

Invoices Tab

Last Modified on 04/29/2022 10:23 am EDT

The Invoices tab displays all invoices with a balance due.

Show All Invoices

Clicking on the toggle button labeled "Show All Invoices", will display all invoices with a zero and non-zero balance.

New Invoice Button

Clicking on the New Invoice button will open the Invoice form to create a manual invoice for items and/or parts.

Generate Statement Button

Clicking this button will open a dialog box for the user to select the delivery method for the statement.

Pay Invoice Button

If the customer has a credit card or eCheck bank account on file, clicking the Pay Invoice button will open a form for selecting the payment method and submitting the payment for funding. If the customer does not have a credit card or eCheck bank account on file, the user is able to enter a new credit card or bank account for the customer, and submit the payment for funding.

Invoice Hyperlink

In the Invoice # column, clicking on the hyperlink of an invoice will open the invoice for viewing. Users with permissions are able to make changes to the invoice and re-save.



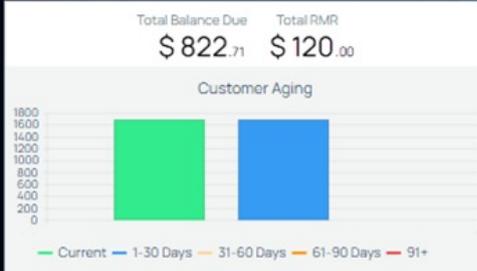
Emily Wood

Customer #3719 Active Normal Residential-Owner • Since 3/4/22

Edit

Tasks

History



Address 45722 Chandler
Plymouth, MI 48170

Phone (734) 258-4646

Cell (734) 258-3311

Email emilylwood@gmail.com

Salesperson Dan Brown

Last Statement

Default Term

Delivery Method Print

Delivery RMR Inv

Comments

- Invoices 7
- Credits 2
- Sites/Systems 2/3
- RMR 5
- Work Orders 2
- Proposals 0
- Payments 8
- CC/eCheck
- Notes 0
- Contacts 2
- Documents
- Archive
- Custom Fields
- eForms
- Emails

[+ New Invoice](#) [Generate Statement](#) Show all invoices

Invoice #	Invoice Date	Due Date	PO Number	Total Amount	Amount Due	
298	Apr 1, 2022	Apr 1, 2022		\$71.61	\$71.61	\$ Pay Invoice
227	Apr 1, 2022	Apr 1, 2022		\$199.48	\$199.48	\$ Pay Invoice
226	Mar 31, 2022	Mar 31, 2022		\$355.10	\$355.10	\$ Pay Invoice
224	Mar 31, 2022	Mar 31, 2022		\$331.98	\$331.98	\$ Pay Invoice
222	Mar 31, 2022	Mar 31, 2022		\$263.82	\$263.82	\$ Pay Invoice
219	Mar 31, 2022	Mar 31, 2022		\$431.35	\$431.35	\$ Pay Invoice
206	Mar 28, 2022	Mar 28, 2022		\$901.00	\$30.67	\$ Pay Invoice

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