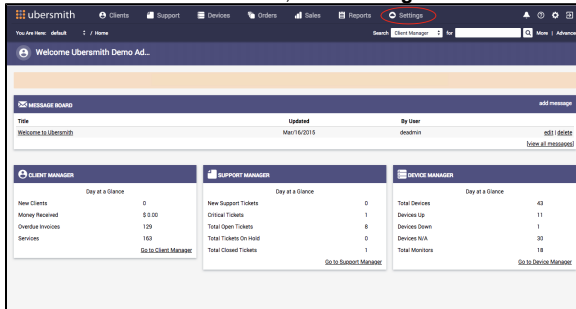


Configuring Billing Settings

This section defines default values for the various invoice configuration options. When a new client is added, the values entered here are automatically set in the client's account. These settings can be easily changed by editing the client's account. Changing the default settings here will not modify any existing accounts. This configuration is Step 4 of 4: Billing Configuration to the [Welcome Wizard](#).

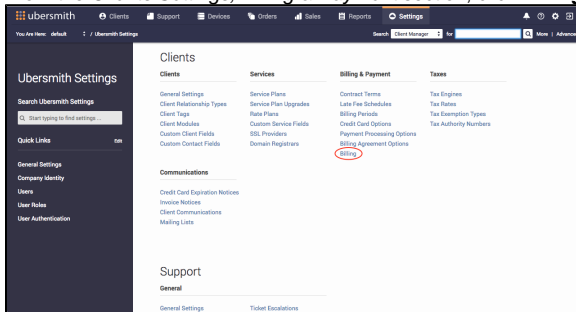
Access the Billings Settings Page

1. From the [Ubersmith Dashboard](#), Click **Settings**.



The *Settings* page appears.

2. From the *Clients Settings, Billing & Payment* section, click **Billing**.



The *Billing Settings* page appears.

Complete the General Billing Configuration Section

1. In the **Generate Daily or Monthly Invoices** field, select **Monthly** to generate invoices monthly or **Daily** to generate invoice every day. This setting is brand-wide and not passed to your clients when they are first created.
2. In the **Default Invoice Send Date** field, select **Use Client Creation Date** to send on the same day of the month that the client account was created, or **Use Specific Date [number]** to select the day of the month you want invoices to be sent.
3. In the **Invoice due dates determined by** field, select **Grace Period** to set a range of days to receive payment before it is considered late or **Static Due Date** for invoices to be due on a specific day. Static due dates are only available for clients in a brand using monthly invoicing.
4. In the **Default Grace Period** field, enter the number of days until invoices are due after being sent.
5. In the **Default Monthly Invoice Due Date** field, select the day of the month the monthly invoice is due.
6. In the **Default Pre-bill Period** field, select either **Do Not Pre-bill**, **Pre-bill services up to [number] of days after the invoice is generated**, or **Pre-bill services up to the due date of the invoice**. This field determines if any soon-to-start or renew services are included with the current invoice.
7. In the **Default Invoice Charge Date** field, select either **Immediately**, **After [number] days**, or **On Invoice Due Date**. This controls when Ubersmith automatically processes credit cards or ACH charges for the invoice.
8. In the **Default Late Fee Schedule** field, select a late fee. See [Adding Late Fee Schedules](#) to determine which ones are available.
9. In the **Date Range Display Style** field, select the date range style to either have the invoice date display as beginning on the first and ending on the first of the subsequent month or beginning on the first and ending on the last day of the same month.
10. In the **Default Renewal Date** field, select either **Do not auto-prorate**, **Auto-prorate to the [day]** of the month to provide a default day of the month that new clients should be configured to use for auto-proration, or **Auto-prorate to Client Creation day**. This determines how to pro-rate new services immediately upon being added. Note: In order for the auto-prorate functionality to work, there is a setting on the service plan that needs to be enabled. See [Adding Service Plans](#) for more information.

On this page:

On this page:

- [Access the Billings Settings Page](#)
- [Complete the General Billing Configuration Section](#)
- [Complete the Invoice Delivery Section](#)
- [Complete the Daily Invoicing Task Section](#)
- [Complete the Invoice Logo & Remit To Address Section](#)
- [Complete the Invoice Note Section](#)
- [Complete the Credit Note Section](#)
- [Complete the Disregarding Invoices Section](#)
- [Save Your Configuration Settings](#)
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11. In the **Prorate to the following month if next renewal is within [number] days** field, enter the number to specify a minimum number of days to prorate to the next month. This field enables when a pro-rate choice is made in the previous field.
12. In the **Automatically Apply Account Credits** field, select either **Automatically Apply to All Invoices**, **Automatically Apply to New Invoices**, or **Do Not Automatically Apply**. Credits to be applied to all invoices will be done during the nightly invoicing run.
13. In the **Process Scheduled/Retried Charges on Disputed Invoices** field, select **Yes** or **No**. If an invoice is disputed, selecting **No** will halt processing the payment. See [Adding and Managing Billing Disputes](#).

