Customer Profile: Manage Invoices

The **Invoices tab** <u>Customers Profile</u> is set up the same way as the <u>Invoices Module</u>. 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.

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Contact In	fo:			Billing Add	ess:	Service Location:							
Customer Aumber: Contact nam	12345 ne: John Wils	on		8330 Lovers L Phillips, WI 54		400 S 4th St. , Suite 1000M Minneapolis, MN 55415 Contract Expiration Date: 07/30/202-	() \$	Awaiting Payments 5198.03	0	overdue \$ 0.00	0	Quoter \$ 677.50
hone: mail:	(612) 746- sales@inc	-4017 dustrack.c	om										
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Search for a specific invoice by using the **Search box**.

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H BACK			ABC Comp	Dany Tags: Assign Con	ection 🔘	Do not call	Geofance		1	EDIT CONTACT
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06/02	/2023 3482	2837	ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415			\$505.78	\$505.78	Unpaid	1
05/30	/2023 3477		ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415		06/14/2023	\$0.00	\$329.00	Pold	
			ABC			00 h 1 0000	\$329.00	\$329.00	Unpaid Viewed:	
05/30	/2023 3476		Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415		06/14/2023	\$329.00	9928.00	05/30/2023	

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

7/24/23, 4:46 AM

Knowledgebase

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Lustomer lumber: Contact name 'hone: mail:	12345 at John Wilson (612) 746-4017 sales@industra		8330 Lovers Ln Phillips, WI 545		400 S 4th St., Suite 1000M Minneopolis, MN 55415 Contract Expiration Date: 07/30/2024	0	Awaiting Payments \$ 5198.03	0	overdue \$ 0.00	()	Pending Quotes \$ 677.50
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You can also select the invoice dates or periods that you want to view.

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Number:	1345	8330 Lov Phillips, V		400 S 4th St., Suite 1000M Minneapolis, MN 55415 Contract Expiration Date: 07/30/2024	0	Awaiting Payments \$ 5198.03	0	overdue \$ 0.00	()	Pending Quotes \$ 677.50
	ohn Wilson 312) 746-4017 ales@industrack	.com		Contract expiration pate, 0730/2024		φ 0100.00		\$ 0.00		\$ 077.00
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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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- BACK		,	ABC Comp	Dany Tags: Assign Cool Coll	lection Do not call	Geofance 🔘			EDIT CONTACT
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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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Knowledgebase

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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.

IndusT	rack	MAP	CUST	OMER	ESTIMAT	ES SCHEDULE	INVOICES	TIMESHEE	T P.O. RE	PORTS						sei 🗅 🕲 🛊
Email		sales@i	ndustra	ck.com												
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	06/12/20	23 34	488	1223	2848	ABC Company	400 S 4th St, , 9	Suite 1000M, Mir	nneapolis, MN, 55415	5			\$415.00	\$415.00	E.	inonist 🔰 🖡
	06/02/2	023 34	482		2837	ABC Company	400 S 4th St, , 9	Suite 1000M, Mir	nneapolis, MN, 55415	i.			\$505.78	\$505.78		Edit
	05/30/2	023 34	477			ABC Company	400 S 4th St, , !	Suite 1000M, Mir	nneapolis, MN, 55415	5		06/14/2023	\$0.00	\$329.00		Preview
	05/30/2	023 34	476			ABC Company	400 S 4th St, , !	Suite 1000M, Mir	nneapolis, MN, 5541	1		06/14/2023	\$329.00	\$329.00	Vic 05	Send
	05/30/2	023 34	474			ABC Company	400 S 4th St, , 1	Suite 1000M, Mir	nneapolis, MN, 55418	5			\$173.25	\$173.25		View Estimate
	05/26/2	023 34	471	4556	2824	ABC Company	400 S 4th St, , 9	Suite 1000M, Mir	nneapolis, MN, 55415			06/25/2023	\$500.00	\$500.00	1	View Job Report
	05/26/2	023 34	469		2811	ABC Company	400 S 4th St, , !	Suite 1000M, Mir	nneapolis, MN, 55415	i			\$0.00	\$0.00		Receive Payment
	05/26/2	023 34	466			ABC	3rd location, 3 80911	rd location 85 F	Rose Dr, Colorado S	orings, Coloro	ado,		\$1,845.00	\$1,845.00		Delete

Create a New Invoice

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

dusTrack	MAP CU	STOMER	ESTIMATE	S SCHEDULE	INVOICES TIMESHEET P.O. REPOR	TS				303	
BACK			ļ	ABC Comp	COD B	llection 0	Do not call	Geofance			EDIT CONTACT
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Customer lumber: Contact name rhone: mail:	12345 e: John Wilson (612) 748-4017 sales@industr		8330 Lover Phillips, WI		400 5 4th St., Suite 1000M Minneapolis, NN 55415 Contract Expiration Date: 07/30/2024	0	Awaiting Payments \$ 5198.03	0	involce overdue \$ 0.00	0	Pending Quotes \$ 677.50
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🗌 Date 🗸	Numbe	r 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	i
05/30/	2023 3477			ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415		06/14/2023	\$0.00	\$329.00	Pold	1
05/30/	2023 3476			ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415		06/14/2023	\$329.00	\$329.00	Unpeid Viewed: 05/30/2023	I.
				ABC	400 S 4th St. , Suite 1000M, Minneapolis, MN, 55415			\$173.25	\$173.25	Unpaid	

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.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET	P.O. REPORTS 🖳 D 😧 🕸
Adding New Invoice:	Service Locations:
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ABC Company 400 5 4th St, , Suite 1000M, Minneapolis, MN, 55415, USA	John Wilson 400 5 4th St., suite 1000M, Minneepolis, MN, 55415, USA Trai location, 3rd location 88 Rose Dr, Colorado Springs, Colorado, 8091L United States tocation 2, Tari walker 10700 West Highway 55 Suite 27, Plymouth, MN, 5544L USA
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