

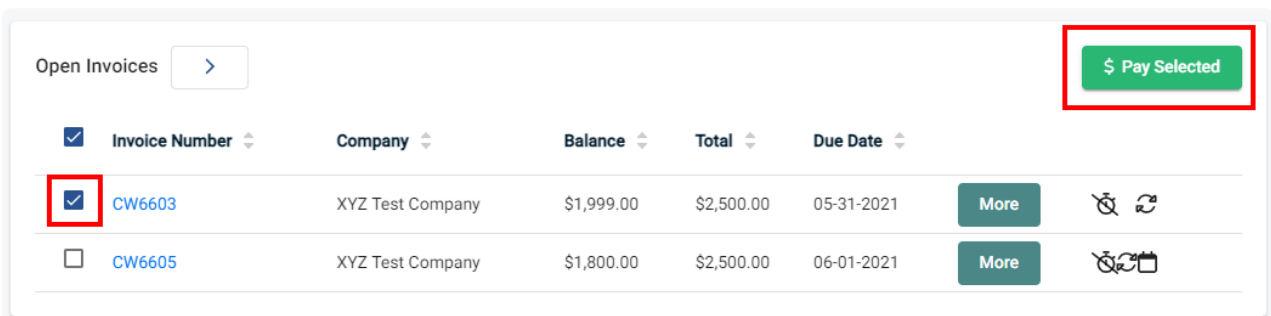
Open Invoices - Internal User

Last Modified on 02/02/2024 11:08 am CST

Exciting news! Our ConnectBooster Support documentation is moving to a new location. Be sure to bookmark the new link below.

<https://help.cb.kaseya.com/help/Content/0-HOME/Home.htm>

When you are viewing Organization Details, you have the ability to make payments towards open invoices on behalf of your organizations. Scrolling to Open Invoices, you can select the invoice(s) you wish to pay and then choose "PAY SELECTED".

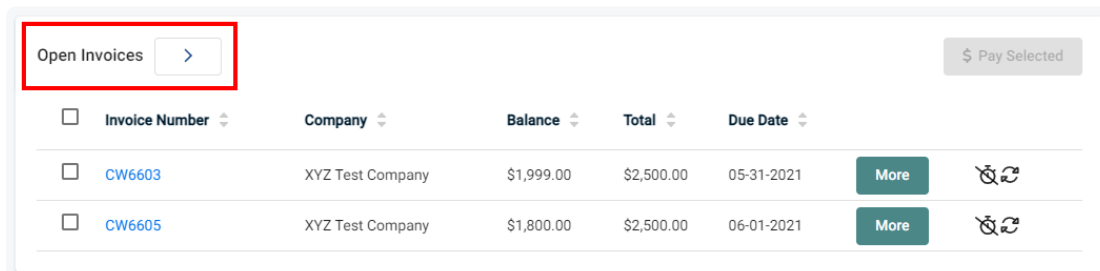


The screenshot shows the 'Open Invoices' section of a user interface. At the top left, there is a button labeled 'Open Invoices' with a right-pointing arrow. At the top right, a green button labeled '\$ Pay Selected' is highlighted with a red rectangular box. Below this is a table with the following columns: 'Invoice Number', 'Company', 'Balance', 'Total', 'Due Date', 'More', and two icons. The first row shows an invoice with ID 'CW6603', company 'XYZ Test Company', a balance of '\$1,999.00', a total of '\$2,500.00', and a due date of '05-31-2021'. The second row shows an invoice with ID 'CW6605', company 'XYZ Test Company', a balance of '\$1,800.00', a total of '\$2,500.00', and a due date of '06-01-2021'. The 'More' button and icons for each row are also visible.

| <input checked="" type="checkbox"/> | Invoice Number | Company | Balance | Total | Due Date | More | | |
|-------------------------------------|----------------|------------------|------------|------------|------------|------|--|--|
| <input checked="" type="checkbox"/> | CW6603 | XYZ Test Company | \$1,999.00 | \$2,500.00 | 05-31-2021 | More | | |
| <input type="checkbox"/> | CW6605 | XYZ Test Company | \$1,800.00 | \$2,500.00 | 06-01-2021 | More | | |

- The dictates this invoice is past due.
- The indicates a scheduled payment.
- The indicates that invoice is tied to an autopay rule for that organization.

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.



