

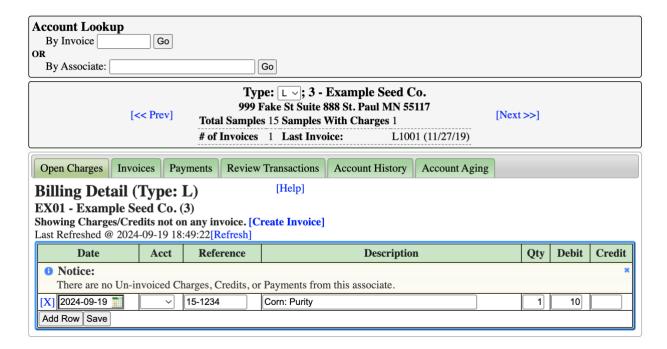
Billing Screen (Associate Accounts)

2024-09-19

Menu: Billing → Associate Accts

This screen shows billing Information for a single customer account.

Lookup account by customer name or by invoice number.

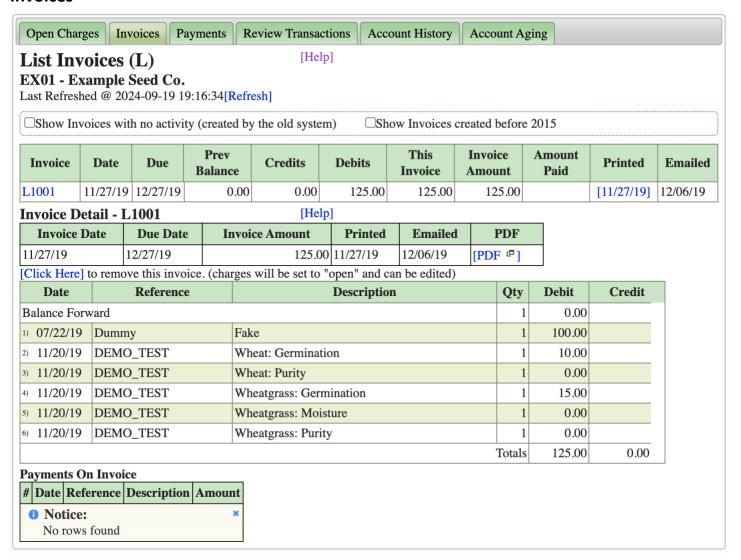


Open Charges (and Credits)

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

You may have the Acct column shown, based on your setup. For the Reference, provide something meaningful, 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



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].)

"This Invoice" indicates the total of the billed items on the invoice. "Invoice Amount" is the amount on the invoice that also includes a previous balance, if any.

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



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.

Open Ch	narges Invoic	es Payr	nents	Review Transa
Date	Reference	Charges	Credits	Balance Due
11/30/21	Invoice L2579	500.00		2403.00
10/29/21	Invoice L2512	500.00		2903.00
04/30/21	Invoice L2035	196.00		3099.00
12/30/20	Invoice L1706	152.00		3251.00
11/30/20	Invoice L1638	223.00		3474.00
10/30/20	Invoice L1554	761.00		4235.00
06/30/20	Invoice L1144	71.00		4306.00

Account Aging

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

See also Account Aging export.