

# Invoice and Credit List Definitions

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## The Invoice List

When navigating to Accounts Receivable > Invoices, the user arrives at the Invoices page. This page is comprised of four tabs of information: Invoices, Credits, Invoice/Credits Not Delivered, and Printed Batch History. Each tab has three common options: Export to Excel, Show /Hide, and Custom Grid Layout. Each of these tabs is described within this article.

## Invoices Tab

This tab displays all invoices with an open balance.

Functions available from the Invoices tab:

- Click on the hyperlink of an Invoice # to open the invoice record for viewing.
- Click on the hyperlink of a customer name to open the customer record.
- Pay an invoice with a credit card, eCheck, or cash/check.
- Credit an invoice.
- Export the currently viewed grid data to an Excel file.
- Sort the grid on any of the column headers.
- Group the grid data by one or more columns.
- Create filters to refine the data displayed.
- Show invoices with and without an amount due.
- Select additional or different columns to display in the grid area, and save as a custom grid layout.
- Generate recurring invoices.

**Invoices**

[Invoices](#)
[Credits](#)
[Invoices/Credits Not Delivered](#)
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 Recurring Invoices

Show all invoices

Drag a column header and drop it here to group by that column

Invoice # ↑	Customer Name	Invoice Date	Total Amount	Amount Due	
<a href="#">10139</a>	<a href="#">1030 - Jones, Drew</a>	Jun 28, 2015	\$137.50	\$137.50	<input type="button" value="\$ Pay Invoice"/>
<a href="#">10140</a>	<a href="#">1030 - Jones, Drew</a>	Jul 14, 2015	\$2,663.88	\$2,663.88	<input type="button" value="\$ Pay Invoice"/>
<a href="#">10142</a>	<a href="#">1030 - Jones, Drew</a>	Aug 1, 2015	\$31.97	\$31.97	<input type="button" value="\$ Pay Invoice"/>
<a href="#">10143</a>	<a href="#">1030 - Jones, Drew</a>	Jul 30, 2015	\$31.97	\$31.97	<input type="button" value="\$ Pay Invoice"/>
<a href="#">10144</a>	<a href="#">1030 - Jones, Drew</a>	Jul 30, 2015	\$31.97	\$31.97	<input type="button" value="\$ Pay Invoice"/>
<a href="#">10145</a>	<a href="#">1030 - Jones, Drew</a>	Aug 3, 2015	\$31.97	\$31.97	<input type="button" value="\$ Pay Invoice"/>
<a href="#">10146</a>	<a href="#">1033 - Parsons, Alan</a>	Aug 3, 2015	\$770.89	\$770.89	<input type="button" value="\$ Pay Invoice"/>
<a href="#">10150</a>	<a href="#">1033 - Parsons, Alan</a>	Sep 1, 2015	\$63.93	\$63.93	<input type="button" value="\$ Pay Invoice"/>
<a href="#">10152</a>	<a href="#">1033 - Parsons, Alan</a>	Aug 19, 2015	\$25.00	\$25.00	<input type="button" value="\$ Pay Invoice"/>
<a href="#">10154</a>	<a href="#">1030 - Jones, Drew</a>	Aug 21, 2015	\$31.97	\$31.97	<input type="button" value="\$ Pay Invoice"/>
<a href="#">10155</a>	<a href="#">1034 - Cocker, Alta</a>	Aug 29, 2015	\$612.69	\$612.69	<input type="button" value="\$ Pay Invoice"/>

1 2 3 4 5 6 7 8 9 10 ...
1 - 100 of 1068 items

## Credits Tab

This tab will display all credits that have not been applied to invoices.

Functions available from the Credits tab:

- Click on the hyperlink of a Credit # to open the credit record for viewing.
- Click on the hyperlink of a customer name to open the customer record.
- Apply a credit to invoices.
- Export the currently viewed grid data to an Excel file.
- Sort the grid on any of the column headers.
- Group the grid data by one or more columns.
- Create filters to refine the data displayed.
- Show credits with and without an amount available to apply.
- Select additional or different columns to display in the grid area, and save as a custom grid layout.
- Generate recurring invoices.

**Invoices** Recurring Invoices

Invoices Credits **Invoices/Credits Not Delivered** Printed Batch History

Export to Excel NO Show all credits Custom Grid Layout

Drag a column header and drop it here to group by that column

<input type="checkbox"/>	Credit #	Customer Name	Invoice Date	Available Credit	Credits Applied	
<input type="checkbox"/>	<a href="#">21450</a>	<a href="#">3719 - Wood, Emily</a>	Mar 22, 2022	\$47.70	\$0.00	<input checked="" type="checkbox"/> Apply
<input type="checkbox"/>	<a href="#">21466</a>	<a href="#">3719 - Wood, Emily</a>	Mar 25, 2022	\$63.60	\$0.00	<input checked="" type="checkbox"/> Apply
<input type="checkbox"/>	<a href="#">20451</a>	<a href="#">1129 - Cushing, Mark</a>	Jan 4, 2018	\$31.97	\$0.00	<input checked="" type="checkbox"/> Apply

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## Invoices/Credits Not Delivered Tab

A list of all invoices and credits that have not been marked as delivered will be shown in the grid area.

