

# Billing Screen

Billing Information for a single customer account.

Lookup account by customer name or by invoice #.

**Account Lookup**  
 By Invoice    
 OR  
 By Associate:

Type: L ; 5021 - Guys Company Name  
 123 Notastreet Rd. Suite 45 Anytown MN 55113  
[\[<< Prev\]](#) Total Samples 28 Samples With Charges 1 [\[Next >>\]](#)  
 # of Invoices 1 Last Invoice: L1004 (06/30/15)

|                              |                          |                          |                                     |                                 |                               |
|------------------------------|--------------------------|--------------------------|-------------------------------------|---------------------------------|-------------------------------|
| <a href="#">Open Charges</a> | <a href="#">Invoices</a> | <a href="#">Payments</a> | <a href="#">Review Transactions</a> | <a href="#">Account History</a> | <a href="#">Account Aging</a> |
|------------------------------|--------------------------|--------------------------|-------------------------------------|---------------------------------|-------------------------------|

**Billing Detail (Type: L)** [\[Help\]](#)  
 Some Guys Seed Company (5021)  
 Showing Charges/Credits not on any invoice. [\[Create Invoice\]](#)  
 Last Refreshed @ 2016-04-13 16:25:22 [\[Refresh\]](#)

| Date           | Reference | Description | Qty | Debit | Credit |
|----------------|-----------|-------------|-----|-------|--------|
| [X] 2015-09-24 | 15-1234   | Com: Purity | 1   | 10.00 |        |

## Open Charges (and Credits)

To add a single charge or credit, from Left Menu / Billing / Associate Accounts / [Open Charges] Then press [Add Row].

You need to provide a meaningful reference here, such as check number. If you want PH to add the reference, you need to bill from the Samples Screen. Adding a row here does not attach it to a specific field or sample.

## Invoices

**List Invoices (L)** [\[Help\]](#)  
 Some Guys Seed Company  
 Last Refreshed @ 2016-04-13 16:26:20 [\[Refresh\]](#)

| Invoice | Date     | Due      | Prev Balance | Credits | Debits | New Balance | Amount Paid | Printed                     | Emailed |
|---------|----------|----------|--------------|---------|--------|-------------|-------------|-----------------------------|---------|
| L1004   | 06/30/15 | 07/31/15 | 0.00         | 0.00    | 20.00  | 20.00       |             | <a href="#">[Print Now]</a> |         |

**Invoice Detail - L1004** [\[Help\]](#)

| Invoice Date | Due Date | Invoice Amount | Printed | Emailed | PDF |
|--------------|----------|----------------|---------|---------|-----|
| 06/30/15     | 07/31/15 | 20.00          |         |         |     |

[\[Click Here\]](#) to remove this invoice. (charges will be set to "open" and can be edited)

| Date     | Reference | Description                | Qty | Debit | Credit |
|----------|-----------|----------------------------|-----|-------|--------|
|          |           | Balance Forward            | 1   | 0.00  |        |
| 06/16/15 | DUMMY LOT | Fescue, Idaho: Germination | 1   | 10.00 |        |
| 06/16/15 | DUMMY LOT | Fescue, Idaho: Purity      | 1   | 0.00  |        |
| 06/16/15 | DUMMY LOT | Fescue, Idaho: Seed count  | 1   | 0.00  |        |
| 06/16/15 | DUMMY LOT | Rush                       | 1   | 10.00 |        |
| Totals   |           |                            |     | 20.00 | 0.00   |

**Payments On Invoice**

| #  | Date | Reference | Description | Amount |
|--|------|-----------|-------------|--------|
| <div style="border: 1px solid black; padding: 2px;"> <span style="font-size: small;">Notice:</span> No rows found                 </div> |      |           |             |        |

Lists all the invoices that have been created for this customer. Invoice detail can be viewed by clicking on the Invoice Number (left column)

The Invoice itself (PDF with form for emailing) can be viewed by clicking the [\[Print Now\]](#) link (Note: If invoice has already been generated to PDF, Link text will show the print date [04/01/16] instead of [\[Print Now\]](#))

## Invoice PDF

After clicking the [Print Now] link (or the link with the Print Date if the invoice has already been generated, the tab will be replaced with a view of the invoice, as well as an "Email" form prefilled with any/all "Invoice" type emails defined for that customer. You can use this form to immediately send the invoice to the emails listed.

## Review Transactions

| View all transactions on account between dates                                     |          |         |           |   |        |            |
|--|----------|---------|-----------|---|--------|------------|
| Date not required, blank dates will be treated as beginning/end of time(no cutoff) |          |         |           |   |        |            |
| Date Range: Quarter 1 From: 2016-01-01 Thru: 2016-03-31 Apply                      |          |         |           |   |        |            |
| #  | Date     | Invoice | Reference | Description                             | Amount | Cumulative |
| 1  | 12/31/15 |         | Summary   | Total of transactions as of 12/31/15    | 30.00  | 30.00      |
| 2  | 01/13/16 |         | Dummy     | Fake Charge                             | 100.00 | 130.00     |
| 3  | 04/01/16 |         | Summary   | Total transactions on or after 04/01/16 | -30.00 | 100.00     |

List all the charges/credits/payments applied to the account, for any date range.

The first and last rows show the Sum of all charges/credits/payments that occurred outside the date range.

## Account History

A table which lists every invoice & payment for this customer, ordered by date.

| Date     | Reference       | Charges | Credits | Balance Due |
|----------|-----------------|---------|---------|-------------|
| 07/01/02 | Invoice C149    | 185.00  |         | 185.00      |
| 07/15/02 | 000 - Payment   |         | 185.00  | 0.00        |
| 08/01/02 | Invoice C171    | 343.00  |         | 343.00      |
| 08/20/02 | 90352 - Payment |         | 343.00  | 0.00        |
| 09/01/02 | Invoice C211    | 463.00  | 0.00    | 463.00      |
| 09/22/02 | 90550 - Payment |         | 463.00  | 0.00        |
| 10/01/02 | Invoice C258    | 540.00  |         | 540.00      |
| 10/18/02 | 90706 - Payment |         | 540.00  | 0.00        |
| 11/01/02 | Invoice C383    | 752.00  |         | 752.00      |

## Account Aging

This tab lists any invoices that have gone unpaid for more than 30 days.

See also Account Aging export

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