Quick Payable

Customization Guide V2.0

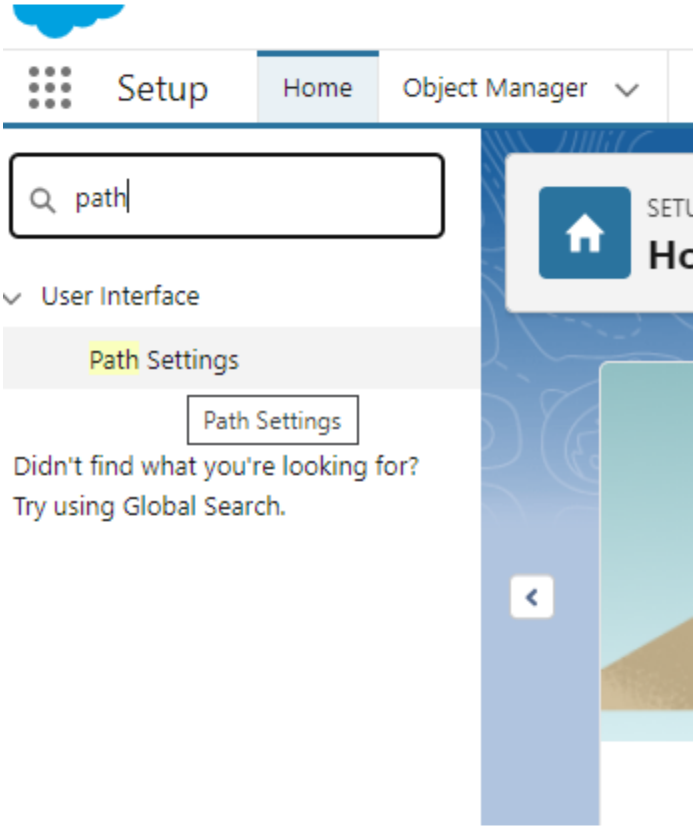
Last Updated Date: 05/07/2026

Contents

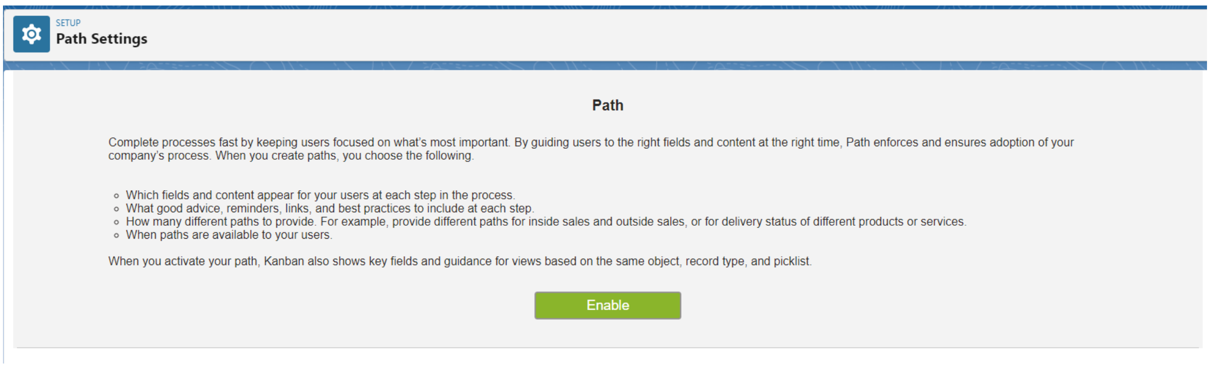
Q1. How can you activate the status path for Invoice?

