - **Item name/ID**
Enter the item name. This name is required and will appear in the drop down list when you enter invoice items.
 - **Date**
When you tab or click in the date field, a **Calendar** opens. Select the date from the **Calendar** or type the date in the field.
NOTE: This field is not stored with the item, but is required to send an invoice.
 - **Quantity**
Automatically set to 1.

NOTE: This field is not stored with the item, but is required to send an invoice.

– **Unit price**

Enter the price of a single item. This price is required to save the item.

– **Tax**

Automatically set to **No tax**. Select a tax from the drop down list, if this item is subject to tax. If the tax does not appear in the drop down list, select **Add tax** to create one. See “[Adding Tax Information](#)” on page 128 for instructions.

– **Description**

Enter optional information about the item to include in the invoice. Use the description to help the recipient identify the item or to track additional information, such as the product SKU#.

4. Click **Save Item** next to the item to store.

Save Item changes from a link to unlinked text to show it is stored.

Item name/ID	Date	Quantity	Unit price	Tax	Amount	
White Logo T-Shirt	6/28/2010	1	20.00	No tax	\$ 20.00	
Description (optional)					Item saved	Delete row +
Black Hat - Large Logo	6/28/2010	1	25	No tax	\$ 25.00	
Description (optional)					Save item	Delete row +
		1		No tax	\$ 0.00	
Description (optional)						Delete row +

Adding an Item in Invoice Settings

1. Log in to your PayPal account.
 2. Click the **Request Money** tab.
 3. Click **Invoice Settings**.
- The **Enter your contact information** page opens.
4. Click **Saved Items** in the **Invoice Settings** box at the left of the page.
 5. Click **Add a New Item**.

The **Add a new item** box opens.

Add a new item

Item name
Mug-67890

Description
12-ounce coffee mug with logo
Characters: 271

Currency
USD - U.S. Dollars

Unit price
10.00

Tax
No tax
No tax
Add tax
CA Tax 9.75%

Save Cancel

6. Enter item information.

– **Item name**

Enter the item name. This is a required field. The name appears in the drop down list when you enter invoice items.

– **Description**

Enter optional information about the item to include in the invoice. Use the description to help the recipient identify the item or to track additional information, such as the product SKU#.

– **Currency**

Select the currency to use for this item.

– **Unit price**

Enter the price of a single item. You must enter a price to save the item.

– **Tax**

Automatically set to **No tax**. If this item is subject to tax, select a tax from the drop down list. If the tax you need does not appear in the drop down list, select **Add tax** to create one. See [“Adding Tax Information” on page 128](#) for instructions.

7. Click **Save**.

The item appears in the list of saved items on the page. When you create a new invoice, the item appears in the drop down list when you click in **Item Name/ID**.

Editing Saved Items

If item information has changed or you want to add more information to a saved item, you can make those changes in the **Saved items** page. There are no restrictions on what you can change for a saved item. When you save the edited information, the item is updated and will be available to all invoices created after the edit.

Editing a saved item does not change any existing invoices or templates that contain the previous information for the item. To use the updated item in your template, you must edit the template.

See [“Managing Templates” on page 94](#) for instructions on updating your templates.

Editing a Saved Item

Use the **Saved items** page in Invoice Settings to edit saved items.

1. Log in to your PayPal account.
2. Click the **Request Money** tab.
3. Click **Invoice Settings**.

The **Enter your contact information** page opens.

4. Click **Saved Items** in the **Invoice Settings** navigation list at the left of the page.
5. Select **Edit** from the **Action** drop down list.

The **Edit an item** box opens.

Edit an item

Item name
Keychain - 98765

Description
Characters: 300

Currency
USD - U.S. Dollars

Unit price
8.00

Tax
CA Tax 9.75%

Save Cancel

6. Change or add information in any of the fields:

– **Item name**

This is a required field. The name appears in the drop down list when you enter invoice items.

– **Description**

Optional information about the item to include in the invoice. Use the description to help the recipient identify the item or to track additional information, such as the product SKU#.

– **Currency**

Change the currency to use for this item.

– **Unit price**

Change the price of a single item. This is a required field.

– **Tax**

Select a tax from the drop down list or create a new one. See [“Adding Tax Information” on page 128](#) for instructions.

7. Click **Save**.

The edited item appears in the list of saved items on the page. When you create a new invoice, the edited item appears in the drop down list when you click in **Item Name/ID**.

Deleting Saved Items

You can delete any saved item in the **Saved items** page. Deleting a saved item does not affect any existing invoices or templates that use that item. To remove the deleted item from a template, you must edit the template.

