

Quick Payable

Customization Guide V2.0

Last Updated Date: 05/07/2026

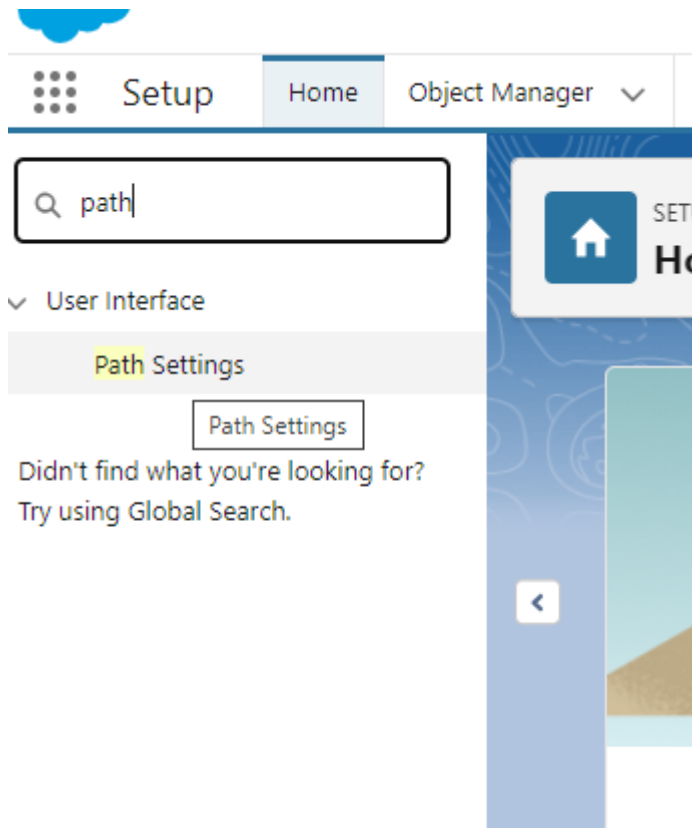
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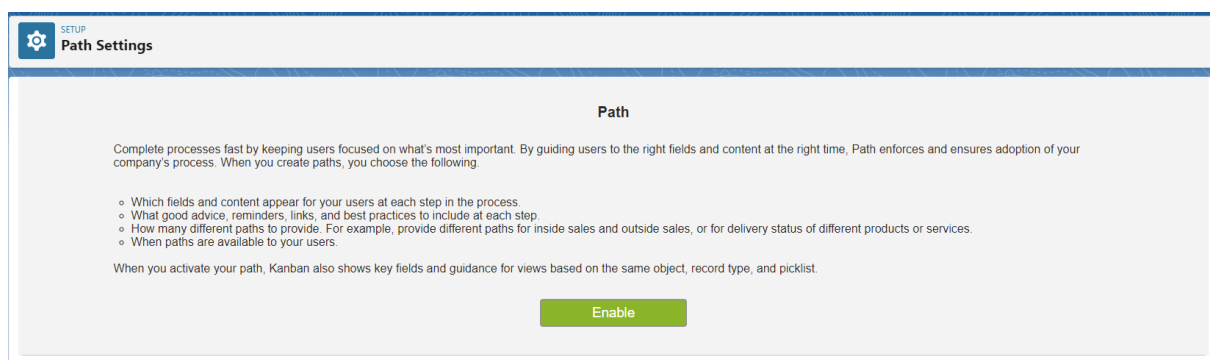
Q1. How can you activate the status path for Invoice?

Step 1: Go to Setup

Step 2: Find “Path Settings” and click on it



Step 3: Click on Enable



Step 4: Once you enable the path, it starts showing you the configured path for the invoice.

Path Settings

Path

Complete processes fast by keeping users focused on what's most important. By guiding users to the right fields and content at the right time, Path enforces and ensures adoption of your company's process. When you create paths, you choose the following.

- Which fields and content appear for your users at each step in the process.
- What good advice, reminders, links, and best practices to include at each step.
- How many different paths to provide. For example, provide different paths for inside sales and outside sales, or for delivery status of different products or services.
- When paths are available to your users.