The screenshot shows the 'General Billing Configuration' page in the Ubersmith settings. The page is titled 'General Billing Configuration' and has a sub-header 'Define general invoicing attributes based on your billing practices'. The settings are organized into several sections:

- Generate Daily or Monthly Invoices?**: Set to 'Monthly'.
- Default Invoice Send Date**: Set to 'Use Client Creation Date'.
- Invoice due dates determined by**: Set to 'Usage Period'.
- Default Grace Period**: Set to '15' days.
- Default Monthly Invoice Due Date**: Set to '1'.
- Default Pre-bill Period**: Set to 'Do not pre-bill'.
- Default Invoice Charge Date**: Set to 'Immediately'.
- Default Late Fee Schedule**: Set to 'No Late Fees'.
- Date Range Display Style**: Set to 'May/01/2018 - Jan/01/2019'.
- Default Renewal Date**: Set to 'Do not auto-prorate'.
- Prorate to the following month if next renewal is within**: Set to '0' days.
- Automatically Apply Account Credits**: Set to 'Automatically Apply to All Invoices'.
- Process Scheduled/Retried Charges on Disputed Invoices**: Set to 'Yes'.

Complete the Invoice Delivery Section

1. In the **Available Invoice Delivery Options** field, select all appropriate methods to deliver invoices to your clients.
2. In the **Default Delivery Method** field, select **None**, **Email Only**, **Print Only**, or **Both Email and Print**.
3. In the **Clients Can Select Invoice Delivery Options** field, select **Yes** to allow your client's to select how they would like to receive their invoices.
4. In the **Email copy to Admin when sending invoices** field, select **Yes** to send a copy of the client's invoice to a user. Selecting **Yes** enables the Email address field.
5. In the **Email address to receive invoice copies** field, enter the user's email address to receive the invoice copy.

The screenshot shows the 'Invoice Delivery' page in the Ubersmith settings. The page is titled 'Invoice Delivery' and has a sub-header 'Configure invoice delivery methods for billing clients. "Email Only" is the default option.' The settings are organized into several sections:

- Available Invoice Delivery Options**: Set to 'None', 'Email Only', 'Print Only', and 'Both Email and Print'.
- Default Delivery Method**: Set to 'Email Only'.
- Clients Can Select Invoice Delivery Options**: Set to 'Yes'.
- Email copy to Admin when sending invoices?**: Set to 'Yes'.
- Email address to receive invoice copies**: Set to 'com@ubersmith.com'.
- Invoice Logo & Remit To Address**: The logo is 'Marshall Hosting' and the remit to address is 'Marshall Hosting, 1234 Broadway, Troy, NY 12108'.
- Select Title Graphic/Logo**: Set to 'Choose File - No file chosen'.
- Remit to Address**: Set to 'Marshall Hosting, 1234 Broadway, Troy, NY 12108'.
- English(US) Invoice Title**: Set to 'Invoice'.

Complete the Daily Invoicing Task Section

This section checks to see if daily invoicing has completed after a specified time you set.

1. In the **Send notification email after** field, select the time to check if daily invoicing has completed. **Never** will not check for completion, **[minutes] minutes** will check the number of minutes you enter, with five being the minimum value, and **[hours] hours** will check the number of hours, in five-minute increments you enter.

2. In the **Email address to receive notification** field, enter the email address to receive a notification that daily invoicing has not completed. You will also receive a subsequent email when invoices has completed.

Complete the Invoice Logo & Remit To Address Section

You can upload your company's logo to include on your invoice. Accepted file formats are GIF, JPG and PNG, but JPG is recommended. The default size limit is 2 mb.

1. In the **Select Title Graphic/Logo** field, click **Choose File** and navigate to the location your logo graphic is saved.
2. In the **Remit to Address** field, enter the address invoice payments are to be mailed.
3. In the **Invoice Title** field, enter the title of your invoice.

Complete the Invoice Note Section

A customized, default credit note displays on invoices in the Notes section.

- In the **Invoice Note** field, enter the text you want to appear on your invoice.

Complete the Credit Note Section

A customized, default credit note displays on credit notices in the Notes section.

- In the **Credit Note** field, enter the text you want to appear on your credit notice.

The screenshot shows the 'Billing' settings page in Ubersmith. The 'Credit Note' section is highlighted with a red circle. It contains a text area for the credit note body and a 'Credit Note' field with a placeholder 'You have received a credit to your account.' Below it is the 'Disregarding Invoices' section with a radio button set to 'No'.

Complete the Disregarding Invoices Section



Important

Disregarding invoices creates an unbalanced accounting report, when there is no credit or payment transaction to balance it out. By default disregarding invoices is disabled. If you have a valid business need for it, you can enable it.

Instead of disregarding invoices, Ubersmith's recommendation is to issue an account credit for the amount that is being forgiven. You would then apply the credit to the invoice, which is not recorded as money having been received, so your reporting will remain balanced.

- In the **Allow staff member to disregard invoices** field, select **Yes** to enable the function.

The screenshot shows the 'Billing' settings page in Ubersmith. The 'Disregarding Invoices' section is highlighted with a red circle. It contains a text area for the credit note body and a 'Credit Note' field with a placeholder 'You have received a credit to your account.' Below it is the 'Disregarding Invoices' section with a radio button set to 'No'.

Save Your Configuration Settings

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

The screenshot shows the 'Billing' settings page in Ubersmith. The 'Update' button is highlighted with a red circle. It contains a text area for the credit note body and a 'Credit Note' field with a placeholder 'You have received a credit to your account.' Below it is the 'Disregarding Invoices' section with a radio button set to 'No'.

Related Topics

[Configuring the Welcome Wizard](#)

[Configuring Company Identity](#)

[Configuring Credit Card Options](#)

[Configuring Payment Processing Options](#)

