

## Customer Profile: Manage Invoices

The **Invoices** tab [Customers Profile](#) is set up the same way as the [Invoices Module](#). However, it is dedicated to the specific customer only.

Under the **Invoices** tab, you will find the listing of all the **Invoices** that have been prepared for the customer.

The screenshot shows the IndusTrack interface for a customer profile. The 'Invoices' tab is selected, and a list of invoices is displayed. The list includes columns for Date, Number, Est #, Job #, Company, Location, Due Date, Balance, Total, and Status. The invoices are for ABC Company, located at 400 S 4th St., Suite 1000M, Minneapolis, MN, 55415. The statuses are Unpaid, Paid, and Unpaid.

Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
06/02/2023	3482	2837		ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$505.78	\$505.78	Unpaid
05/30/2023	3477			ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	06/14/2023	\$0.00	\$329.00	Paid
05/30/2023	3476			ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	06/14/2023	\$329.00	\$329.00	Unpaid Viewed: 05/30/2023
05/30/2023	3474			ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$173.25	\$173.25	Unpaid

Search for a specific invoice by using the **Search** box.

The screenshot shows the same IndusTrack interface, but with the search box highlighted. The search box is located at the top of the invoice list, next to the 'Date (from/to):' filter. The search box is empty, and the list of invoices is still displayed.

You have the option of filtering the list according to invoice status.

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ABC Company

Tags: Assign

COD

Collection

Do not call

Geofence

EDIT CONTACT

Contact Info:

Billing Address:

Service Location:

Customer Number: 12345

Contact name: John Wilson

Phone: (612) 746-4017

Email: sales@industrack.com

8330 Lovers Ln  
Phillips, WI 54555

400 S 4th St., Suite 1000M  
Minneapolis, MN 55415  
Contract Expiration Date: 07/30/2024

Awaiting Payments  
\$ 5198.03

Invoice overdue  
\$ 0.00

Pending Quotes  
\$ 677.50

Location

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Search

Date (from/to):

Choose a date From...

Choose a date To...

All

Unpaid

Overdue

Paid

CLEAR FILTER

+ ADD NEW

More Actions

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You can also select the invoice dates or periods that you want to view.

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Aside from the customer details, the listing includes the invoice number, estimate number, job number, the date when this was created, the due date, and the status. The status may either be unpaid, overdue, or paid.

By default, the invoices are listed according to the creation date with the newest one on the first line. You can sort the listing according to your preference. Click on the table header to sort the listing according to this.

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The listing also includes the **total invoice value** with the **balance due**. If the total invoice value is different from the balance, a partial or full payment has been made.

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Manage Invoices

From this tab, you can manage the customer's invoices on the list. This is done by selecting an option from the 3-dot menu to the right of the invoice.

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Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
06/12/2023	3488	1223	2848	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$415.00	\$415.00	Unpaid
06/02/2023	3482		2837	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$505.78	\$505.78	Unpaid
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05/30/2023	3474			ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$173.25	\$173.25	Unpaid
05/26/2023	3471	4556	2834	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	06/25/2023	\$500.00	\$500.00	Unpaid
05/26/2023	3469		2811	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$0.00	\$0.00	Unpaid
05/26/2023	3466			ABC Company	3rd location, 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80901		\$1,845.00	\$1,845.00	Unpaid

Edit

Copy/Clone

Preview

Send

Print

View Estimate

View Job Report

Receive Payment

Delete

Create a New Invoice

You can create a new invoice for the customer here. Click the **Create New Invoice** button.

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7/24/23, 4:46 AM

Knowledgebase

The **Adding New Invoice** window will come up. Select the customer's name and location from the list. Click **Proceed** and complete the new invoice.

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Adding New Invoice:

Select Customer:

Service Locations:

ABC Company

400 S 4th St , Suite 1000M, Minneapolis, MN, 55415, USA

John Wilson

400 S 4th St , Suite 1000M, Minneapolis, MN, 55415, USA

3rd location,

3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911, United States

Location 2, Tari walker

10700 West Highway 55 Suite 27, Plymouth, MN, 55441, USA

PROCEED

CANCEL