Step 1: Go to Setup

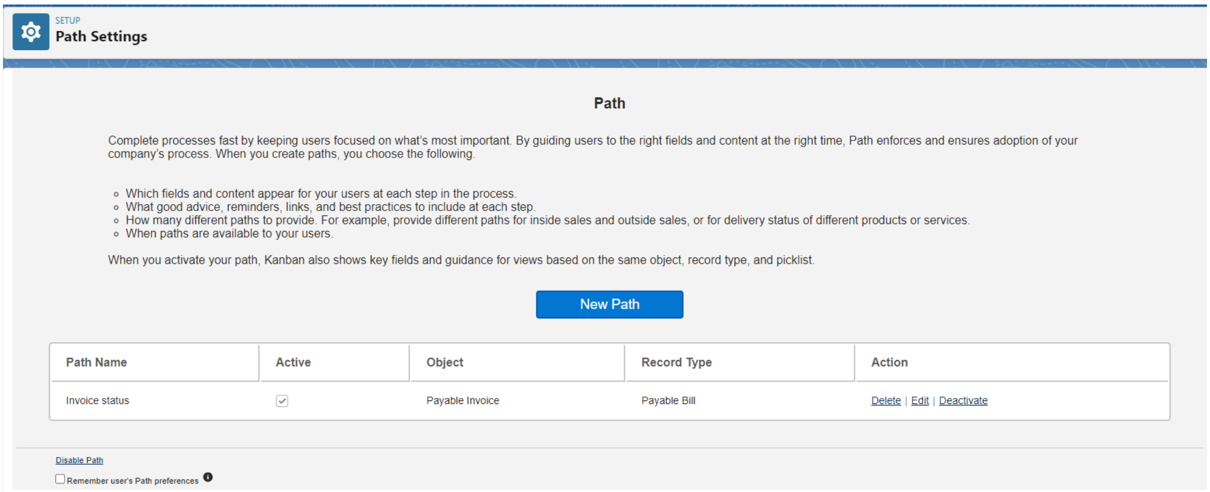
Step 2: Find “Path Settings” and click on it

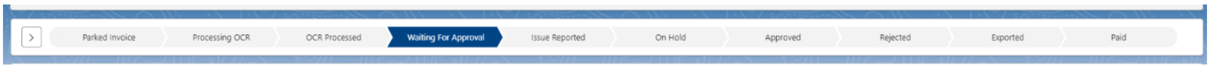


Step 3: Click on Enable



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

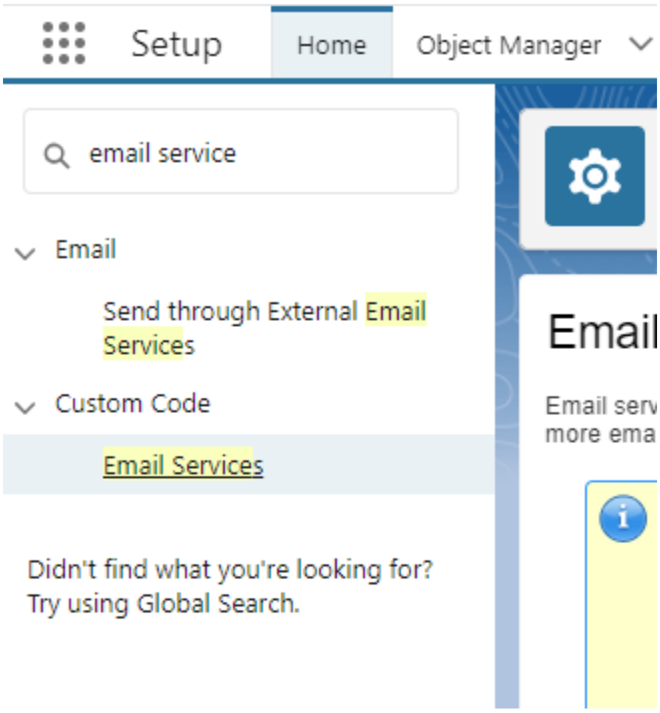




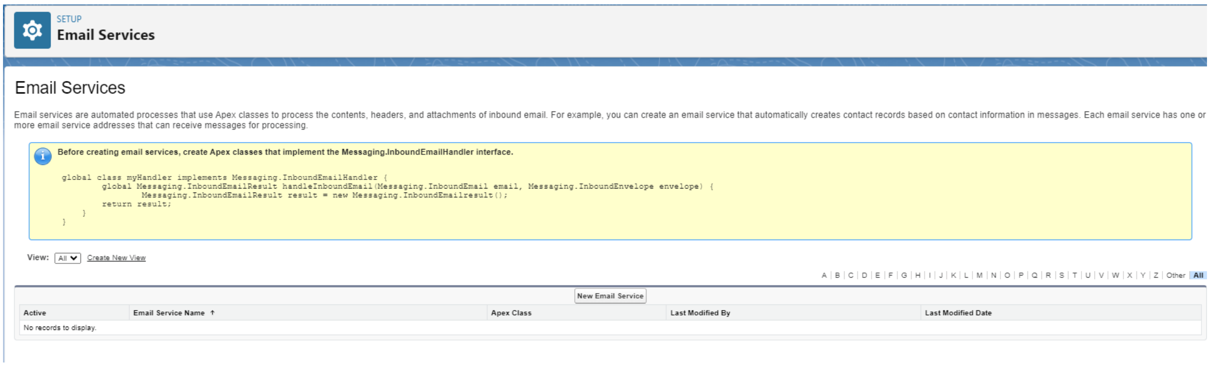
Q2. How to create an Email Service?

