



Invoice to your Customers

2024-05-17

This document goes over the Invoice PDF itself, covering the various sections of the invoice, and the customizable options of the invoice.

Overview

An invoice is a list of charges and credits, along with an identifying number and an amount.

It may include a balance forward, or it may be presented as a total only of the listed charges.

If you include Balance Forward, your customer will see what he currently owes from previous unpaid invoices. Either way, there is a history at the top of the invoices.

Account History

This section appears at the top of the invoice. It shows the previous 3 invoices and any payments received after the date of the oldest invoice shown. The section also shows the account balance as of the invoice or payment date.

		Unpaid Balance	Charges	Credits	New Balance	
		\$0.00	\$1031.75	\$0.00	\$1031.75	
Account History (Last 3 Invoices)						
Date	Reference		Charges	Credits	Balance	
12/01/14	Invoice C333242		280.35	0.00	280.35	
12/22/14	132540 - Payment received. Thank you.			280.35	0.00	
01/01/15	Invoice C334864		810.03	0.00	810.03	
01/28/15	132776 - Payment received. Thank you.			810.03	0.00	
02/01/15	Invoice C336486		1121.30	0.00	1121.30	
02/24/15	132977 - Payment received. Thank you.			1121.30	0.00	
#	Date	Reference	Description	Qty	Amount	Total
			Balance Forward			0.00

Balance Forward

The amount due on an invoice includes the previous unpaid balance plus the new charges.

Some customers choose not to include or show the previous balance on each invoice. In that case, the invoice represents only new charges.

In the example image above, the Associate has paid in full, so the balance forward is \$0.00.

In the image below, the account history shows this customer still owes \$1239.44, that amount has been included in the detail list as the Balance forward.

		Unpaid Balance	Charges	Credits	New Balance
		\$1239.44	\$18.43	\$0.00	\$1257.87
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Account History (Last 3 Invoices)					
Date	Reference		Charges	Credits	Balance
11/01/14	Invoice C331723		10.80	0.00	730.75
11/14/14	1272 - Payment received. Thank you.			719.95	10.80
01/01/15	Invoice C334967		1111.96	0.00	1122.76
02/01/15	Invoice C336589		116.68	0.00	1239.44
<i>* Your account has unpaid balance from previous invoices. This amount has been included in the total of this invoice. Recent payments may not be reflected on this invoice.</i>					
#Date	Reference	Description	Qty	Amount	Total
		Balance Forward			1239.44

Invoice Detail

The main section of the invoice is the detailed list of each individual charge on the invoice.

At the end of the list of the charges is the invoice subtotal which will be added to the previous balance (if enabled) to show the new amount due.