Invoice and Credit List Definitions

Last Modified on 12/16/2024 5:02 pm EST

The Invoice List

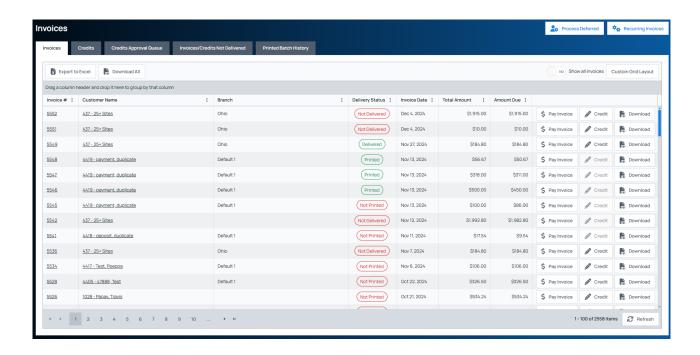
When navigating to Accounts Receivable > Invoices, the Invoices page opens. This page has these tabs of information: Invoices, Credits, Credits Approval Queue, Invoice/Credits Not Delivered, and Printed Batch History. Each tab has three common options: Export to Excel, Show/Hide, and Custom Grid Layout. 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 the hyperlink of an Invoice # to open the invoice detail.
- Click the hyperlink of a customer name to open the customer detail.
- Pay an invoice with a credit card, eCheck, or cash/check.
- Credit an invoice.
- Download an invoice.
- Download all invoices.
- Export the grid data for all invoices 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.

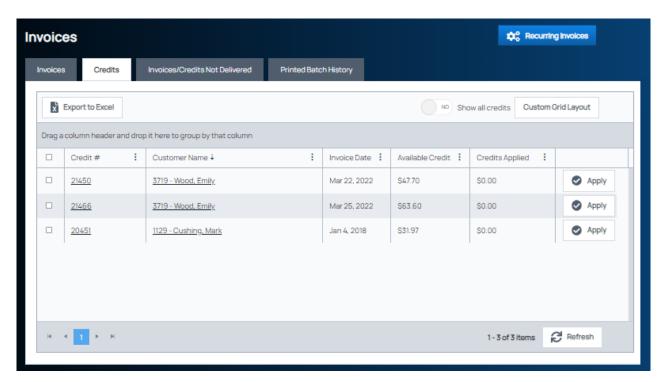


Credits Tab

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

Functions available from the Credits tab:

- Click the hyperlink of a Credit # to open the credit record for viewing.
- Click 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.

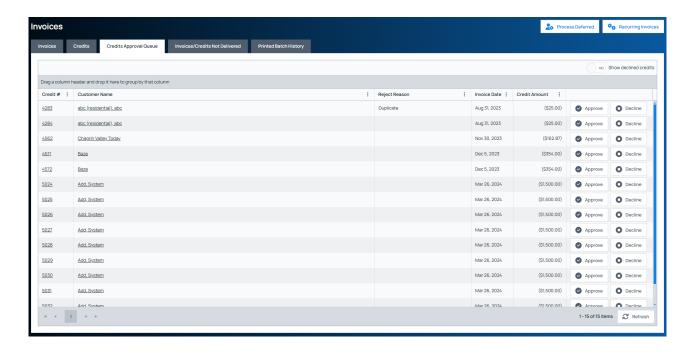


Credits Approval Queue

This tab displays all credits that are in the approval queue.

Functions available from this tab:

- Click the hyperlink of a Credit # to open the credit detail.
- Click the hyperlink of a customer name to open the customer detail.
- Approve a credit using the **Approve** button in a row.
- Decline a credit using the **Decline** button in a row.

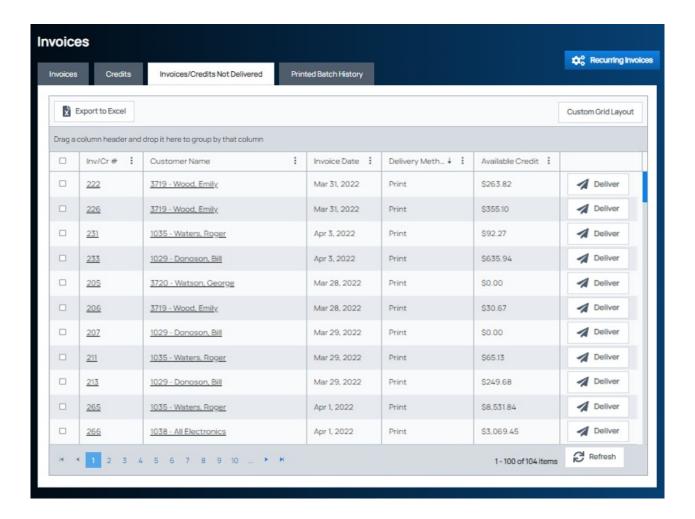


Invoices/Credits Not Delivered Tab

This tab displays all invoices and credits that have not been marked as delivered.

Functions available from this tab:

- Click the hyperlink of a Credit # to open the credit detail.
- Click the hyperlink of a customer name to open the customer detail.
- 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.



Printed Batch History Tab

This tab displays a list of all print files for invoices and credits that have or have not been marked as printed.

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.