Step 1: Go to Setup

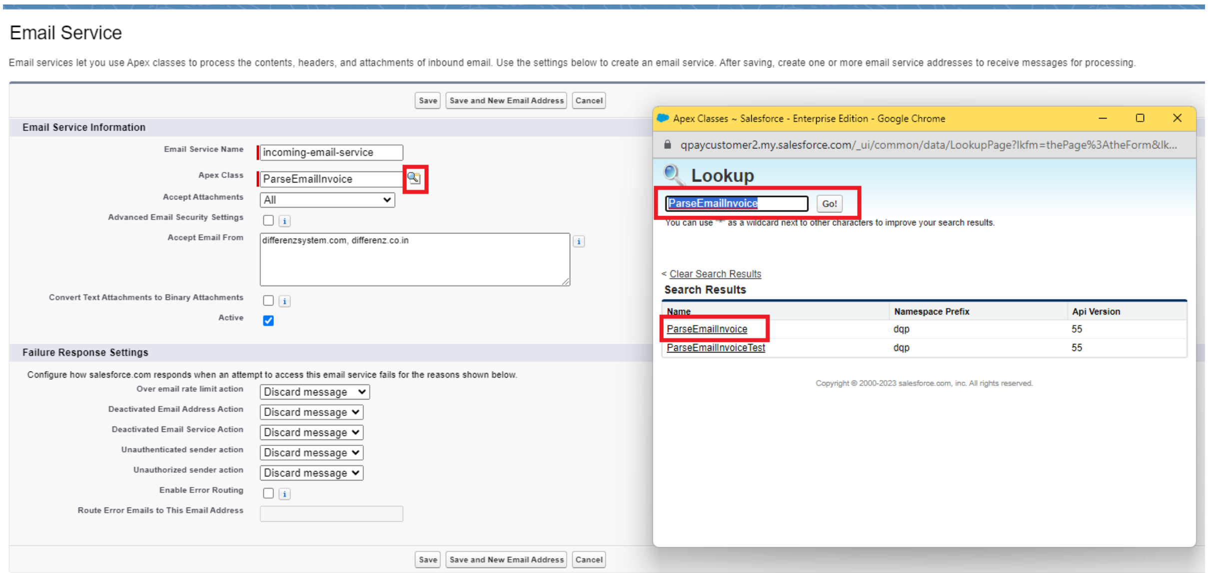
Step 2: Find “Email Services” and click on it