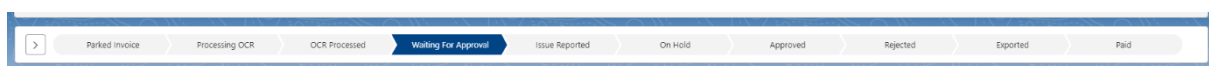
When you activate your path, Kanban also shows key fields and guidance for views based on the same object, record type, and picklist.

New Path

Path Name	Active	Object	Record Type	Action
Invoice status	☒	Payable Invoice	Payable Bill	Delete Edit Deactivate

Disable Path

☐ Remember user's Path preferences



Q2. How to create an Email Service?

Step 1: Go to Setup

Step 2: Find “Email Services” and click on it

Setup

Home

Object Manager

Email

Send through External Email Services

Custom Code

Email Services

Email

Email serv
more ema

Didn't find what you're looking for?
Try using Global Search.

Step 3: Click on the button “New Email Service”

SETUP
Email Services

Email Services

Email services are automated processes that use Apex classes to process the contents, headers, and attachments of inbound email. For example, you can create an email service that automatically creates contact records based on contact information in messages. Each email service has one or more email service addresses that can receive messages for processing.

Before creating email services, create Apex classes that implement the `Messaging.InboundEmailHandler` interface.

```
global class myHandler implements Messaging.InboundEmailHandler {
    global Messaging.InboundEmailResult handleInboundEmail(Messaging.InboundEmail email, Messaging.InboundEnvelope envelope) {
        Messaging.InboundEmailResult result = new Messaging.InboundEmailResult();
        return result;
    }
}
```

View: **All** [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Active	Email Service Name	Apex Class	Last Modified By	Last Modified Date
No records to display.				

Step 4: Fill out the forms as the below

Email Service

Email services let you use Apex classes to process the contents, headers, and attachments of inbound email. Use the settings below to create an email service. After saving, create one or more email service addresses to receive messages for processing.

Email Service Information

Email Service Name:

Apex Class:

Accept Attachments:

Advanced Email Security Settings: ☐

Accept Email From:

Convert Text Attachments to Binary Attachments: ☐

Active: ☒

Failure Response Settings

Configure how salesforce.com responds when an attempt to access this email service fails for the reasons shown below.

Over email rate limit action:

Deactivated Email Address Action:

Deactivated Email Service Action:

Unauthenticated sender action:

Unauthorized sender action:

Enable Error Routing: ☐

Route Error Emails to This Email Address:

Apex Classes - Salesforce - Enterprise Edition - Google Chrome

Lookup

You can use " as a wildcard next to other characters to improve your search results.

< Clear Search Results

Search Results

Name	Namespace Prefix	Api Version
ParseEmailInvoice	dgp	55
ParseEmailInvoiceTest	dgp	55

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- You can give any name to “Email Service Name”
- You must have to select the “ParseEmailInvoice” Apex Class as shown above
- You must have to select “All” in the “Accept Attachments” dropdown
- You must have to specify the domain from which you want to accept an email
- You must select the checkbox for “Active”

Step 5: Click on “Save and New Email Address”

- You can write any name to “Email Address Name”
- You can write the appropriate email address prefix that you want, based on this, the email address will be generated
- You must select the checkbox for “Active”
- You must have to select any context user mostly your system admin user
- You must have to specify the domain from which you want to accept incoming emails

SETUP

Email Services

Email Service Address

Specify an email address for this email service. The email service processes messages sent to this address. One email service can have multiple email addresses.

Email Service Information

Email Service Name

incoming-email-service

Accept Email From

differenzsystem.com, differenz.co.in

Email Address Information

Email Address Name

ap-receiver

Email address

incoming-email-service

Specify the local-part of the email address. Salesforce.com assigns the domain name part of the address.

Active

☒

Context User

shyam agrawal

Accept Email From

differenzsystem.com, differenz.co.in

Save

Save and New

Cancel

Step 6: Click on “Save” & you will get your Salesforce Email Address which you can use to send your invoices to.