See [“Managing Templates” on page 94](#) for instructions on updating your templates.

Deleting a Saved Item

Use the **Saved items** page in **Invoice Settings** to delete stored items.

1. Log in to your PayPal account.
2. Click the **Request Money** tab.
3. Click **Invoice Settings**.

The **Enter your contact information** page opens.

4. Click **Saved Items** in the **Invoice Settings** navigation list at the left of the page.
5. Select **Delete** from the **Action** drop down list.

The **Delete item** box opens.

6. Click **Delete**.

The deleted item no longer appears in the **Saved items** list.

9

Managing Your Tax Information

If you must collect tax on invoice items or shipping costs, you can add the tax rates to your **Invoice Settings** to use in your invoices.

Read the following topics to learn about saving and editing invoice items.

- [“About Tax Information” on page 127](#)
- [“Adding Tax Information” on page 128](#)
- [“Editing Tax Information” on page 132](#)
- [“Deleting Tax Information” on page 134](#)

About Tax Information

You can store tax information to use in your invoices. Taxes can include sales taxes, GST, or VAT. You can store up to 10 taxes in **Invoice Settings**.

For each tax, assign a name and enter a percentage rate to apply to invoice items. Stored taxes appear in all **Tax** drop down lists in the invoice. You can edit and delete tax information without restriction.

Enter your tax information

Enter up to 10 taxes (for example, Tax, GST, VAT) that will be available for specific items and invoices.

Invoice Settings	Tax name	Rate
> Your contact information	CA Tax	9.75 %
> Invoice logo		%
> Payment logo		%
▸ Tax information		%
> Saved items		%
> Templates		%
> Address book		%
		%
		%
		%
		%
		%
		%
		%
		%
		%

Changing or deleting tax information does not affect existing invoices, saved items, or templates that contain the old tax information. To reflect the new tax in a saved item or template, you must edit them.

See [“Managing Templates” on page 94](#) and [“Editing Saved Items” on page 123](#) for instructions.

Adding Tax Information

You can add tax information in two ways:

1. Select **Add tax** from the **Tax** or **Tax on shipping** drop down lists when you create an invoice.
2. Add a tax in the **Tax information** page in **Invoice Settings**.

You can add up to 10 tax percentages to use in invoices.

Adding Tax Information in an Invoice or Template

You can add tax information during invoice creation or when you are adding or updating invoice templates.

1. Select **Add tax** from one of the following drop down lists: or from **Tax on shipping** drop down list.
 - **Tax** in the invoice item list
 - **Tax on shipping** below **Shipping/handling**

Select currency: USD - U.S. Dollars

Item name/ID	Date	Quantity	Unit price	Tax	Amount
White Logo T-Shirt	6/28/2010	1	20.00	No tax	\$ 20.00
Description (optional)					
		1		No tax	\$ 0.00
Description (optional)					

Terms and conditions: For example: your return or cancelation policy

Subtotal: \$ 20.00
 Discount: \$ 0.00
 Shipping/handling: \$ 0.00
 Tax on shipping: No tax
 Total: \$ 20.00

The **Enter your tax information** box opens.

2. Enter a name in **Tax name**. Tax names have a maximum of 6 characters.
3. Enter a tax percentage in **Percentage**.

Enter your tax information

Enter tax information to use for future invoices.

Tax name
 For example, Tax, GST, VAT

Rate
 %

4. Click **Save**.

The tax name and percentage display in the invoice or template. The tax appears in the **Enter your tax information** page in **Invoice Settings** and appears as a selection in the **Tax** and **Tax on shipping** drop down lists.

Adding Tax Information in Invoice Settings

1. Log in to your PayPal account.
2. Click the **Request Money** tab.
3. Click **Invoice Settings**.

The **Enter your contact information** page opens.