Functions available from this tab:

- Click on the hyperlink of a Credit # to open the credit record for viewing.
- Click on the hyperlink of a customer name to open the customer record.
- Deliver invoices/credits. If the delivery method on the invoice or credit is set to email or mail, the item will be sent electronically. If the delivery method is set to print, a .pdf file will be created for downloading and printing.
- Mark invoices and credits as printed.
- Export the currently viewed grid data to an Excel file.
- Sort the grid on any of the column headers.
- Group the grid data by one or more columns.
- Create filters to refine the data displayed.
- Show credits with and without an amount available to apply.
- Select additional or different columns to display in the grid area, and save as a custom grid layout.
- Generate recurring invoices.

**Invoices**

Invoices Credits **Invoices/Credits Not Delivered** Printed Batch History Recurring Invoices

Export to Excel Custom Grid Layout

Drag a column header and drop it here to group by that column

<input type="checkbox"/>	Inv/Cr #	Customer Name	Invoice Date	Delivery Meth. ↓	Available Credit	
<input type="checkbox"/>	<a href="#">222</a>	<a href="#">3719 - Wood, Emily</a>	Mar 31, 2022	Print	\$263.82	Deliver
<input type="checkbox"/>	<a href="#">226</a>	<a href="#">3719 - Wood, Emily</a>	Mar 31, 2022	Print	\$355.10	Deliver
<input type="checkbox"/>	<a href="#">231</a>	<a href="#">1035 - Waters, Roger</a>	Apr 3, 2022	Print	\$92.27	Deliver
<input type="checkbox"/>	<a href="#">233</a>	<a href="#">1029 - Donoson, Bill</a>	Apr 3, 2022	Print	\$635.94	Deliver
<input type="checkbox"/>	<a href="#">205</a>	<a href="#">3720 - Watson, George</a>	Mar 28, 2022	Print	\$0.00	Deliver
<input type="checkbox"/>	<a href="#">206</a>	<a href="#">3719 - Wood, Emily</a>	Mar 28, 2022	Print	\$30.67	Deliver
<input type="checkbox"/>	<a href="#">207</a>	<a href="#">1029 - Donoson, Bill</a>	Mar 29, 2022	Print	\$0.00	Deliver
<input type="checkbox"/>	<a href="#">211</a>	<a href="#">1035 - Waters, Roger</a>	Mar 29, 2022	Print	\$65.13	Deliver
<input type="checkbox"/>	<a href="#">213</a>	<a href="#">1029 - Donoson, Bill</a>	Mar 29, 2022	Print	\$249.68	Deliver
<input type="checkbox"/>	<a href="#">265</a>	<a href="#">1035 - Waters, Roger</a>	Apr 1, 2022	Print	\$8,531.84	Deliver
<input type="checkbox"/>	<a href="#">266</a>	<a href="#">1038 - All Electronics</a>	Apr 1, 2022	Print	\$3,069.45	Deliver

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## Printed Batch History Tab

A list of all print files for invoices and credits that have or have not been marked as printed will be shown in the grid area.

Functions available from this tab:

- Export the currently viewed grid data to an Excel file.
- Sort the grid on any of the column headers.
- Group the grid data by one or more columns.
- Create filters to refine the data displayed.
- Download a file for printing.
- Generate recurring invoices.

# Invoices

- Invoices
- Credits
- Invoices/Credits Not Delivered
- Printed Batch History

Recurring Invoices

Export to Excel

Custom Grid Layout

Drag a column header and drop it here to group by that column

ID	Export Date	Export User	Modified By	Modified	Batch Count	Printed	
1080	Mar 28, 2022	bestsecurity	bestsecurity	Mar 28, 2022	1	<input checked="" type="checkbox"/> YES	Download
1081	Mar 28, 2022	bestsecurity	bestsecurity	Mar 28, 2022	2	<input checked="" type="checkbox"/> YES	Download
1031	Oct 1, 2018	bestsecurity	bestsecurity	Mar 28, 2022	20	<input checked="" type="checkbox"/> YES	Download
1030	Oct 22, 2017	bestsecurity	bestsecurity	Oct 22, 2017	2	<input type="checkbox"/> NO	Download
31	Jan 8, 2017	bestsecurity	bestsecurity	Jan 8, 2017	1	<input type="checkbox"/> NO	Download
30	Jan 7, 2017	bestsecurity	bestsecurity	Jan 7, 2017	1	<input type="checkbox"/> NO	Download
29	Sep 11, 2015	Natasha	Natasha	Sep 11, 2015	1	<input type="checkbox"/> NO	Download
28	Aug 19, 2015	bestsecurity	bestsecurity	Aug 19, 2015	2	<input type="checkbox"/> NO	Download
27	Jun 8, 2015			Jun 8, 2015	1	<input type="checkbox"/> NO	Download
26	Apr 29, 2015			Apr 29, 2015	1	<input type="checkbox"/> NO	Download
25	Apr 9, 2015			Apr 9, 2015	0	<input type="checkbox"/> NO	Download

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Refresh