The screenshot shows the 'Open Invoices' section of a user interface. At the top left, a button labeled 'Open Invoices' with a right-pointing arrow is highlighted with a red rectangular box. At the top right, a grey button labeled '\$ Pay Selected' is visible. Below this is a table with the following columns: 'Invoice Number', 'Company', 'Balance', 'Total', 'Due Date', 'More', and two icons. The first row shows an invoice with ID 'CW6603', company 'XYZ Test Company', a balance of '\$1,999.00', a total of '\$2,500.00', and a due date of '05-31-2021'. The second row shows an invoice with ID 'CW6605', company 'XYZ Test Company', a balance of '\$1,800.00', a total of '\$2,500.00', and a due date of '06-01-2021'. The 'More' button and icons for each row are also visible.

| <input type="checkbox"/> | Invoice Number | Company | Balance | Total | Due Date | More | | |
|--------------------------|----------------|------------------|------------|------------|------------|------|--|--|
| <input type="checkbox"/> | CW6603 | XYZ Test Company | \$1,999.00 | \$2,500.00 | 05-31-2021 | More | | |
| <input type="checkbox"/> | CW6605 | XYZ Test Company | \$1,800.00 | \$2,500.00 | 06-01-2021 | More | | |

< XYZ Test Company


Open Invoices

Search by Invoice Number Q Pay Selected


0 selected

| <input type="checkbox"/> | Invoice Number | Company | Balance | Total | Due Date | More | |
|--------------------------|----------------|------------------|------------|------------|------------|------|--|
| <input type="checkbox"/> | CW6603 | XYZ Test Company | \$1,999.00 | \$2,500.00 | 05-31-2021 | More | |
| <input type="checkbox"/> | CW6605 | XYZ Test Company | \$1,800.00 | \$2,500.00 | 06-01-2021 | More | |

Showing 1 - 2 of 2 items < 1 > 10 rows per page

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.

From here you may  to pull the exact PDF copy of the invoice from your integrated CRM/PSA or Accounting Package (If QuickBooks Desktop is your preferred invoice version, we will render the invoice image from a globally stored template within the portal).

CW6603

COMPANY
XYZ Test Company

| | | |
|-----------------|--------------|----------------|
| DUE DATE | TOTAL | BALANCE |
| 05-31-2021 | \$2,500.00 | \$1,999.00 |

| | |
|-------------------|------------|
| TRAN. DATE | PO# |
| 05-01-2021 | - |

Summary
Email
Comment

AUTOPAY

AutoPay when Invoice Contract Is any of the following CB MSP

TRANSACTIONS


| Amount | Transaction Date | |
|------------|------------------|--|
| \$2,002.32 | 02-17-2022 | |
| \$2.00 | 09-15-2021 | |

Close
Pay
View


In the example above, the invoice matches an existing AutoPay rule set up on this specific company.

