Billing and Invoicing
Customer FAQs

General Questions

What is Billing and Invoicing?
Billing and Invoicing is a new feature on Converge that allows you to send quotes or invoices directly to your customers via email. Your customers will be able to accept or reject quotes or pay invoices by using Converge's secure online payment page.

Why should I consider Billing and Invoicing on Converge for my business?
This feature helps you save time and it provides your customers with a secure way to pay you quickly and easily. With Converge, you are not limited to the number of quotes or invoices you can send per month. Send as many quotes or invoices as you need, and send them to any number of customers that you need to bill.

With Converge, you're also empowered to accept payments in a variety of other ways as well. This is one feature in an omni-commerce product designed to help you run your business better.

How does Billing and Invoicing work?
Sending an invoice through Converge is quick and easy.

1. Use the Converge Invoice and Quotes feature to create a new invoice. Fill out all of the invoice details including price, taxes, and payment terms. When you're ready, click "Send."

2. Your customer will receive an email with a PDF attached and a clickable button to pay the invoice online.

3. The "Pay Invoice" button takes your customer to a secure payment page where the invoice details are auto-populated. Your customer can make a quick and easy payment online using their card of choice.

4. Confirmation of the payment will be shown in Converge as soon as the payment is made. You can also enable email notifications to receive immediate updates.

What do I need to get started?
Billing and Invoicing is a feature of Converge. In order to get started, you'll need to have an active Converge account that is enabled with tokenization. Your Elavon contact will help you submit the application if necessary.

How will my customers benefit from this product?
Your customer can pay invoices quickly and easily online. Once they click to pay the invoice, they'll be routed to a secure payment page that Converge manages and hosts. They'll see your business logo, or any other personalized touches that you designed so they're comfortable their payment is going to the right business. Once the payment is made, your customer will see the balance on the page goes to $0.00 and they'll receive an email notification that the invoice is paid.

What other payment options are available on Converge that I should consider?
Converge is an omni commerce payment platform and we pride ourselves on being able to adapt to the ever evolving payments landscape. Aside from Billing and Invoicing, we also help businesses accept payments:

1. Online
2. In-store
3. In-office
4. On-the-go with our mobile POS
5. In-app with our API

Converge empowers your business to accept payments nearly anywhere. We work together with your team to handle customer needs including processing funds, void transactions, and accepting payments wherever your business does business.

How does Billing and Invoicing work with the other Converge terminals I have in my business?
Billing and Invoicing essentially functions like any other payment terminal. Once it's added to your account, you'll be able to authorize certain users within your business to send quotes or invoices to your customers. Once payments are settled, you'll see the invoiced settlements along with payments made by any other terminal in your business, which can be found in the reporting dashboard.

What does the quote feature do?
Some businesses prefer to send their customers quotes before they begin work on a project. If this is how you like to do business, then Billing and Invoicing provides you with a simple and secure way to follow up with your clients directly. Your clients will receive an email with your personalized quote and they can choose to accept or reject it. If accepted, the quote will automatically be converted to an invoice.

As a business, you'll be able to see which quotes were accepted/rejected in the reporting dashboard within Converge.

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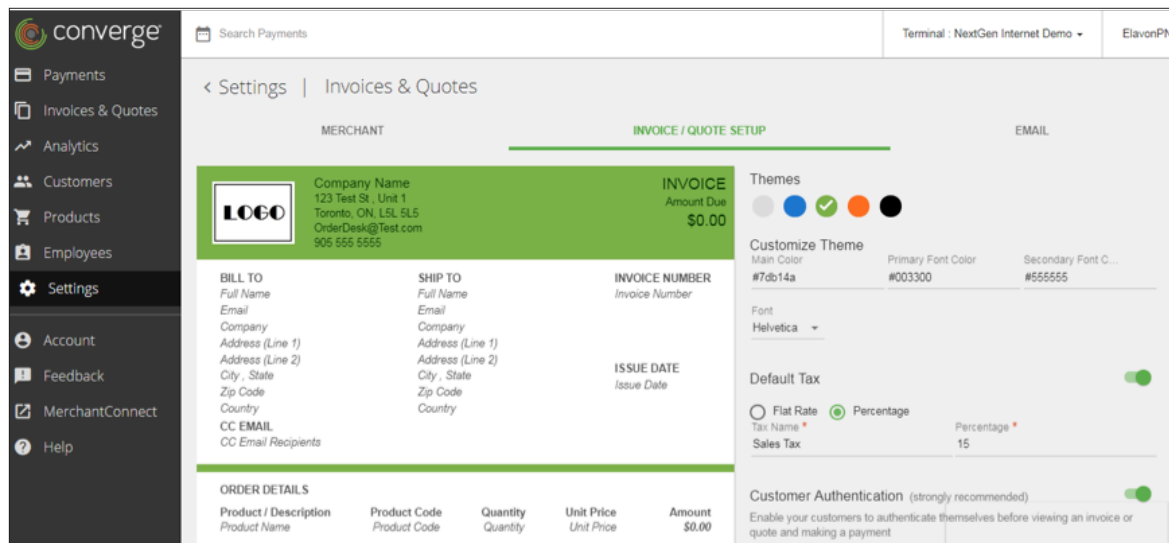
Invoice Set Up Screen