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



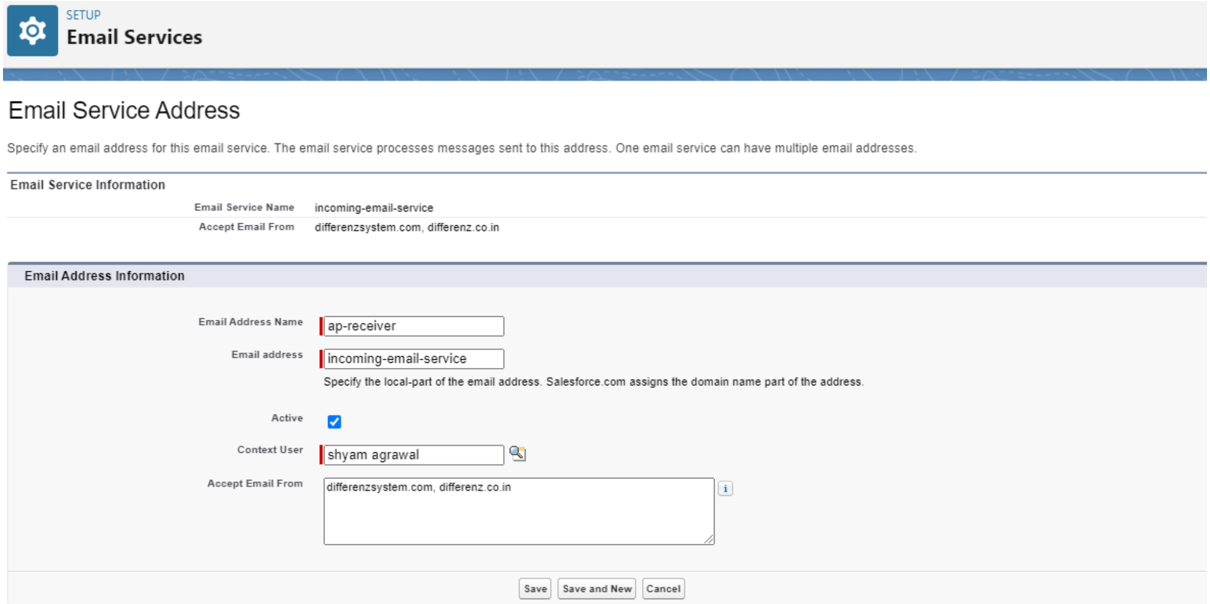
Step 4: Fill out the forms as the below



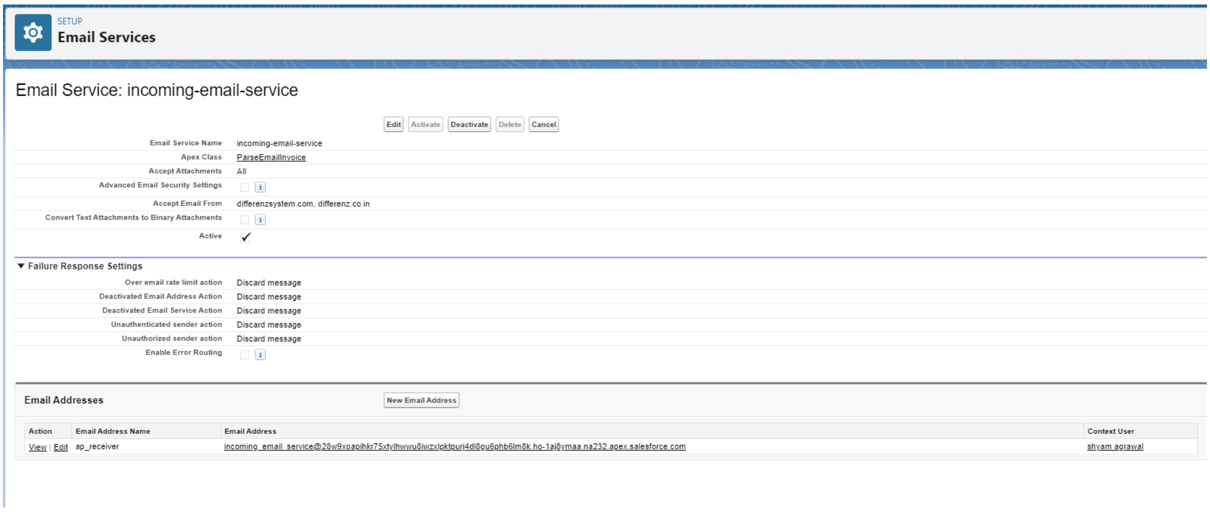
- You can give any name to “Email Service Name”
- You must have to select the “ParseEmailInvoice” Apex Class as shown above
- You must have to select “All” in the “Accept Attachments” dropdown
- You must have to specify the domain from which you want to accept an email
- You must select the checkbox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

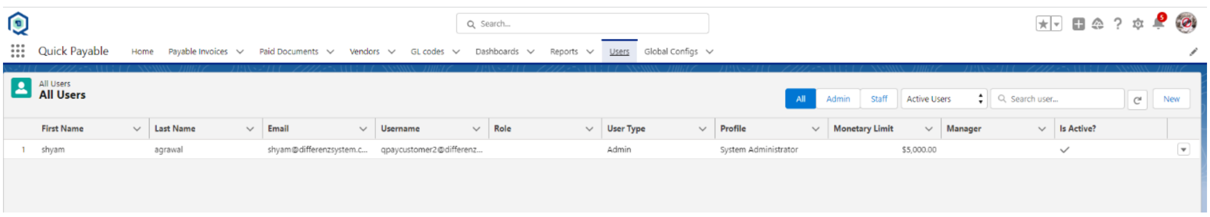


Step 6: Click on “Save” & you will get your Salesforce Email Address which you can use to send your invoices to.



