

Open Invoices

Last Modified on 03/04/2019 3:55 pm CST

From the Profile Overview page, you can directly pay invoices.

INVOICE	BALANCE	TOTAL	DUE DATE	MORE	
<input type="checkbox"/> QBINV123500	\$8,709.00	\$9,990.00	8/22/18	MORE	
<input checked="" type="checkbox"/> CB6375	\$19,688.00	\$20,600.00	12/15/18	MORE	
<input type="checkbox"/> CB6379	\$8,000.00	\$9,000.00	1/22/19	MORE	
<input checked="" type="checkbox"/> CB6380	\$1,300.00	\$1,300.00	3/1/19	MORE	

Selecting one or multiple invoices will allow you to use the "Pay Selected" option to quickly make a payment on the client's behalf.


- *The red alarm clock dictates this invoice is past due.*

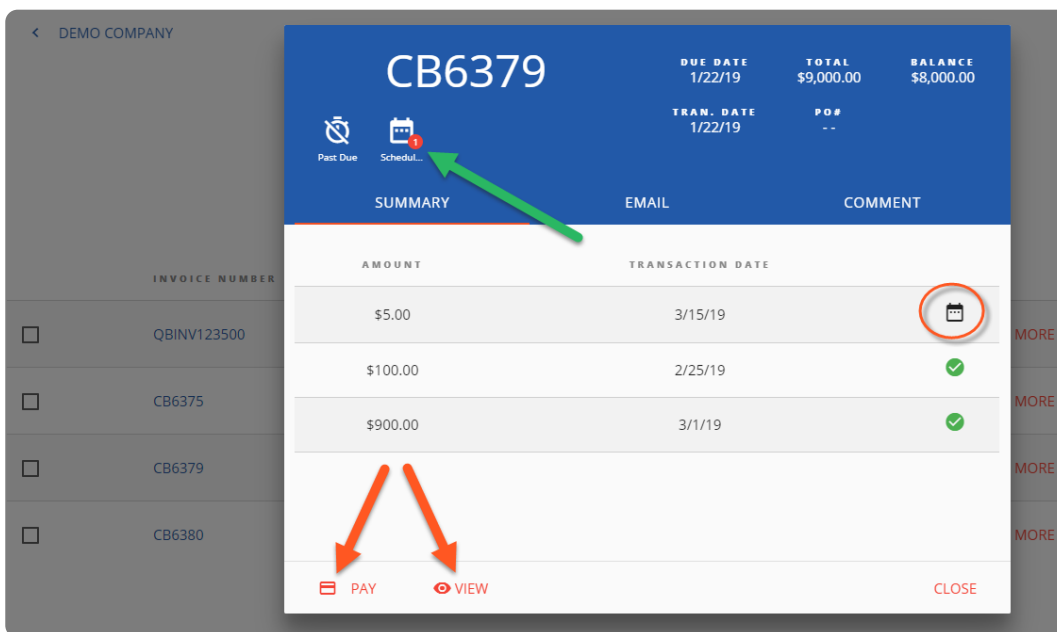
Clicking on "Open Invoices" will bring you to the dedicated Open Invoices page. This is useful when dealing with a larger quantity of invoices. Selecting an invoice will again enable the "Pay Selected" button.

INVOICE NUMBER	BALANCE	TOTAL	DUE DATE	MORE	
<input type="checkbox"/> QBINV123500	\$8,709.00	\$9,990.00	8/22/18	MORE	
<input checked="" type="checkbox"/> CB6375	\$19,688.00	\$20,600.00	12/15/18	MORE	
<input type="checkbox"/> CB6379	\$8,000.00	\$9,000.00	1/22/19	MORE	
<input checked="" type="checkbox"/> CB6380	\$1,300.00	\$1,300.00	3/1/19	MORE	

Clicking "MORE"  will yield the invoice summary window.

The invoice summary displays additional data about the selected invoice(s) such as the balance remaining, and due date. If any payments are pending, scheduled or set to AutoPay against the invoice they will also be shown here. See [Invoice Summary](#) for additional details.

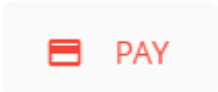
From here you may "VIEW"  to pull the exact PDF copy of the invoice from your integrated CRM or Accounting Package (If *QuickBooks Desktop* is your preferred invoice version, we will render the invoice image).



In the example above, a "Scheduled Payment" has been manually set to process (for the future date 3/15/19 in the amount of \$5.00).

However ~ we want to make additional payments before then!

