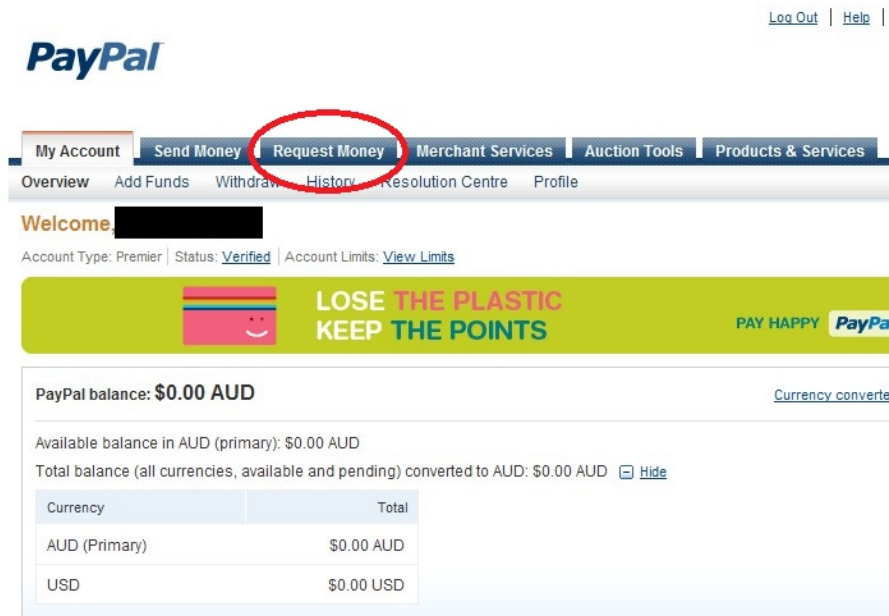


Creating a PayPal Invoice

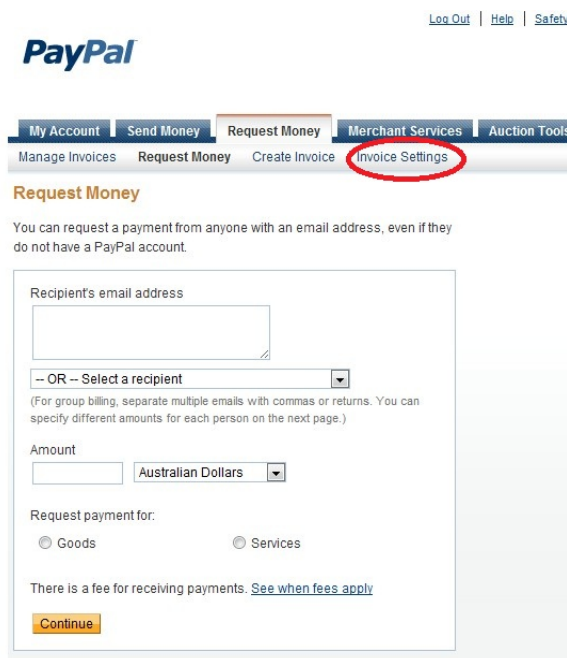
Creating an invoice from your PayPal account is fairly easy to do.

If you follow the steps below it should get you started and able to successfully create and send a professional-looking invoice to your clients.

Step 1: Log into your PayPal account and then click on the “Request Money” tab as shown below.



Step 2: You will be then taken to a page which looks something like the following:



Now click on “Invoice Settings” as shown circled above.

Step 3: This will take you to a screen like the following:

PayPal

LOG OUT | HELP | SAFETY ADVICE

My Account | Send Money | Request Money | Merchant Services | Auction Tools | Products & Services

Manage Invoices | Request Money | Create Invoice | Invoice Settings

Enter your contact information [Manage Invoices](#)

Invoice Settings

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

Enter the contact details that will appear on your invoices. You don't have to complete all the fields.

To edit your address, phone, or email, [go to your PayPal Profile](#).

Business name

First name

Last name

Address

Don't show on invoice

Phone

Don't show on invoice

Fax

Email

Website

Additional information

For example, your account number

Save

1

2

Enter your details and then click the save button.

The details you enter here will appear on your invoice. Another thing to note is that not all the fields are mandatory, so if you wish to just enter your company name and not your first and last name you can do that too.

Step 4: Next click on the “**Invoice logo**” link as shown circled below as number 1.

This will take to you a page which will allow you to upload your company logo.

As you can see from the example I have uploaded a 75x75 jpeg logo image.

After you've uploaded the image click the "Agree and Save" button.

So that's all we will do as far as our invoice settings go and now we're ready to create an invoice and send it to a client.

To move onto the next step, click the "Create Invoice" menu link as shown circled above with number 4.