SETUP

Email Services

Email Service: incoming-email-service

Edit

Activate

Deactivate

Delete

Cancel

Email Service Name

incoming-email-service

Apex Class

ParseEmailInvoice

Accept Attachments

All

Advanced Email Security Settings

☐

Accept Email From

differenzsystem.com, differenz.co.in

Convert Text Attachments to Binary Attachments

☐

Active

☒

▼ Failure Response Settings

Over email rate limit action

Discard message

Deactivated Email Address Action

Discard message

Deactivated Email Service Action

Discard message

Unauthorized sender action

Discard message

Unauthorized sender action

Discard message

Enable Error Routing

☐

Email Addresses

New Email Address

Action	Email Address Name	Email Address	Context User
View Edit	ap_receiver	incoming_email_service@28u5uapqibhr75ch7hvvu8uzozekibourtd83y6obeb@im8k-ho-1a@ymaa.na232.apex.salesforce.com	shyam.agrawal

Q3. How to create an Admin User & Staff User?

Step 1: Select User Menu from Menu Bar

Quick Payable

Home

Payable Invoices

Paid Documents

Vendors

GL codes

Dashboards

Reports

Users

Global Configs

Search...

All Users

All Users

All

Admin

Staff

Active Users

Search user...

New

	First Name	Last Name	Email	Username	Role	User Type	Profile	Monetary Limit	Manager	Is Active?
1	shyam	agrawal	shyam@differenceystem.c...	qpaycustomer2@difference...	Admin	System Administrator	System Administrator	\$5,000.00		✓

Step 2: Click on the New Button

Step 3: If you already have a user in your Salesforce Org then select the “Existing” tab otherwise select “New”

- If you are adding a new User then please fill in all the information including the relevant First Name, Last Name, Email, Username, Salesforce Profile, User Type, Manager, and monetary Limit.

The screenshot shows a web application interface with a top navigation bar containing 'Vendors', 'GL codes', 'Dashboards', 'Reports', 'Users', and 'Global Configs'. The 'Users' tab is selected. Below the navigation bar, there's a modal window titled 'Add New User'. Inside the modal, there are two tabs: 'New' (active) and 'Existing'. The form fields are as follows:

- * First Name: Robin
- * Last Name: Hood
- * Email: robin.hood@gmail.com
- * Username: robin.hood@gmail.com
- * Salesforce Profile: Standard User (dropdown)
- User Type: Admin (dropdown)
- Manager: shyam agrawal (with a user icon and a close button)
- User Role: SVP Customer Experience (dropdown)
- Monetary Limit: \$1,000.00

At the bottom right of the modal, there are 'Cancel' and 'Save' buttons.

- If you are just selecting an existing user then only need to fill in Salesforce Profile, User Type, Manager, and Monetary Limit.

aycustomer2@differeenz... Admin System Administrator

Add New User

User

 shyam agrawal ×

User Type

Admin ▲▼

Manager

 shyam agrawal ×

User Role

SVP Customer Experience ▲▼

Monetary Limit

\$1,000.00

Cancel Save

Step 4: After that click on “Save” button your user will be added. After that, you can modify user information at any time and if no longer needed, you can deactivate that user as well.

Note: Please make sure you have enough “Quick Payable” licenses before you create users otherwise your user won’t be able to access it.

Q4. How to customize the Invoice List and restrict it to Admin Users only?

