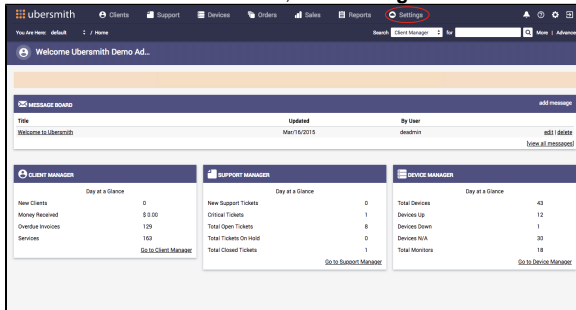


Configuring Invoice Notices

The Invoice Notices Settings page lists the available configuration settings for the Client Manager's invoice notices.

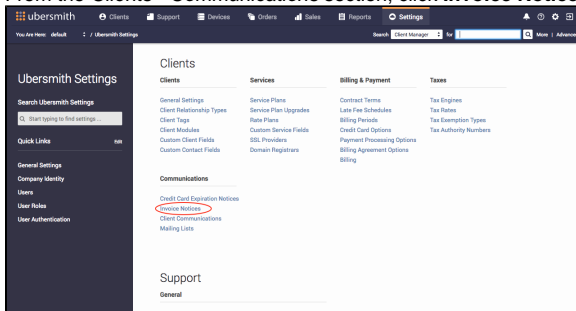
Access the Invoice Notice Settings Page

1. From the *Ubersmith Dashboard*, click **Settings**.



The *Settings* page appears.

2. From the *Clients - Communications* section, click **Invoice Notices**.

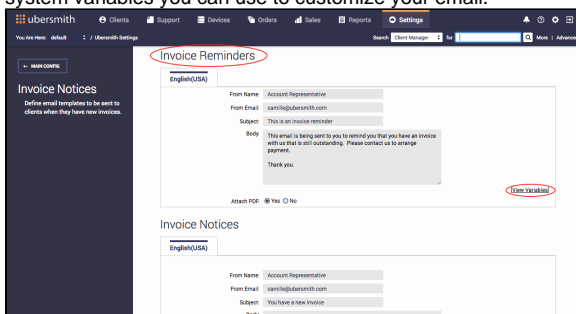


The *Invoice Notices* page appears.

Complete the Invoice Reminders Section

You can send your clients a customized email as a reminder to pay any outstanding invoices. Sending this notice is manual. See *Managing Invoices* for more information.

1. In the **From Name** field, enter the name the email is coming from.
2. In the **From Email** field, enter the address the email is coming from.
3. In the **Subject** field, enter the subject of the email.
4. In the **Body** field, enter the body of your message.
5. In the **Attach PDF** field, select **Yes** to attach the invoice PDF.
6. Click **View Variables** to display the *View Variables: Invoice Reminders* page which lists all the system variables you can use to customize your email.



Complete the Invoice Notices Section

You can send your clients a customized email that contains their invoice. This notice is automatically generated upon invoice generation.

1. In the **From Name** field, enter the name the email is coming from.
2. In the **From Email** field, enter the address the email is coming from.
3. In the **Subject** field, enter the subject of the email.
4. In the **Body** field, enter the body of your message.

On this page:

On this page:

- [Access the Invoice Notice Settings Page](#)
- [Complete the Invoice Reminders Section](#)
- [Complete the Invoice Notices Section](#)
- [Complete the Invoice Notices for Accounts with a Prior Balance Section](#)
- [Complete the Invoice Notices for Accounts with No Balance Section](#)
- [Complete the Overdue Notices Section](#)
- [Complete the Payment Received Notices Section](#)
- [Complete the Credit Generated Notices Section](#)
- [Complete the Account Statement Email Section](#)
- [Complete the Strong Customer Authentication Email Section](#)
- [Save Your Configuration Settings](#)
- [Related Topics](#)

5. Click **View Variables** to display the *View Variables: Invoice Notices* page which lists all the system variables you can use to customize your email.
6. In the **Attach PDF** field, select **Yes** to attach the invoice PDF.
7. In the **Send notices when invoice is automatically paid by credit card** field, select **No** to cancel sending this invoice email when the invoice is paid automatically.

Invoice Notices

English(USA)

From Name: Account Representative

From Email: carm@ubersmith.com

Subject: You have a new invoice

Body: This email is being sent in order to inform you that a new invoice has been generated for your account. If your account is set up to pay automatically by credit card, please disregard this notice. Please log in to view and/or pay it online.

Thank you.

Attach PDF: ☒ Yes ☐ No

Send notices when invoice is automatically paid by credit card: ☒ Yes ☐ No

[View Variables](#)

Invoice Notices for Accounts with a Prior Balance

English(USA)

From Name: Account Representative

Complete the Invoice Notices for Accounts with a Prior Balance Section

You can send your clients a customized email that contains their invoice if they have a prior balance on their account. This notice is automatically generated upon invoice generation.

