

ezytax  
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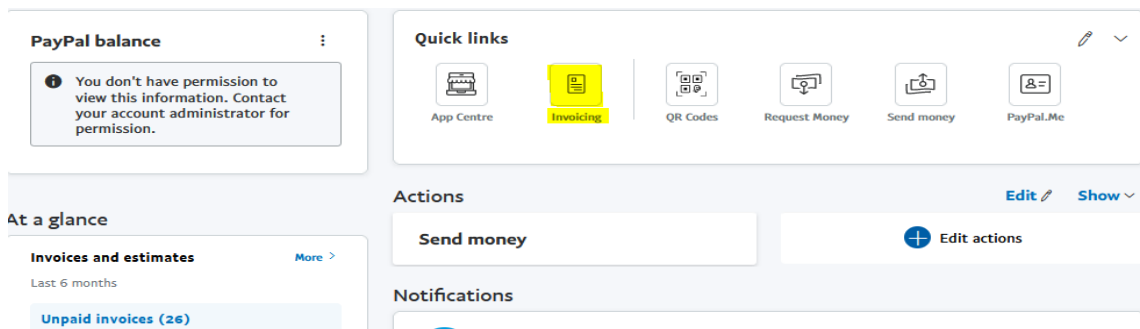
paypal



# PAYPAL MANUAL

PayPal can be used to send clients invoices to be paid if they are unable to attend or pay at the booth. Mostly used for email clients.

1. Log on via <https://www.paypal.com/au/business> using the **Log In** button in the top right. Username: **EzyTaxTsv** PW: **TBA**
2. Once you are logged in > select **Invoicing** from the top row of options



3. Now press **+Create Invoice** in the top right of the screen.
4. Before you do anything, enter the invoice number in the box on the right labelled **Invoice Number**. Invoice number will auto generate based on the last invoice number used but you may be using a different station code so always check.

My templates

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Frequency

Invoice number

Invoice date

Reference

Due date

[+] Your business information [Edit](#)

5. Once you have double checked the invoice number to be sent, enter the client's email address (this is where the client will be notified of the invoice)
6. Similarly to the invoice template, the PayPal invoice has been preloaded with commonly used invoice items such as Tax Returns, Additional Fees, ABN Registration etc. Enter all that apply and triple check that nothing is missing/needs

to be removed.

Description	Amount	Tax	
Individual Income Tax Return	62.73	GST : 10%	⊗
2020 Individual Income Tax Return			
Business Income 1	60	GST : 10%	⊗
Item 15 - Sole Trader with Gross Income less than \$75,000 with no employees			
Company ITR 1	400	GST : 10%	⊗
Company Tax Return & Financials with Gross Income less than \$75,000 with no employees			
			Update item Add row
Item name	0.00	No tax	⊗
Enter detailed description (optional)			

7. You may notice an additional line which is blank. Be sure to remove this using the **X** icon before sending to client. This won't affect the invoice but it looks unprofessional and incomplete.

8. Finally, scroll to the bottom of the invoice and paste the invoice number into the highlighted **Ref** as seen below:

<input type="checkbox"/> Allow partial payment. ⓘ	
<input type="checkbox"/> Allow customer to add a tip.	
<b>Note to recipient</b> If you prefer to pay via bank transfer: BSB: 084472 A/c Number: 842750190 A/c Name: Streamline CA Pty Ltd Ref: [InvoiceNumber]	<b>Terms and Conditions</b> Estimate: Please note that this is our estimate of your assessment which may be subject to Tax Office adjustment for HECS-HELP, spouse's FTB overpayment or exceeding your concessional or non-concessional superannuation contributions cap in 2018 or 2019 (if applicable). A Notice of Assessment from the Australian Taxation Office will be forwarded to you at a
3871	2704

9. Hit **Preview** at top of the invoice and do one final check that the **invoice number, items and email address** are correct.

Help Invoicing feedback

book  
information  
nation

Preview Send Save as Draft

Last saved at 1:25 PM

10. If all is correct and invoice total matches SS hit send. Be sure to record that a PP invoice was sent on your SS. Check back regularly to see if payment has been received. If client pays by Direct Debit using attached bank details it will post in #ezy\_emails Slack channel.