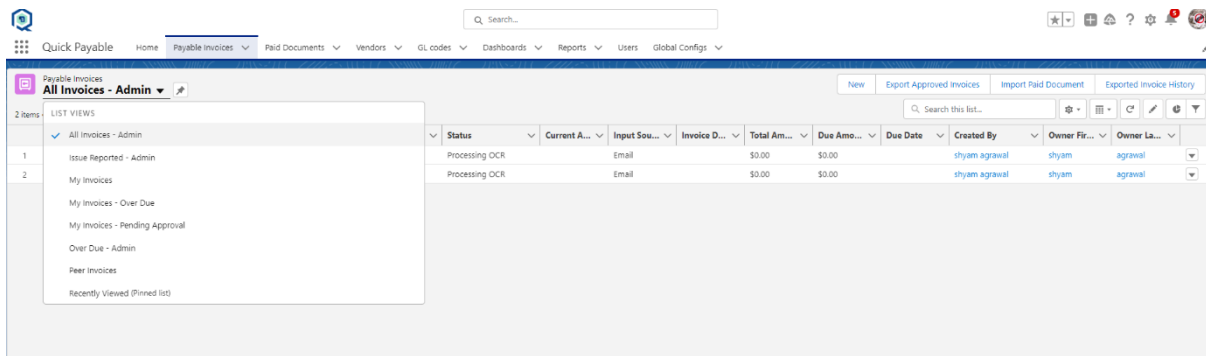
Step 1: Select “Payable Invoice” Menu

Step 2: Open List View by clicking on the arrow icon, select the below list one by one, and perform all further steps for each List.

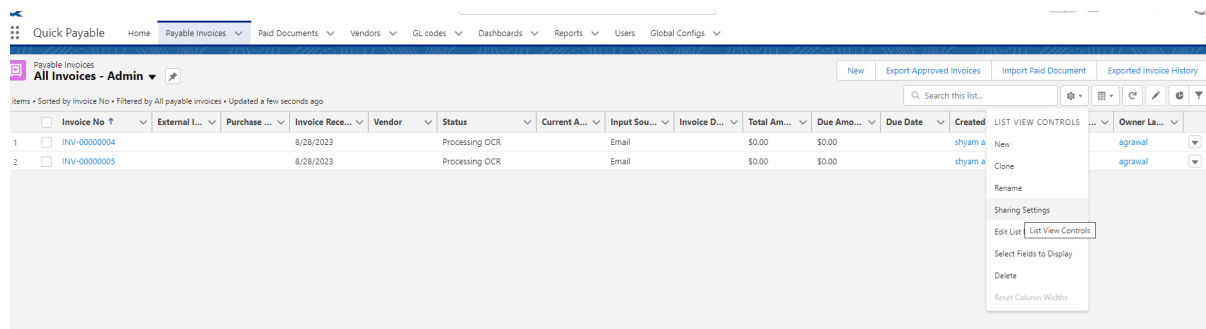
“All Invoices – Admin”

“Issue Reported – Admin”

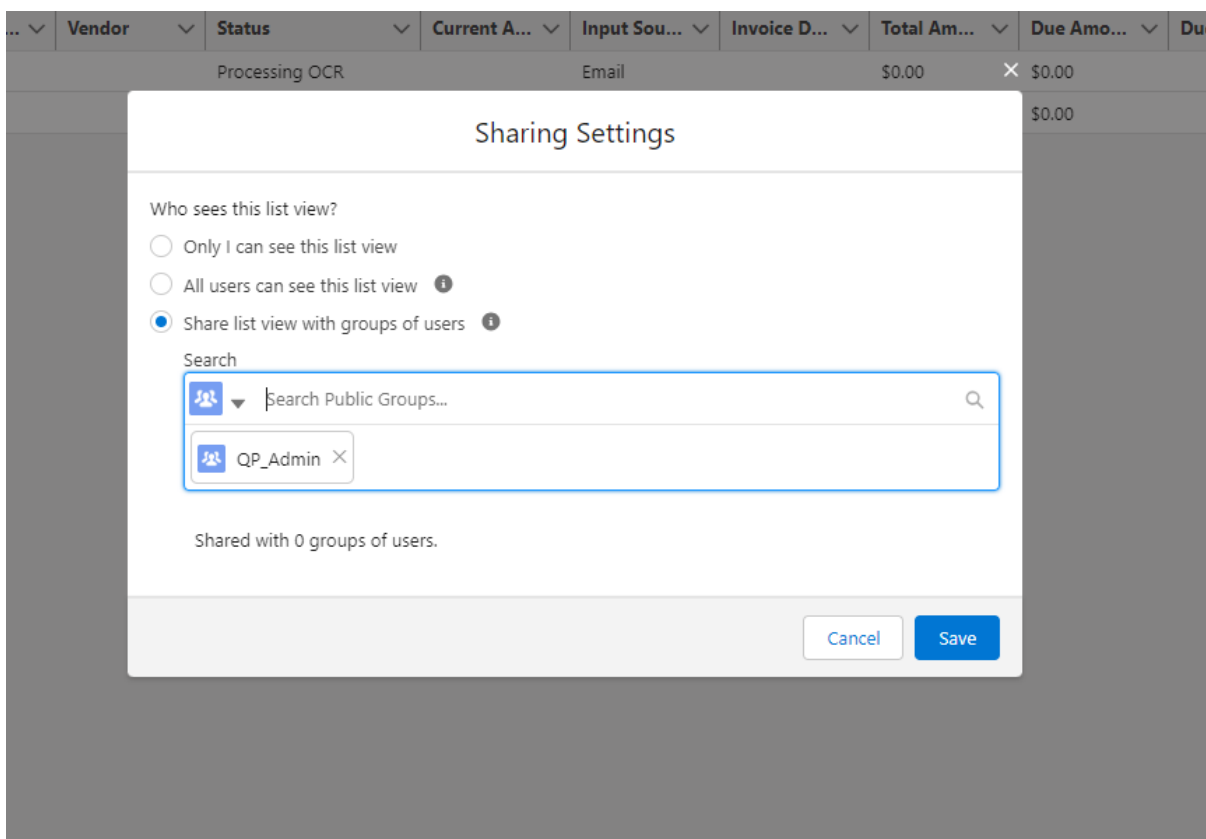
“Over Due – Admin”