4. Click **Tax information** in the **Invoice Settings** box at the left of the page.

Enter your tax information

<div style="background-color: #f0f0f0; padding: 2px; margin-bottom: 5px;">Invoice Settings</div> <ul style="list-style-type: none"> <li style="padding: 2px 5px 2px 10px;">> Your contact information <li style="padding: 2px 5px 2px 10px;">> Invoice logo <li style="padding: 2px 5px 2px 10px;">> Payment logo <li style="padding: 2px 5px 2px 10px;">▶ Tax information <li style="padding: 2px 5px 2px 10px;">> Saved items <li style="padding: 2px 5px 2px 10px;">> Templates <li style="padding: 2px 5px 2px 10px;">> Address book 	<p style="font-size: small; margin: 0;">Enter up to 10 taxes (for example, Tax, GST, VAT) that will be available for specific items and invoices.</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; border-bottom: 1px solid #ccc; padding: 2px;">Tax name</th> <th style="text-align: left; border-bottom: 1px solid #ccc; padding: 2px;">Rate</th> </tr> </thead> <tbody> <tr> <td style="border: 1px solid #ccc; padding: 2px;">CA Tax</td> <td style="border: 1px solid #ccc; padding: 2px;">9.75 %</td> </tr> <tr> <td style="border: 1px solid #ccc; padding: 2px;"> </td> <td style="border: 1px solid #ccc; padding: 2px;"> %</td> </tr> <tr> <td style="border: 1px solid #ccc; padding: 2px;"> </td> <td style="border: 1px solid #ccc; padding: 2px;"> %</td> </tr> <tr> <td style="border: 1px solid #ccc; padding: 2px;"> </td> <td style="border: 1px solid #ccc; padding: 2px;"> %</td> </tr> <tr> <td style="border: 1px solid #ccc; padding: 2px;"> </td> <td style="border: 1px solid #ccc; padding: 2px;"> %</td> </tr> <tr> <td style="border: 1px solid #ccc; padding: 2px;"> </td> <td style="border: 1px solid #ccc; padding: 2px;"> %</td> </tr> <tr> <td style="border: 1px solid #ccc; padding: 2px;"> </td> <td style="border: 1px solid #ccc; padding: 2px;"> %</td> </tr> <tr> <td style="border: 1px solid #ccc; padding: 2px;"> </td> <td style="border: 1px solid #ccc; padding: 2px;"> %</td> </tr> <tr> <td style="border: 1px solid #ccc; padding: 2px;"> </td> <td style="border: 1px solid #ccc; padding: 2px;"> %</td> </tr> <tr> <td style="border: 1px solid #ccc; padding: 2px;"> </td> <td style="border: 1px solid #ccc; padding: 2px;"> %</td> </tr> </tbody> </table> <div style="text-align: right; margin-top: 10px;"> <input type="button" value="Save"/> </div>	Tax name	Rate	CA Tax	9.75 %		%		%		%		%		%		%		%		%		%
Tax name	Rate																						
CA Tax	9.75 %																						
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5. Enter a name in an empty **Tax name** field. Tax names have a maximum of 6 characters.
6. Enter the tax percentage in the **Percentage** box next to the new name.
7. Click **Save**.

When you create a new invoice, your new tax rate appears in the **Tax** and **Tax on shipping** drop down lists.

When you add or create a saved item in **Invoice Settings**, your new tax rate appears in the **Tax** drop down list.

Adding Tax Information in a Saved Item

1. Log in to your PayPal account.
2. Click the **Request Money** tab.
3. Click **Invoice Settings**.

The **Enter your contact information** page opens.

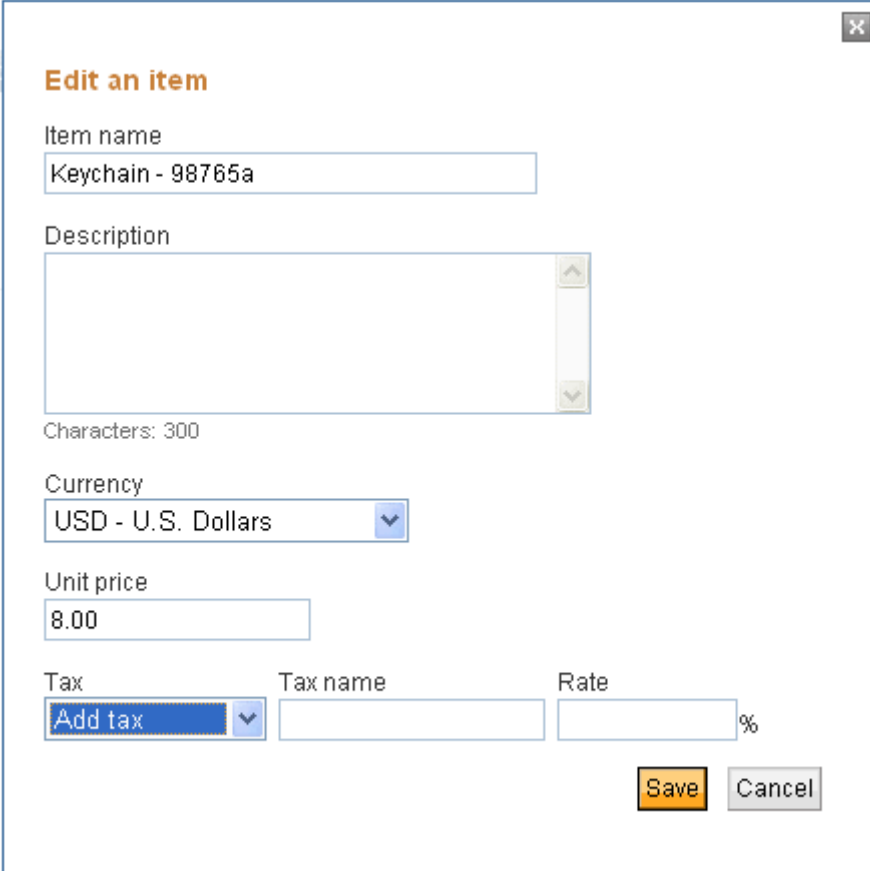
4. Click **Saved Items** in the **Invoice Settings** box at the left of the page.
5. Click **Add a new item**.

