

Administration Overview

Last Modified on 08/19/2020 10:24 am CDT

The overview page gives you insight into your accounts receivable, upcoming payments, and system health.

A/R by Company

Total Balance: **\$72,163.62** | Total Past Due: **\$72,163.62** | Open Invoices: **316** | Customers: **121**

Search A/R by Company

COMPANY NAME	OPEN INVOICES	BALANCE	PAST DUE
Demo Company	4	\$11,332.00	\$11,332.00
Wild Eagle, Inc.	26	\$9,680.75	\$9,680.75
ConnectBooster Demo	1	\$5,856.50	\$5,856.50
Middle Earth Tech Solutions	2	\$3,766.00	\$3,766.00
Cresswell Innovations	7	\$3,196.98	\$3,196.98
Ministry of Magical Technologies	4	\$2,069.64	\$2,069.64
ARC Consulting Group	7	\$1,750.00	\$1,750.00
George Jon, Inc.	10	\$1,615.00	\$1,615.00
Networking Results	10	\$1,525.00	\$1,525.00
SolidCommerce, Inc.	1	\$1,200.00	\$1,200.00

Highest Balances

Legend: Total Due (Blue), Past Due (Grey)

Company	Total Due	Past Due
Demo Company	\$11,332.00	\$11,332.00
Wild Eagle, Inc.	\$9,680.75	\$9,680.75
ConnectBooster	\$5,856.50	\$5,856.50
Middle Earth Tech	\$3,766.00	\$3,766.00
Cresswell Innov	\$3,196.98	\$3,196.98
Ministry of Mag	\$2,069.64	\$2,069.64


Payments Calendar - July 2017

Scheduled: **\$4,719.00** | Autopay: **\$13.55k**

Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Synchronization Status

SYNC DATE	STATUS	OUTPUT
6/15/2017 @@ 1900 UTC	Success	
6/15/2017 @@ 1800 UTC	Success	
6/15/2017 @@ 1700 UTC	Success	

Please use the left hand side menu  in order to navigate the other portal sections.

- Customers
- Reports
- Settings
- Subscriptions
- Online Documentation
- REV Partner Program

A/R by Company

This section shows aggregate values of all your Accounts Receivable, including:

- **Total Balance** - the total balance of all open invoices
- **Total Past Due** - the total balance of all past due invoices

- **Open Invoices** - the count of all open invoices
- **Companies** - the count of companies that have an open invoice balance

The company list allows you to search and sort companies with open A/R. To view all customers, navigate to the Customers page from the site navigation or “All Customers” button, or use the global “Find Customers” customer search.

A/R by Company

Total Balance	Total Past Due	Open Invoices	Customers
\$72,163.62	\$72,163.62	316	121

Search A/R by Company

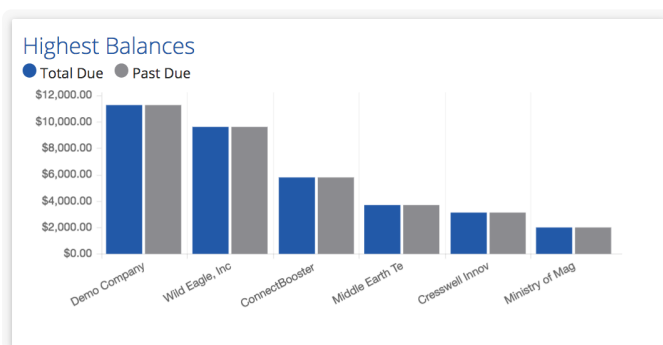
COMPANY NAME	OPEN INVOICES	BALANCE ^	PAST DUE
Demo Company	4	\$11,332.00	\$11,332.00
Wild Eagle, Inc.	26	\$9,680.75	\$9,680.75
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< 1 2 3 ... 13 >

ALL CUSTOMERS

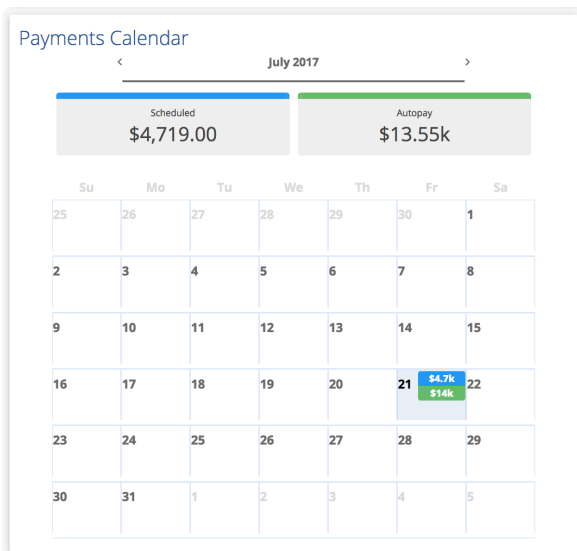
Highest Balances

A visual interpretation of the top six customers with past due and open invoice balances.



Payments Calendar

The calendar lists any upcoming payments on the day they are scheduled. This includes scheduled payments and AutoPay. Note, only invoices in the system will display on the calendar. Both unapproved and approved AutoPay will be shown - please see AutoPay setup for more information on AutoPay approval.



Synchronization Status

The three latest synchronizations are shown in this section. Details include:

- **Sync Date** - The time and date the synchronization ran
- **Status** - The status of the sync, possible values are Success, Running and Failed
- **Output** - When available, a download of the output is listed

Synchronization Status >

SYNC DATE	STATUS	OUTPUT
6/15/2017 @@ 1900 UTC	Success	
6/15/2017 @@ 1800 UTC	Success	
6/15/2017 @@ 1700 UTC	Success	

Notifications

Items and warnings that require attention will be displayed at the top of the overview page. These notifications may include:

- Payments failing to sync
- Unresolved ACH/EFT returns
- AutoPay payments needing approval

The screenshot shows the Connect Booster dashboard. At the top, there is a notification bar with a red border containing the text '8 AutoPay Payments need Approval' and an 'APPROVE NOW' button. Below this, there are two summary cards. The left card, 'A/R by Company', displays: Total Balance \$73,757.57, Total Past Due \$68,856.62, Open Invoices 317, and Customers 121. The right card, 'Highest Balances', shows a bar chart with a legend for 'Total Due' (blue) and 'Past Due' (grey), with a scale from \$15,000.00 to \$20,000.00.