Do I need to send a quote before I send an invoice?
No. You can send invoices without sending a quote first. Quotes are an optional feature.

If I already have Converge, do I need to pay any additional fees to get Billing and Invoicing?
Yes. Converge Billing and Invoicing is a value added feature.

How do I sign up for Billing and Invoicing?
Please contact us to sign up for Converge Billing and Invoicing or to add this feature to your existing Converge account.

Getting Started

What do I need in order to set up Billing and Invoicing on Converge?
You'll need to be approved for Converge and have tokenization enabled for your account. Converge is a virtual terminal. This means you'll need a computing device with internet access in order to use this product. You can access Converge from a computer, laptop, tablet, or smartphone with your login credentials.

How long does it take to set up Billing and Invoicing on Converge?
Whether you're a new customer or an existing customer, getting set up with Billing and Invoicing is quite easy. Once your business application is approved, you'll work with our activation team to be trained on Converge and to set up your Converge account. During this process, you'll also set up your Billing and Invoicing templates.

How can I personalize the payment page to match my brand?
The Invoice and Quotes screen within Converge empowers you to make some customizations on the payment page such as adding your logo, modifying your company's information and even adjusting the email content that gets sent out. Please contact your Elavon representative in order to see a full demonstration of this feature's personalization options. (See above for Invoice Set-up Screen)

How can I update the payment page after I deploy the feature?
You can update the personalization options within this feature at any time. Once you save the updates, customers will see your new content the next time they interact with your business through this feature.

What can I customize on the payment page?
Within Converge, you can set up the invoice/quote template by adjusting the colors, font, as well as, enable customer authentication, set default tax, set due dates and more.

Daily Use

What do my customers need to do in order to pay an invoice?
Your customers can provide their email address to receive the quote or invoice directly from Converge. They can go on to accept or decline the quote or pay the invoice from any device with internet access. Alternatively, you can also generate an invoice for record keeping purposes and provide your customers a payable link that can be sent via your business's email account.

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How many email addresses can an invoice be sent to?
Converge enables you to send an invoice to a primary person and cc up to 3 other email addresses to make it easy for your customers to receive the invoice in their normal billing inbox, as well as their business inbox.

What happens if my customer replies to the auto-generated invoice email?
To help ensure you don't miss any correspondence from your customers, the reply email will be sent directly to the email address you have on file in your Converge settings.

Can I refund paid invoices?
Yes. Once the invoice is paid and settled, you'll be able to refund an invoice. Refunds will be credited back to your customer's card. If the payment is awaiting settlement, then you can void the payment by accessing the current open batch.

Can my customers accidentally pay an invoice twice?
No. We've built this feature to show the balance as $0.00 once it's paid. If your customer accidentally clicks on an old email, they'll see that there is nothing to pay.

Is it possible to send recurring invoices?
Not at this time. This is a feature slated for a future release.

Can I save payment data when a customer pays their invoice?
Yes. Converge securely stores tokenized card information in our Customer Manager feature. When a customer makes payment after receiving an invoice, their information will be automatically captured in your Converge Customer Manager section. This will make it easy for you to bill the customer in the future.

Can I create an invoice but send it at a later time?
Yes. You can send invoices immediately, or up to six months from the date you create the invoice by using our Post-dating feature to schedule the invoice.

Can I adjust the Sales Tax for each invoice?
Yes. Converge enables you to adjust the sales tax for each invoice. You can set up a default sales tax if most of your transactions carry the same sales tax.

Can I customize each invoice with additional notes and terms?
Yes, Converge enables you to add notes, caveats, legal, and invoice terms to each invoice as necessary.