The **Add a new item** dialog box opens for a new item.

- Or -

Click **Edit** for an existing item.

The **Edit item** dialog box opens.



Edit an item

Item name
Keychain - 98765a

Description

Characters: 300

Currency
USD - U.S. Dollars

Unit price
8.00

Tax
Add tax

Tax name

Rate
 %

Save Cancel

6. Select **Add tax** in **Tax**.
7. Enter **Tax name**.
8. Enter **Rate**.

9. Enter or update any other information for the saved item.

10. Click **Save**.

The tax rate is saved with the item description. When you use this saved item in an invoice or template, the tax rate will be set automatically.

The new tax will appear in the **Tax information** page in **Invoice Settings**.

Editing Tax Information

If your tax information has changed, you can edit the tax in the **Enter your tax information** page. You can change the tax name, rate, or both fields. When you save the edited information, the tax is stored and will be available to all invoices created after the edit.

Editing a tax does not affect any invoices you already sent. However, you will see a warning message when you open a saved invoice, template, or saved item that uses the edited tax. The message prompts you to review and update the tax, if necessary. For example, if you edit a saved item that contains an changed tax rate, you will see a message at the top of the dialog box.

The previous tax for this item (CA Tax 9.75%) has been changed or removed. Please review the tax and update if necessary.

Edit an item

Item name
Mug - 65431

Description
12-ounce coffee mug with logo

Characters: 271

Currency
USD - U.S. Dollars

Unit price
10.00

Tax
No tax

Save Cancel

See [“Managing Templates” on page 94](#) for instructions on updating your templates and [Editing Saved Items](#) for instructions on updating saved items.

Editing a Tax

1. Log in to your PayPal account.
2. Click the **Request Money** tab.
3. Click **Invoice Settings**.

The **Enter your contact information** page opens.

4. Click **Tax information** in the **Invoice Settings** box at the left of the page.
5. Edit the **Tax name** to rename the tax.

6. Enter a percentage in **Rate** to change the tax calculation.
7. Click **Save**.

The edited tax is saved. When you create a new invoice, the edited tax appears the **Tax** or **Tax on shipping** drop down lists.

Deleting Tax Information

You can delete any tax in the **Tax Information** page. Deleting a tax does not affect any invoices you sent that used it. However, you will see a warning message when you open a saved invoice, template, or saved item that uses the deleted tax. The message prompts you to review and update the tax, if necessary.

See [“Managing Templates” on page 94](#) for instructions on updating your templates.

Deleting a Tax

1. Log in to your PayPal account.
2. Click the **Request Money** tab.
3. Click **Invoice Settings**.
The **Enter your contact information** page opens.
4. Click **Tax information** in the **Invoice Settings** box at the left of the page.
5. Clear the text in **Tax name**.
6. Delete the percentage in **Rate**.
7. Click **Save**.

The deleted tax no longer appears in the **Enter your tax information** list and no longer appears in the **Tax** and **Tax on shipping** drop down lists.

10

Invoice Administration

Managing invoices and maintaining invoice settings are on-going tasks. Invoicing lets you easily find, manage, and track your invoices and payments, allowing you to spend more time on your business instead of administrative tasks.

Keeping your **Invoice Settings** updated helps your invoicing tasks to run smoothly. When your invoice settings are current, you can create invoices quickly without having to leave the **Create a new invoice** page.