1. In the **From Name** field, enter the name the email is coming from.
2. In the **From Email** field, enter the address the email is coming from.
3. In the **Subject** field, enter the subject of the email.
4. In the **Body** field, enter the body of your message.
5. Click **View Variables** to display the *View Variables: Invoice Notices* page which lists all the system variables you can use to customize your email.
6. In the **Attach PDF** field, select **Yes** to attach the invoice PDF.

Invoice Notices for Accounts with a Prior Balance

English(USA)

From Name: Account Representative

From Email: carm@ubersmith.com

Subject: Your account is past due

Body: This email is being sent in order to inform you that a new invoice has been generated for your account. Please log in to view and/or pay it online.

Thank you.

Attach PDF: ☒ Yes ☐ No

[View Variables](#)

Invoice Notices for Accounts with No Balance

English(USA)

From Name: Account Representative

From Email: carm@ubersmith.com

Complete the Invoice Notices for Accounts with No Balance Section

You can send your clients a customized email that contains their invoice with no balance due. This notice is automatically generated upon invoice generation.

1. In the **From Name** field, enter the name the email is coming from.
2. In the **From Email** field, enter the address the email is coming from.
3. In the **Subject** field, enter the subject of the email.
4. In the **Body** field, enter the body of your message.
5. Click **View Variables** to display the *View Variables: Invoice Notices* page which lists all the system variables you can use to customize your email.
6. In the **Attach PDF** field, select **Yes** to attach the invoice PDF.
7. In the **Send 'No Balance' notices** field, select **Yes** to send this invoice email even if your client does not have a balance on their account.

Invoice Notices for Accounts with No Balance

English(USA)

From Name: Account Representative

From Email: carm@ubersmith.com

Subject: This is not a bill. This email is being sent to inform you that your account is up to date and no payment is due at this time.

Thank you.

Attach PDF: ☒ Yes ☐ No

Send 'No Balance' notices: ☒ Yes ☐ No

[View Variables](#)

Overdue Notices

English(USA)

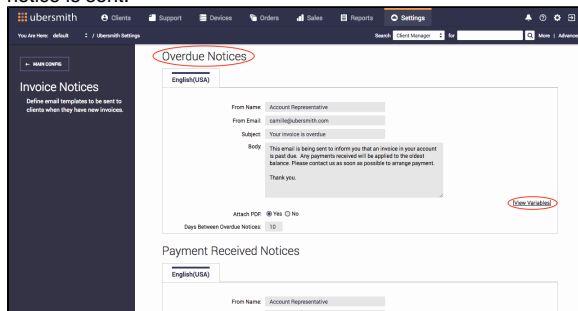
From Name: Account Representative

From Email: carm@ubersmith.com

Complete the Overdue Notices Section

You can send your clients a customized email reminder to pay any overdue account balances. This notice is automatically generated based on a specified schedule set in the **Days Between Overdue Notices** field.

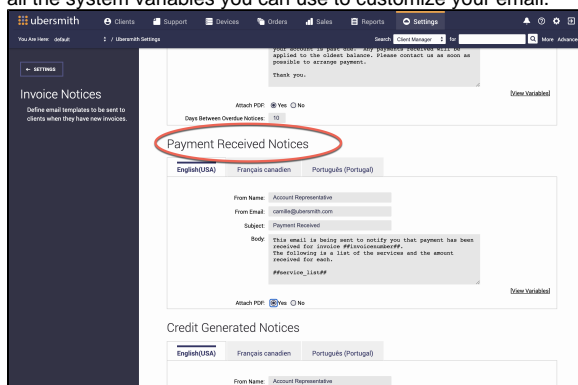
1. In the **From Name** field, enter the name the email is coming from.
2. In the **From Email** field, enter the address the email is coming from.
3. In the **Subject** field, enter the subject of the email.
4. In the **Body** field, enter the body of your message.
5. Click **View Variables** to display the *View Variables: Overdue Notices* page which lists all the system variables you can use to customize your email.
6. In the **Attach PDF** field, select **Yes** to attach the invoice PDF.
7. In the **Days Between Overdue Notices** field, enter the number of days to pass before the next overdue notice email is sent. This field also dictates the amount of time before the first overdue notice is sent.



Complete the Payment Received Notices Section

You can send your clients a customized email confirms the receipt of your client's account payment. If an invoice is paid automatically upon being generated, this notice is not available to be sent. This notice is automatically generated upon payment receipt.