Can I bill customers in a different currency?
Yes. Converge allows you to bill customers in 91 currencies, and be funded in your currency. We take care of the currency conversion for you. You'll just need to have Multi-currency support enabled for your account.

Currencies available include:

- Australian Dollar (AUD)
- Canadian Dollar (CAD)
- Euro (EUR)
- Pound Sterling (GBP)
- Japanese Yen (JPY)
- US Dollar (USD)

Can I archive past invoices?
Yes. Converge offers an archive folder which allows you to store invoices that don't need your immediate attention for up to 1 year.

What is a hosted invoice payment page?
A "hosted invoice payment page" is what your customers see when they go to pay your invoice. The payment page is called "hosted" because it's stored and managed on Converge's secured servers. Providing your customers this important security perk means that your customers' payment information never touches your website, computer, or servers. Everything is owned and stored by Converge.

What happens when the customer clicks to pay the invoice from their email?
You can elect to have an authorization page to prevent the invoice being viewed by unauthorized users. Options include:

- First Name
- Last Name
- Phone Number
- Customer ID

LOGO

Company Name has sent you an invoice
To view the invoice, enter the following information

Last Name *

Email Address *

CONTINUE

ENGLISH ▾

converge®

Customer Authorization Page

Can I send an invoice to a different payment page?
No. Converge Billing and Invoicing intentionally sends customers to a dedicated Converge hosted payment page for two reasons:

1. The page is secured and managed by Converge which offers you and your customers additional security protection. The page is encrypted and maintained on Converge's secured servers which means your customer's payment information never touches your website, computer or servers.

2. When a customer pays your invoice, their information is captured and stored in Converge for easy future billing. The product is designed to be a closed loop payment product which works to save you time when billing the customer in the future.

How do I get funded when customers pay via online invoice?
Once a payment is successfully made, you'll see the invoice payment in your current batches dashboard. The payment will be batched and settled according to your business's designated settings. Once batched, you can expect your payment by the next business day in most cases.

How will accepting payment via invoicing affect my monthly fees?
Invoicing is an added service, so you will see an additional charge each month you use Invoicing on top of your Converge gateway fee.

Can I invoice customers for services as well as for products?
Yes. You can invoice customers for any relevant business service or product. Simply add your service or products to the Product Catalog to make invoicing simpler. Or, if you prefer to fill each invoice out individually with custom services or products, then you can do that too. Simply add them on when you create your invoice.

Can I send quotes or invoices from my mobile device?
Yes, you'll need to login to your Converge account to do so. Android devices can use the Converge Mobile app to send an invoice. iOS devices will need to use use the phone's web browser to log into Convegre.

Can I add notes to an invoice?
Yes. Each member of your staff can add notes to invoices which will be automatically time stamped and will include their user name for easy tracking.

Are notes editable?
Converge allows you to edit your own notes, but not the notes of others.

Do I have to send an email every time I create an invoice?
No. Converge enables you to turn off the mandatory email requirement in the event you want to send the invoice by mail or if you need to save an invoice so that you can come back to it later and send it out then.

Does the feature automatically send receipts to customers after their invoice is paid?
Yes, you'll need to set this feature up in your Converge settings.

Can customers pay their invoice in person?
Yes. There is currently not a way to mark that invoices are paid in person. We expect this enhancement to be available in July 2019.

How will I be notified that an invoice has been paid?
Invoices will be marked as "Paid" in Converge when your customer finalizes a payment. You can also customize your business settings to receive emails upon each paid invoice.

What email address will the quotes and invoices appear to be from when I send it through Converge?
You can customize this during the Billing and Invoicing set-up process.

What reporting is available with this feature?
On the Quote and Invoice page, you'll be able to see which quotes have been accepted and declined. You'll also see which invoices have recently been paid or are still outstanding based on the time period you allotted.

Can I download paid invoices into a .csv file?
Yes. The invoice number associated with a paid invoice can be displayed in any downloadable report after the payment is settled.

Can I remove Billing and Invoicing after I add it?
Absolutely. If Billing and Invoicing is not the right solution for your needs, please contact our customer support line to have the feature removed from your Converge account. Doing so will not affect your ability to continue using Converge in the rest of your business. Please note, that removing quotes and invoicing will mean you will also lose access to view past quotes or invoices. Invoices that have been paid will remain on your Converge account in your settled batches.