Step 3: After that click on the Setting Gear Icon located on the right side and click on “Sharing Setting”



Step 4: Select the third option “Share list view with groups of users”, select “QP_Admin” group and hit on Save button

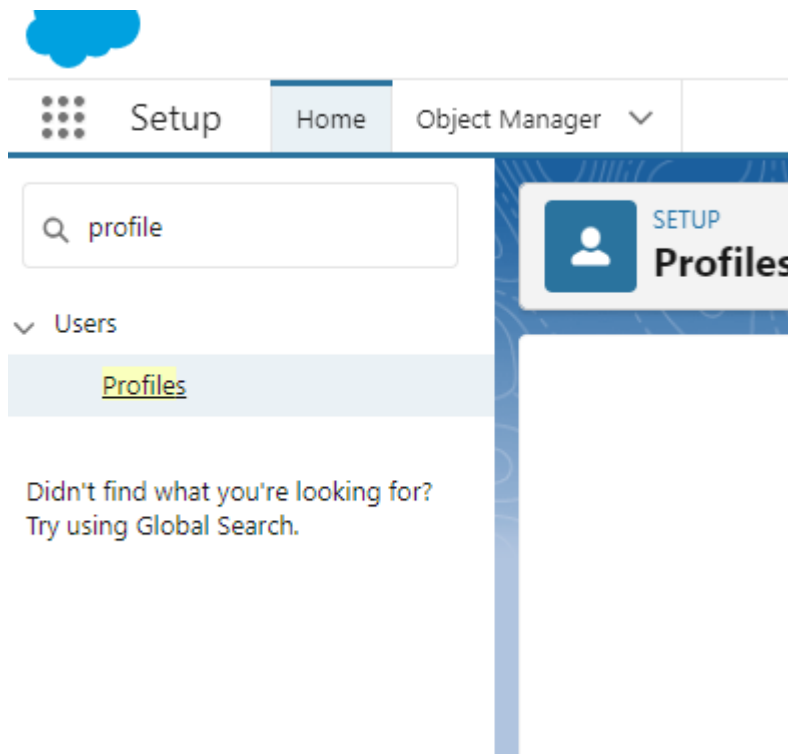


Step 5: Now, perform this same for all remaining 2 lists and do this same for any other list which you want to prevent to Staff User.

Q5. How to customize the tabs and restrict them to Admin Users only?

Step 1: Click on Setup

Step 2: Go to Profile



Step 3: Edit a profile that you have assigned to your Staff User

Step 4: Inside Custom Tab Settings, you can make it off or on as per your needs. You can keep turning off “User”, “Paid Documents”, “Global Configs”, “Dashboard”, and “Reports” tabs and click on save.