1. In the **From Name** field, enter the name the email is coming from.
2. In the **From Email** field, enter the address the email is coming from.
3. In the **Subject** field, enter the subject of the email.
4. In the **Body** field, enter the body of your message.
5. In the **Attach PDF** field, select **Yes** to attach the invoice PDF.
6. Click **View Variables** to display the *View Variables: Payment Received Notices* page which lists all the system variables you can use to customize your email.



Complete the Credit Generated Notices Section

You can send your clients a customized email that confirms a credit was issued to their account. Sending this notice is manual once a credit is added. See Managing Invoices for more information.

1. In the **From Name** field, enter the name the email is coming from.
2. In the **From Email** field, enter the address the email is coming from.
3. In the **Subject** field, enter the subject of the email.
4. In the **Body** field, enter the body of your message.
5. Click **View Variables** to display the *View Variables: Credit Generated* page which lists all the system variables you can use to customize your email.

6. In the **Attach PDF** field, select **Yes** to attach the invoice PDF.

Credit Generated Notices

English(USA)

From Name: Account Representative
From Email: lending@ubersmith.com
Subject: An account credit has been added to your acc.
Body: An account credit has been added to your account. Please log in to view the details.
Thank you.

Attach PDF: ☒ Yes ☐ No

[View Variables](#)

Account Statement Email

English(USA)

From Name: Account Representative
From Email: lending@ubersmith.com
Subject: Account Statement

Complete the Account Statement Email Section

You can send your clients a customized email that contains your client's account statement. Sending this notice is manual. See [Managing Invoices](#) for more information.

1. In the **From Name** field, enter the name the email is coming from.
2. In the **From Email** field, enter the address the email is coming from.
3. In the **Subject** field, enter the subject of the email.
4. In the **Body** field, enter the body of your message.
5. Click **View Variables** to display the *View Variables: Account Statement* page which lists all the system variables you can use to customize your email.

Account Statement Email

English(USA) | Français canadien | Português (Portugal)

From Name: Account Representative
From Email: lending@ubersmith.com
Subject: Account Statement
Body: Please find your account statement. If you have any questions, please don't hesitate to contact me.

[View Variables](#)

Strong Customer Authentication required for 3D Secure 2.0

English(USA) | Français canadien | Português (Portugal)

From Name: Identical missing
From Email: lending@ubersmith.com
Subject: Your authentication is required to complete a
Body: An automatic payment has been tried for your invoice. Unfortunately it has failed because it requires your authentication. Please login to pay your invoice manually.

Complete the Strong Customer Authentication Email Section

You can send your clients a customized email that contains a request for them to login into their [Client Portal](#) to pay their invoice, which is required for 3D Secure 2.0. Sending this notice is automatic. See [Processing Credit Card Charges With Strong Customer Authentication](#) for more information.

1. In the **From Name** field, enter the name the email is coming from.
2. In the **From Email** field, enter the address the email is coming from.
3. In the **Subject** field, enter the subject of the email.
4. In the **Body** field, enter the body of your message.
5. Click **View Variables** to display the *View Variables: Strong Customer Authentication* page which lists all the system variables you can use to customize your email.

Strong Customer Authentication required for 3D Secure 2.0

English(USA) | Français canadien | Português (Portugal)

From Name: Identical missing
From Email: lending@ubersmith.com
Subject: Your authentication is required to complete a
Body: An automatic payment has been tried for your invoice. Unfortunately it has failed because it requires your authentication. Please login to pay your invoice manually.

[View Variables](#)

Save Your Configuration Settings

- Click **Update** to save your configuration settings.

The screenshot shows the UberSmith Settings page. The left sidebar has a 'Settings' button and an 'Invoice Notices' section with a description: 'Default email templates to be sent to clients when they have new invoices.' The main content area displays two email templates. The first template is for 'Invoice Notices' with fields for From Name, From Email, Subject, and Body. The second template is for 'Strong Customer Authentication required for 3D Secure 2.0' with tabs for 'English(USA)', 'Francais canadien', and 'Portuguese (Portugal)'. The 'English(USA)' tab is selected, showing fields for From Name, From Email, Subject, and Body. A red circle highlights the 'Update' button at the bottom right of the second template.

From Name: Account Representative
From Email: contact@ubersmith.com
Subject: Account Statement
Body: Please find your account statement. If you have any questions, please don't hesitate to contact me.
Save (disabled)

Strong Customer Authentication required for 3D Secure 2.0

English(USA) Francais canadien Portuguese (Portugal)

From Name: Identical missing
From Email: contact@ubersmith.com
Subject: Your authentication is required to complete a
Body: An automatic payment has been tried for your invoice. Unfortunately it has been declined. To ensure your authentication. Please login to pay your invoice manually.
Save (disabled)

Update

Related Topics

[Managing Invoices](#)

[Processing Credit Card Charges With Strong Customer Authentication](#)