

Manage Invoices

This menu allows users to create and edit invoices.

Help Files

Click the information icon to access step-by-step instructions for this particular menu.

Search

1) Search for invoices and filter by **Date Range** and **Status**.

Filters:

From: 05/27/2018 To: 07/27/2020 Invoice Status: All

Invoice #	Date	Site	Customer Name	Status	Total
1	08/28/2018	Site 001 - Name	Customer 1	Paid	\$1.00
2	08/28/2018	Site 001 - Name		Paid	\$5.00
3	09/30/2018	Site 001 - Name		Paid	\$50.00
4	09/30/2018	Site 001 - Name		Paid	\$75.00

Expand
2) Click this icon to view quick details about the invoice.

View/Edit
3) Click this button to view, edit, print, or email the selected invoice.

Invoice

Invoice # 1 Delivery Pending Status Paid Payment Applied \$1.00 Balance Due \$0.00

Bill To: Customer

Site: 001 Site 001 - Name (10 Customers)

Customer: Customer 1 Unpaid: \$100.00

Item Code	Quantity	Description	Total
1	1.00	Cal-Safe Snacks-XX	\$1.00

History
4) Click this button to view an audit history of the invoice.

Manage Invoices LINQ

Filters:

From: 05/27/2018

To: 07/27/2020

Invoice Status: All

Add
1) Click this link to create a new invoice.

Invoice #	Date	Site	Customer Name	Status	Total
1					\$1.00

Customer vs. Billing Group
2) Select either **Customer** or **Billing Group** to bill to. This determines the fields that are required.

Required Fields
3) Enter and select the information required from the fields that display.

Invoice Info
4) Select the **Invoice Date**, **Due Date**, and the **Terms**.

Invoice # Pending

Delivery Pending

Status Open

Payment Applied \$0.00

Balance Due \$0.00

Bill To: Customer Billing Group

Site: *Required

Customer:

Attn To:

Address 1:

City:

Email:

Invoice Date: 07/27/2020

Terms:

Billing Method:

Address 2:

State: Zip:

Phone:

Due Date: 07/27/2020

Office Memo:

Item Code	Quantity	Description	Price	Taxable?	Total
<input type="text"/>	1.00	<input type="text"/>	0.00	<input checked="" type="checkbox"/>	\$0.00

Customer Message:

S&H and Tax Rate
7) Enter the **S&H** and **Tax Rate**, if applicable.

Invoice Items
5) Click **Add** to add a new invoice item, and enter the information required in the fields that display.

SubTotal	\$0.00
S & H	0.00
Tax Rate	0.00 %
Sales Tax	\$0.00
Invoice Total	\$0.00