

AR History – Option to Add/Remove Service Record Line Items for Single Invoices (13941) [Enhancement]

Last Modified on 01/23/2023 3:07 pm EST

Single invoices generated from a customer's account have been updated to allow users to add or remove service record line items before generating the invoice. With this change, recurring services will display grouped together as one line item and a unique record will display for each manual charge and work order.

AR HISTORY

CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	91-120 DAYS	120+ DAYS	TOTAL
0.00	0.00	0.00	0.00	0.00	1,606.93	1,606.93

LIMIT TO OPEN ITEMS
 STATEMENT
 INVOICE
 AUTO APPLY
 BALANCE WRITE OFF
 CREDIT CARDS ON FILE

DATE	DUE DATE	PERIOD	SITE ID	TYPE	REFERENCE NO	AMOUNT	APPLIED AMOUNT	BALANCE
03/31/22	03/31/22	2022-03	3266003	Invoice	878118	218.09		218.09
03/31/22	03/31/22	2022-03	3266002	Invoice	878117	264.04		264.04
01/31/22	01/31/22	2022-01	3266003	Invoice	876297	304.95		304.95
01/31/22	01/31/22	2022-01	3266002	Invoice	876296	369.15		369.15

CREATE CUSTOMER INVOICE

BILL TO DATE: 10/31/2022
 INVOICE DATE: 08/22/2022
 This Site

<input checked="" type="checkbox"/> SITE ID	START DATE	END DATE	GROSS QTY	NO CHARGE QTY	QTY	NAME	PO #	AMOUNT	SURCHARGES	TAXES	TOTAL
<input checked="" type="checkbox"/> Recurring Service 103788 - Standard Toilet Service											
<input checked="" type="checkbox"/> 3266002	04/01/22	04/30/22			1	Standard Toilet Service		\$ 115.00	\$ 0.00	\$ 8.05	\$ 123.05
<input checked="" type="checkbox"/> 3266002	05/01/22	05/31/22			1	Standard Toilet Service		\$ 115.00	\$ 0.00	\$ 8.05	\$ 123.05
<input checked="" type="checkbox"/> 3266002	06/01/22	06/30/22			1	Standard Toilet Service		\$ 115.00	\$ 0.00	\$ 8.05	\$ 123.05
<input checked="" type="checkbox"/> 3266002	07/01/22	07/31/22			1	Standard Toilet Service		\$ 115.00	\$ 0.00	\$ 8.05	\$ 123.05
<input checked="" type="checkbox"/> 3266002	08/01/22	08/31/22			1	Standard Toilet Service		\$ 115.00	\$ 0.00	\$ 8.05	\$ 123.05
<input checked="" type="checkbox"/> 3266002	09/01/22	09/30/22			1	Standard Toilet Service		\$ 115.00	\$ 0.00	\$ 8.05	\$ 123.05
<input checked="" type="checkbox"/> 3266002	10/01/22	10/31/22			1	Standard Toilet Service		\$ 115.00	\$ 0.00	\$ 8.05	\$ 123.05
<input checked="" type="checkbox"/> Work Order 3628365 - 08-04-22 - Standard Toilet Service											
<input checked="" type="checkbox"/> 3266002	08/04/22		1	0	1	Delivery Fee		\$ 40.00	\$ 0.00	\$ 2.80	\$ 42.80
<input checked="" type="checkbox"/> Manual Charge 11513 - 08-02-22 - Disposal Fee											
<input checked="" type="checkbox"/> 3266002	08/02/22				1	Disposal Fee		\$ 115.43	\$ 0.00	\$ 8.08	\$ 123.51
<input checked="" type="checkbox"/> Manual Charge 11514 - 08-03-22 - Account Adjustment											
<input checked="" type="checkbox"/> 3266002	08/03/22				1	Account Adjustment		\$ (35.00)	\$ 0.00	\$ 0.00	\$ (35.00)

GENERATE INVOICE

Pathway: Customer > Search > AR History (Customer Details)

Article: [Generate Single Invoice](#)