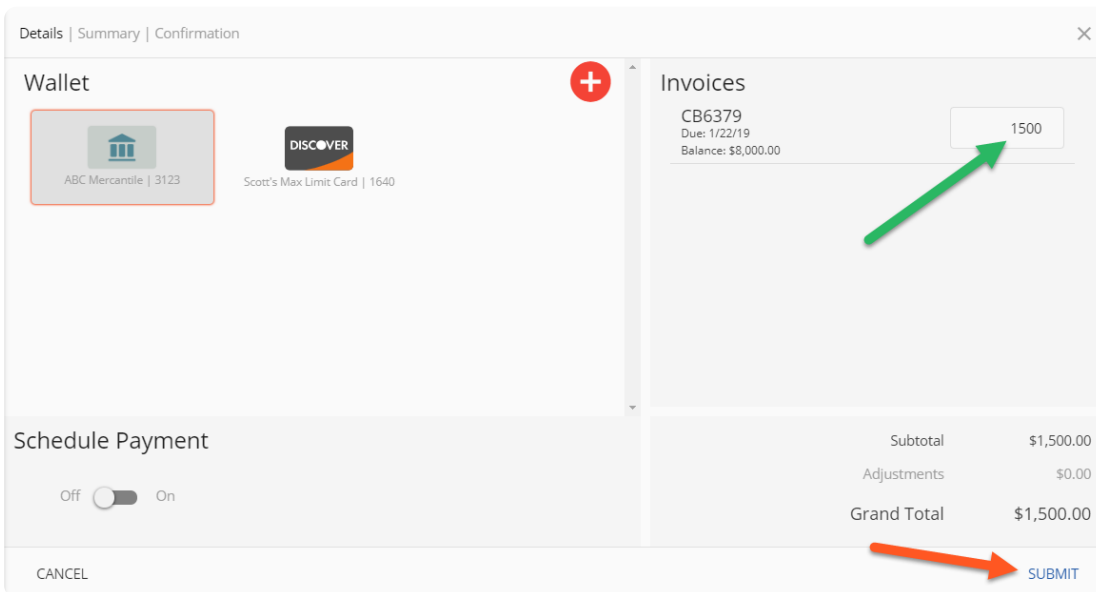
- The system will intelligently decide if doing so impacts tentative payments in anyway shape or form. If necessary, adjustments will be made to prevent an overage payment.

Selecting "Pay"  will bring you to the Payment Details page.

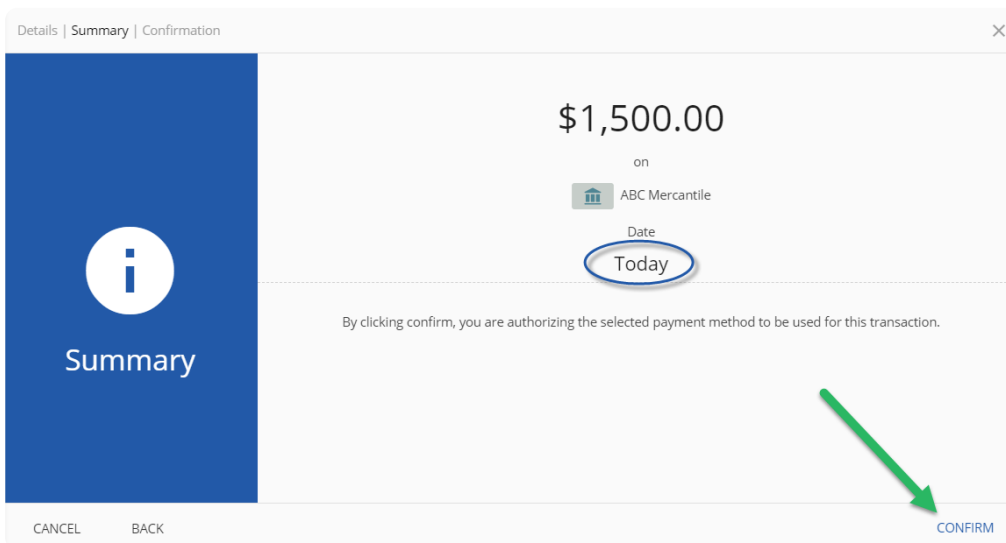
The steps needed to finalize the payment:

- Enter the amount (we put in a partial amount of \$1,500 for the example)

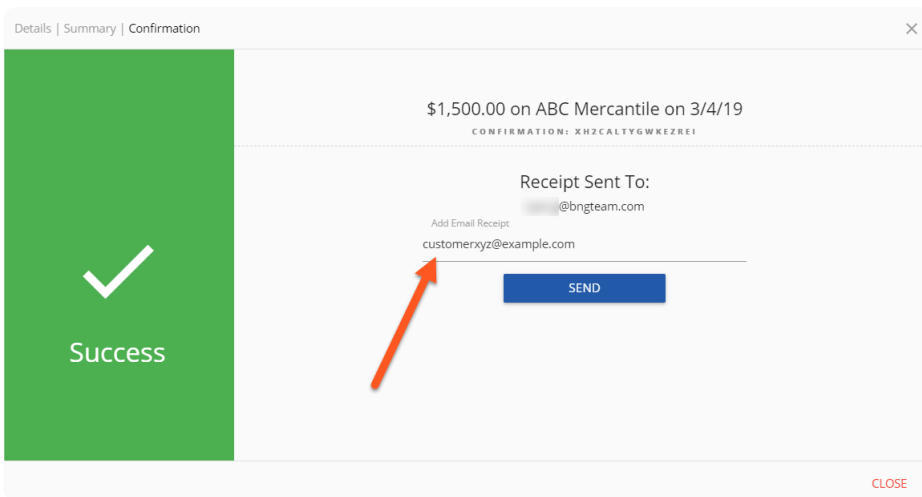
- Select the payment method to use (we decided to use a Bank Account)
- (We are making the payment immediately by NOT selecting "Schedule Payment")



Select "Submit". For the Summary Page.



Lastly select "Confirm" The payment will initiate or schedule appropriately. The payment confirmation window appears, and the automated email receipt sends out.



- *Only contacts with eligible profile levels will receive the email.*

If a copy of the transaction receipt email is needed, you may simply add another recipient and click "Send" before closing this window.