

Viewing Invoices

Last Modified on 02/02/2024 11:17 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>

The summary of an invoice can be viewed from multiple areas including Invoice History, Open Invoices, AutoPay Approval, among other places. Details on an invoice summary include:

- Due Date
- Total
- Open Balance
- Purchase Order #
- Transaction Date
- Invoice attributes including if the invoice is pending payment, has a scheduled payment, or meets criteria for an AutoPay rule
- A summary of payments applied to the invoice
- A description of matching AutoPay rules

Actions available on an invoice summary include:

- Pay (shown when there is a remaining balance on the invoice)

QB21008

COMPANY
Ponderosa Ranch



DUE DATE **TOTAL** **BALANCE**
02-19-2022 \$1,075.00 \$1,075.00

TRAN. DATE **PO#**
01-20-2022 -

Summary Email Comment

AUTOPAY

AutoPay when Invoice Item Descriptions Contains Managed Services

TRANSACTIONS

| Amount | Transaction Date | |
|----------|------------------|--|
| \$6.00 | 05-24-2023 | |
| \$2.00 | 05-24-2023 | |
| \$2.00 | 05-24-2023 | |
| \$6.00 | 05-24-2023 | |
| \$201.00 | 05-24-2023 | |

Cancel

View

Pay

- View - Shows a rendering of the invoice based on the Invoice Image Data setting in the [Billing configuration](#)

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| | | |
|-------------------|--------------|----------------|
| DUE DATE | TOTAL | BALANCE |
| 02-19-2022 | \$1,075.00 | \$1,075.00 |
| TRAN. DATE | PO# | |
| 01-20-2022 | - | |

[Summary](#) [Email](#) [Comment](#)

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Cancel

View

Pay

- Email Invoice (tenant administrators) - An invoice notification will be sent to the company's Default Contacts with the ability to add additional recipients not listed as a default contact. This email uses the Invoice Notification template found in the [Organization Emails configuration](#).

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TRAN. DATE PO#
01-20-2022 -

  

Summary Email Comment

Email Invoice

- View Email History (tenant administrators) - View all email history associated to the invoice -- Invoice Notifications, Account Summary, etc.

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TRAN. DATE
01-20-2022

PO#
-

[Summary](#) [Email](#) [Comment](#)

Email Invoice

| | | |
|--------------------------------------|-----------------------------------|---|
| <i>05-14-2023</i> <i>08:01 PM</i> | Invoice Notification | ▼ |
| <i>04-14-2023</i> <i>08:00 PM</i> | Invoice Notification | ▼ |
| <i>03-22-2023</i> <i>08:01 PM</i> | Invoice QB21008 is 397 Days Pas | ▼ |
| <i>03-14-2023</i> <i>08:01 PM</i> | Invoice Notification | ▼ |
| <i>03-01-2023</i> <i>10:45 AM</i> | New Scheduled Transaction for \$: | ▼ |
| <i>02-01-2023</i> <i>12:28 PM</i> | New Scheduled Transaction for \$: | ▼ |
| <i>12-14-2022</i> <i>07:00 PM</i> | Invoice Notification | ▼ |
| <i>04-29-2022</i> <i>03:11 PM</i> | New Scheduled Transaction for \$: | ▼ |
| <i>03-30-2022</i> <i>02:37 PM</i> | New Scheduled Transaction for \$: | ▼ |
| <i>03-18-2022</i> <i>02:18 PM</i> | New Scheduled Transaction for \$: | ▼ |

Cancel

View

Pay

- Comment Tab: The comment tab can be used by your clients should they have a question on a particular invoice. NOTE: ConnectBooster is not a two-way form of communication, so you will not be able to reply to your clients through the portal and these comments will **NOT** be stored. It is just a way to get the conversation started should questions come up on your client side.

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| TRAN. DATE | PO# |
|------------|-----|
| 01-20-2022 | - |

Summary

Email

Comment

Leave A Comment

Add a comment.

Submit Comment

Cancel

View

Pay

The recipients of these notifications are managed under [Configurations + Internal Settings + Notifications](#).