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

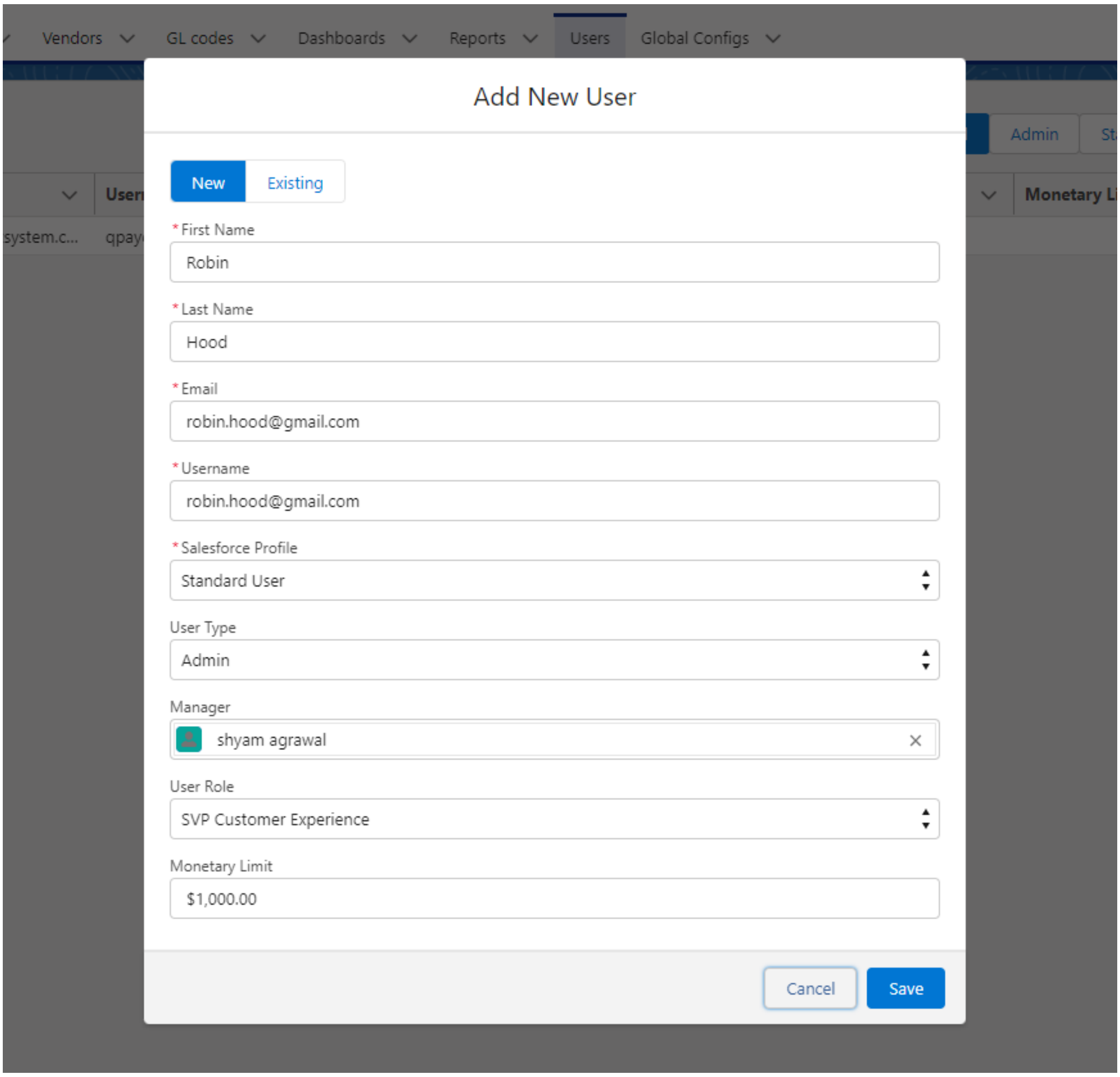
Step 1: Select User Menu from Menu Bar



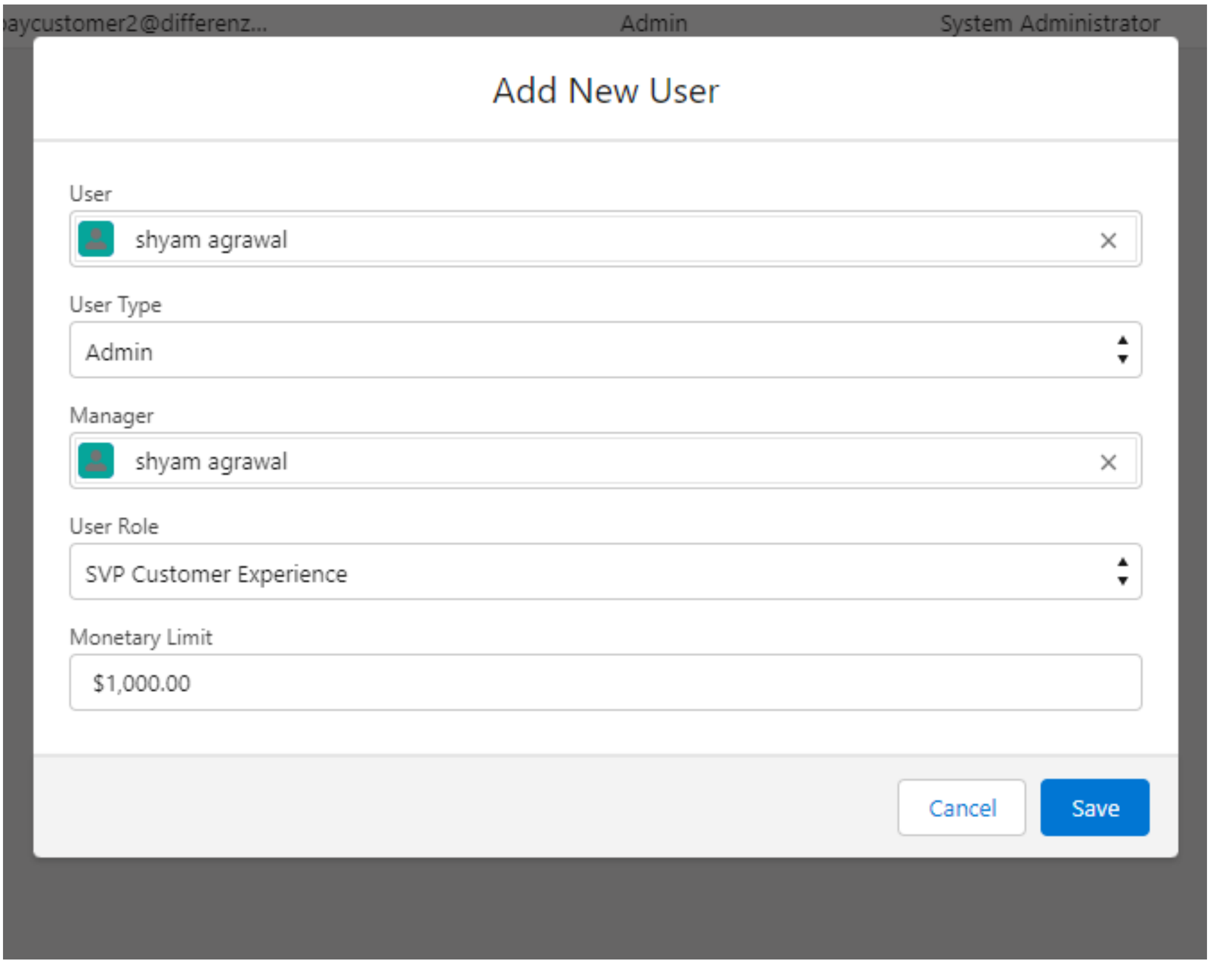
Step 2: Click on the New Button

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.



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



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?