Step 5: To create an invoice you will need to enter various details pertinent to the payment you wish to request.


The image below shows the page where we will construct our invoice and where we will specify our recipient and the total cost for the payment requested and some notes regarding the payment.

Create a new invoice


Secure 

Select a template to start PayPal default template (default) [Invoice settings](#)

Your contact information




[Change logo](#) | [Remove logo](#)


.com


[Edit contact details](#)

Invoice information


Invoice number [Learn more](#)
2012-INV144 1


Invoice date [Learn more](#)
26/6/2012 

Payment terms [Learn more](#)
Due on receipt 


Due date
26/6/2012 







Send to

[Address book](#) 

Recipient's email address
@yahoo.com

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



Select currency USD - US Dollars 

Item name/ID	Date	Quantity	Unit price	Tax	Amount
Test Invoice	26/6/2012 	1	100	No tax 	\$ 100.00
This is just a test invoice for services rendered. Save item Delete row 					
		1		No tax 	\$ 0.00
Description (optional) Delete row 					

Terms and conditions
For example: your return or cancellation policy

Characters: 1000

Note to recipient
I will begin work as soon as I receive payment.
Thank you,
John Smith
Characters: 931

Subtotal \$ 100.00
Discount \$  \$ 0.00
Shipping/handling \$ 0.00
Tax on shipping No tax 
Other (specify) \$ 0.00
Total \$ 100.00

Memo (your recipient won't see this)
Characters: 150

[Send](#) [Preview](#) [Save Invoice](#) [Save as Template](#) [Close](#)

From above we can see that we will need to enter the following things:


- 1) Invoice number: This can be anything you wish or you can leave it as default. Sometimes companies like to add a prefix to their invoice numbers or maybe they wish to start the count from a certain number.

- 2) Select currency: Here you can select from a range of supported currencies.
- 3) Enter the name of the item or service you are requesting payment for.
- 4) Enter the date of the invoice.
- 5) Enter the quantity for the items or service purchased.
- 6) Enter the amount you wish to charge for the item or service.
- 7) You can optionally enter a small note or comment describing the product or service.
- 8) Enter a note to the recipient reminding them about why they might be receiving this invoice.
- 9) When you're done entering the required details, click on the **"Preview"** button to see how your invoice will look when the recipient receives it.

Upon clicking the preview button you will see something like the following:

Preview invoice [Secure Transaction](#)

Send Edit Print

 **INVOICE**

Invoice details:

Invoice number	2012-INV144
Invoice date	26/6/2012
Payment terms	Due on receipt
Due date	26/6/2012

Bill To
[Redacted]@yahoo.com

Date	Description	Quantity	Unit price	Amount
26/6/2012	Test Invoice - This is just a test invoice for services rendered.	1	\$100.00	\$100.00

Note to recipient
I will begin work as soon as I receive payment.
Thank you,
John Smith

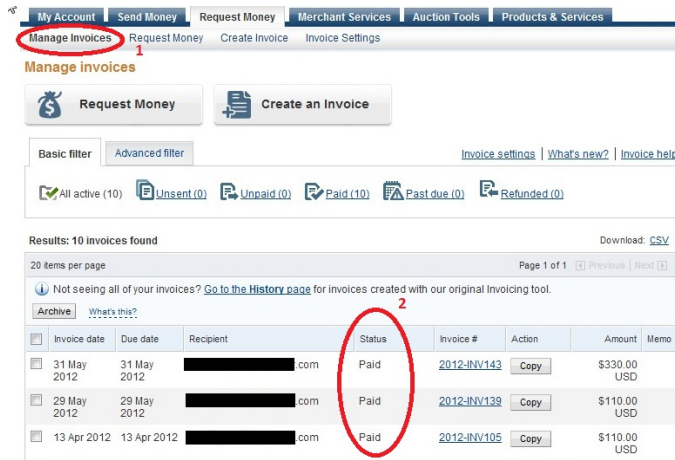
Subtotal	\$100.00
Total	\$100.00 USD

Send Edit Print

As you can see from above, the invoice looks quite professional and pretty good for a couple of minutes' worth of effort.

Step 6: If you're happy with your invoice, you can dispatch it via email by clicking the "Send" button shown circled above.

As soon as the invoice has been paid you will be notified via email and the invoice will be marked as "paid" when you view it via the "Manage Invoices" page as shown below:



Another interesting and useful feature is that if you have customers who like to operate "offline" and submit payments via cash in person or check, you can simply print a pdf copy of the invoice you created and give them the document. Once they've paid for the invoice you can manually mark it as paid from your PayPal account in your "Manage Invoices" page as shown below:



Summary

So there you have it. A simple, free and yet professional-looking invoice tool you can use right from your PayPal account.