Invoice Image Data

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Exciting news! Our ConnectBooster Support documentation is moving to a new location. Be sure to bookmark the new link below.

https://help.cb.kaseya.com/help/Content/0-HOME/Home.htm

Select Default Invoice PDF

This setting allows you to set a preference **hierarchy** that the system will follow for various portal functions.

The primary function drives *which invoice copy* clients can *view & print out*.

- I.e., the line-item detail, as it occurs from the source system. This is typically in PDF format, when available.
- *The invoice dollar amount clients **PAY** against in the portal will **ALWAYS** originate from your accounting software integration, regardless of the image setting.*

The Invoice Image options available depend on your connected **integrations**, and the vendor's native API support.

Accounting, & CRM/PSA Integrations with Invoice Images:

- Autotask
- ConnectWise
- Custom (Example, Datagate, or another purpose built image provider)
- Kaseya BMS
- Microsoft Dynamics GP
- Microsoft Business Central D365
- QuickBooks Online
- Sage Intacct
- Xero

When you or a client tries to view the invoice on the portal, this is the version of the invoice we will attempt to display.

In the example below, the first position #1 is Autotask.

Invoice Image Data

Source Data (Reorder with highest priority on top)

1 ⠿ ☑ Autotask (eqvorv5rogs4pkx@connectboosterdemo.com) 📄PDF

2 ⠿ ☑ QuickBooks Online (1020008035) 📄PDF

Additional Options

☐ Show memo description notes

☐ Add as attachment to emails ⬅

If the 1st option is not found, the system will fallback to the second selected option (if one exists).

- In this case, #2, the version from QuickBooks Online.

Note: QuickBooks on premise (desktop) versions do not have the ability for us to pull the identical invoice copy.

- We will do a best attempt to render the invoice based on our interpretation of the data.

Additional Options

Show memo description notes:

Only applicable to QuickBooks Desktop users. When enabled, we will display the memo field on the *rendered* version of the QuickBooks invoice. This may not display if another integration's invoice image preference supersedes QuickBooks.

Add as attachment to emails:

This setting includes the PDF copy (based on the above preference) on certain **client facing emails**, if they are enabled.

The emails that can include the invoice attachment are:

Past Due/Before Due Notices

"New Invoice" (Delivery) Notifications