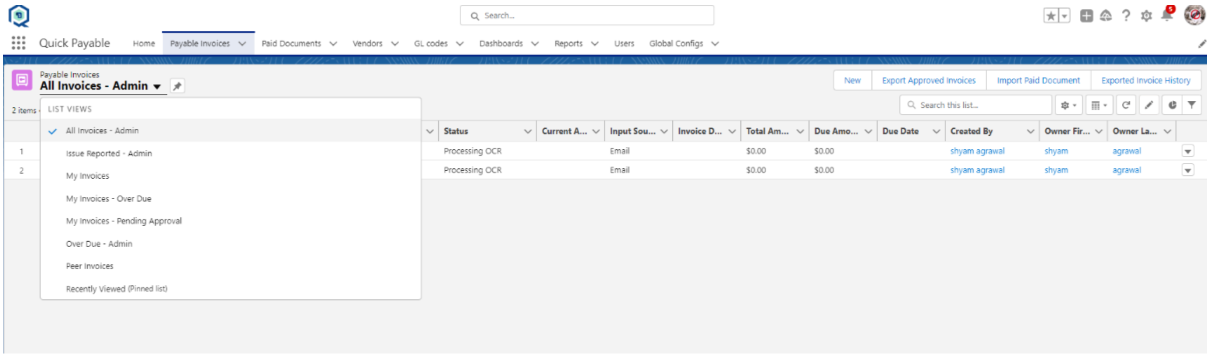
Step 1: Select “Payable Invoice” Menu

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.

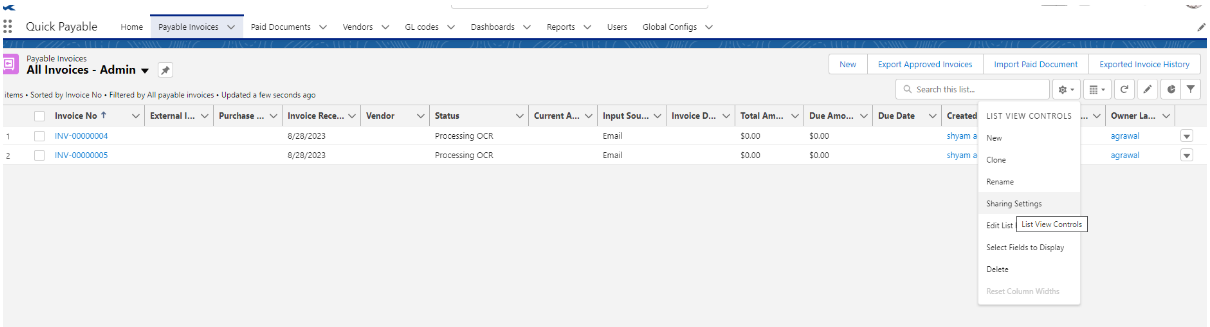
“All Invoices – Admin”

“Issue Reported – Admin”