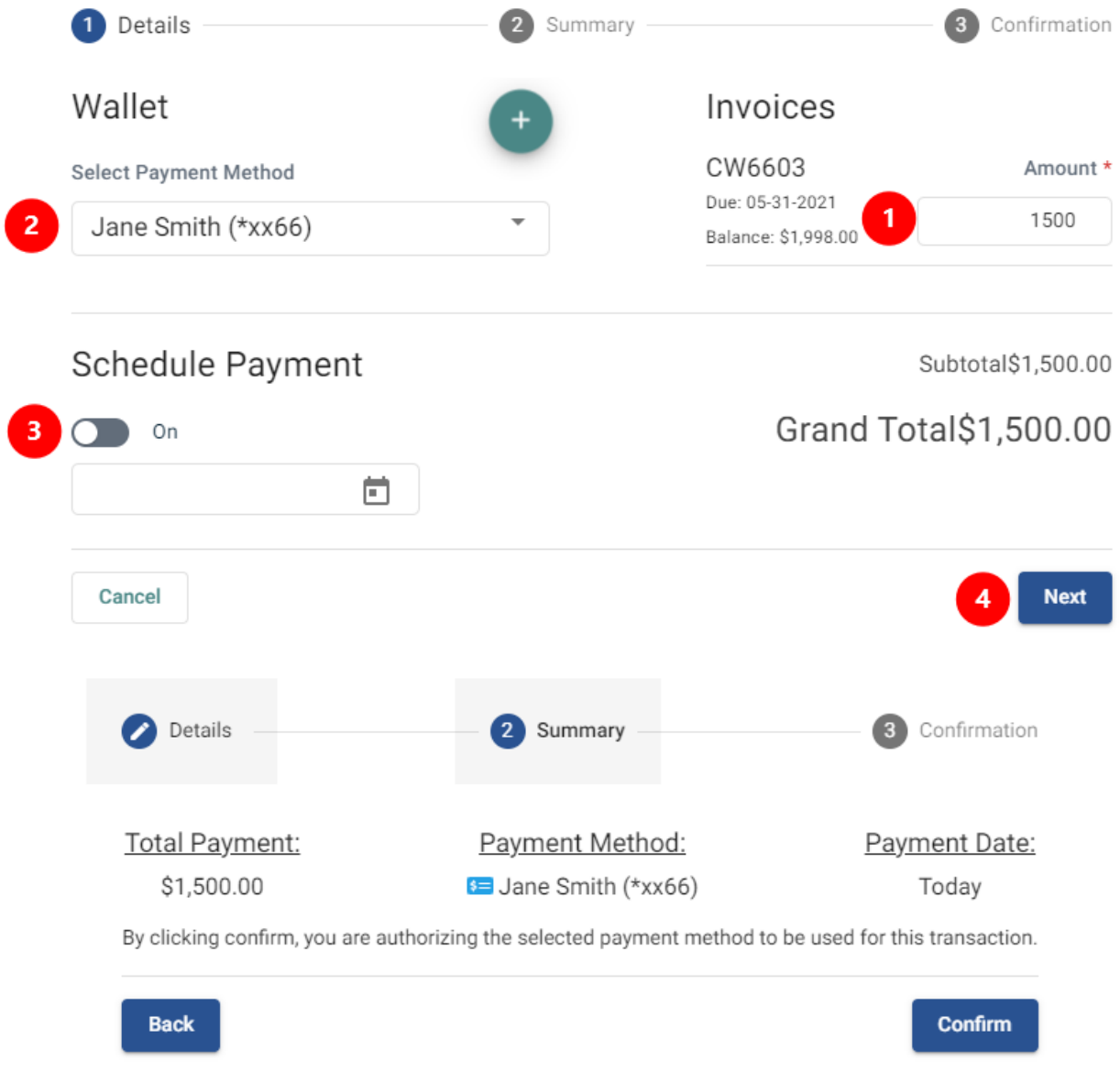
However ~ we want to make additional payments before then!

- 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:


1. Enter the amount (we put in a partial amount of \$1,500 for the example)
2. Select the payment method to use, or you can add a new payment method by selecting the 
3. We are making the payment immediately by NOT select the "Schedule Payment" toggle switch
4. Select "Next" for the Summary Page



The screenshot shows a payment interface with three main sections: 'Wallet', 'Invoices', and 'Schedule Payment'. A progress bar at the top indicates three steps: 1. Details, 2. Summary, and 3. Confirmation. In the 'Wallet' section, a dropdown menu for 'Select Payment Method' is open, showing 'Jane Smith (*xx66)' with a red '2' next to it. A green plus icon is visible above the dropdown. In the 'Invoices' section, an invoice for 'CW6603' is shown with a due date of '05-31-2021' and a balance of '\$1,998.00'. A red '1' is next to the 'Amount' field, which contains '1500'. Below the invoice, the 'Schedule Payment' section has a toggle switch set to 'On' with a red '3' next to it. A date picker is visible below the toggle. To the right, the 'Subtotal' is '\$1,500.00' and the 'Grand Total' is '\$1,500.00'. At the bottom of the 'Schedule Payment' section, there is a 'Cancel' button and a 'Next' button with a red '4' next to it. Below this, a summary bar shows three steps: 1. Details, 2. Summary, and 3. Confirmation. The 'Summary' step is highlighted. Below the summary bar, there are three columns: 'Total Payment: \$1,500.00', 'Payment Method: Jane Smith (*xx66)', and 'Payment Date: Today'. A disclaimer states: 'By clicking confirm, you are authorizing the selected payment method to be used for this transaction.' At the bottom, there are 'Back' and 'Confirm' buttons.

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

Details Summary **3** Confirmation




Payment Successful

Payment Details
██████████
██████████


Confirmation
ZEqjflk6N0mh4he

Receipt Sent to:
██████████

Send copy: 

Close

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

If a copy of the transaction receipt email is needed, you may add another recipient by selecting  , and then enter in the additional recipient email(s).

Add Email

Recipients

Cancel

Add Email