Read the following topics to learn more about invoice administration:

- [“Managing Your Invoices and Payments” on page 135](#)
- [“Maintaining Your Invoice Settings” on page 136](#)
- [“Adding Users to Perform Invoicing Tasks” on page 136](#)
- [“Invoicing and Reporting” on page 137](#)

Managing Your Invoices and Payments

The **Manage Invoices** page lists all the invoices you sent or saved. Use this page as the starting point to research invoices, perform actions, and review or update payment information.

When you need to research one or more invoices, use the **Manage Invoices** page to find them quickly. To help you find invoices, the **Manage Invoices** page contains basic and advanced filters. In **Basic filter**, you can use one of predefined filters to find paid, unpaid, past due, or unsent invoices. In **Advanced filter**, you can select filter options and date ranges to narrow the search. For example, you can use an **Advanced filter** to find all invoices sent to a specific email address.

In the **Action** column of the **Manage Invoices** page, you select options to cancel invoices, copy invoices, or send reminders to recipients. When you cancel an invoice or send a reminder, the recipient receives an email about the action.

You can view an invoice’s details by clicking its invoice number. The **Invoice details** page displays status information and a replica of the saved or sent invoice. From this page, you can print the invoice, send reminders, copy, or cancel the invoice.

The **Invoice details** page also provides a way to view payment information. For invoices paid with PayPal, the page contains a link to the **Transaction Details** for that payment. For payments made using other methods, you can record or update a recorded payment manually. The **Manage Invoices** page also provides an option to manually record payment.

For instructions on using the **Manage Invoices** page, see [“Managing Your Invoices” on page 35](#). For information on managing your payments, see [“Managing Invoice Payments” on page 63](#).

Maintaining Your Invoice Settings

Use **Invoice Settings** to store information to use during invoice creation. You can store your invoice contact information, your logo, tax information, invoice items and costs, invoice templates, and recipient contact information.

You can add or update your settings during invoice creation. However, if you have many items to add or update, it might be more efficient to use **Invoice Settings** to make the changes before creating an invoice.

Each invoice setting has its own page that you access from the **Invoice Settings** navigation box. For example, you add or update invoice item information in the **Saved items** page. When you are finished with one setting, you can select another from the **Invoice Settings** navigation box or go to another part of your account.

Use invoice templates to store items, payment terms, tax rates, shipping amounts, and discount information for invoices that you send frequently. Using custom templates saves time at invoice creation. See [“Working with Invoice Templates” on page 83](#) for more information.

Use the **Address book** to store contact information for your recipients. The minimum information is the recipient’s email address. You can also save optional information, such as name, company name, phone numbers, billing address, and shipping address. See [“Working with the Address Book” on page 103](#) for more information.

When you create invoices, all of your **Invoice Settings** are available for use. You can choose one of your stored templates to use as a starting point and modify it from there.

To read more about **Invoice Settings**, see [“Customizing Your Invoice Information” on page 69](#), [“Working with Saved Items” on page 119](#), and [“Managing Your Tax Information” on page 127](#).

Adding Users to Perform Invoicing Tasks

If you have a PayPal Business account, you can let people in your organization access your account by adding them as users and granting them specific access privileges. You can use this feature to assign invoicing tasks to one or more people. For example, you could assign the create invoices task to one user and assign the maintenance of **Invoice Settings** to another user.

PayPal invoicing contains controls to prevent multiple users from adding, updating, or deleting the same information at the same time. For example, two users open the same saved item. User 1 deletes it, while User 2 enters updated information. When User 2 clicks **Save**, an error message displays indicating that the item was deleted by another user.

To give users access to Invoicing, you add them to your **Account Profile** in **Manage User** and grant them **Request Money** access. **Request Money** access allows users to send invoices, send money requests, and add or update **Invoice Settings**. It is up to the account holder or administrator to assign specific tasks to users.

For information about adding users to your account, see the [Merchant Setup and Administration Guide](#).

Invoicing and Reporting

The **Manage Invoices** page displays the invoices you have sent or saved. Use the available filters to search for specific invoices. You can export invoice information and details by downloading invoice activity. See “[Exporting Invoice Information](#)” on page 49 for instructions.

In addition to reviewing invoice information on the **Manage Invoices** page, you can see your invoices in your **Account History**. You can use the available filters to search for invoices and download history information. For information about using **Account History**, see the [Merchant Setup and Administration Guide](#).

PayPal’s standard reports include invoice information. See the [Transaction Detail Report Specification](#) or one of the other PayPal reporting guides for more information.