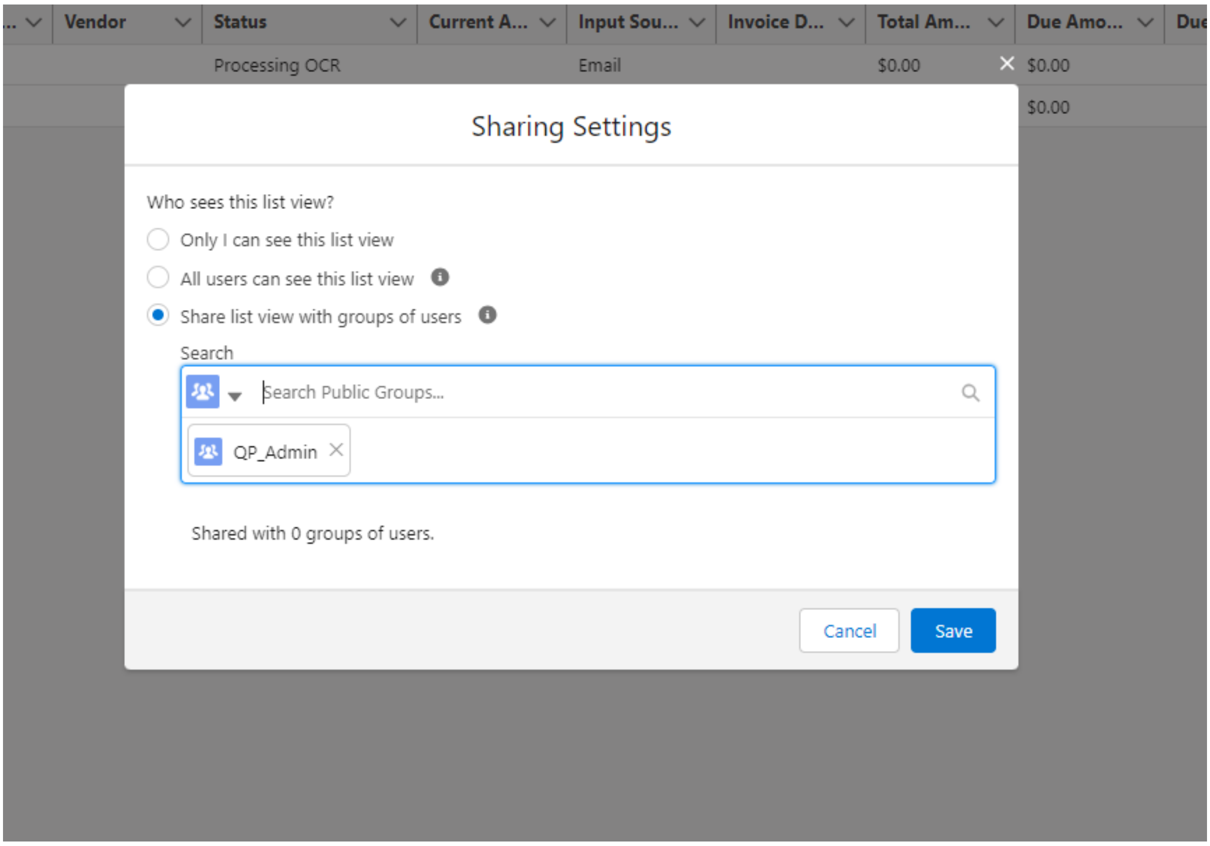
“Over Due – Admin”



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

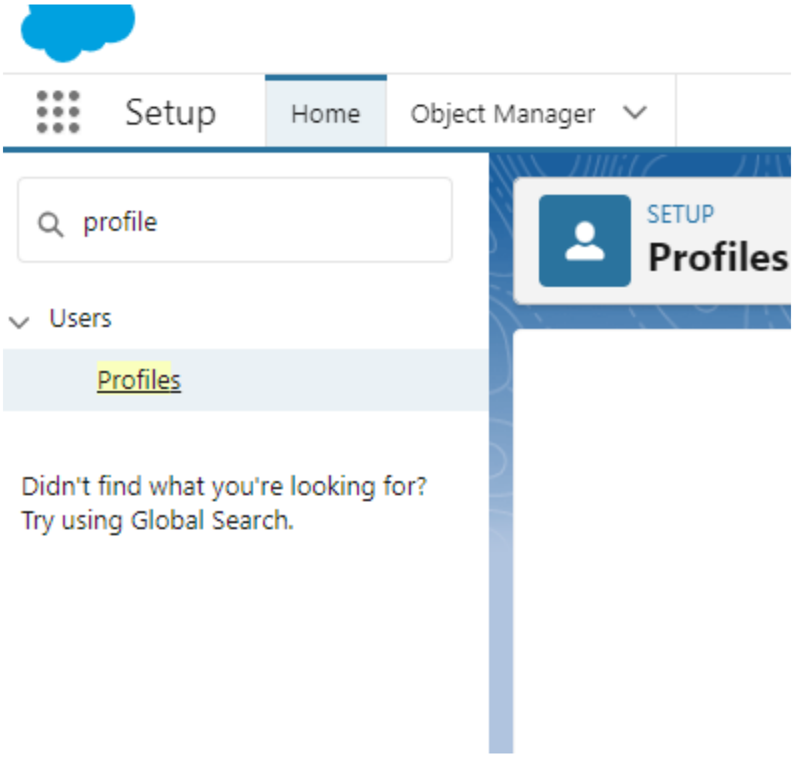


Step 5: Now, perform this same for all remaining 2 lists and do this same for any other list which you want to prevent to Staff User.

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.