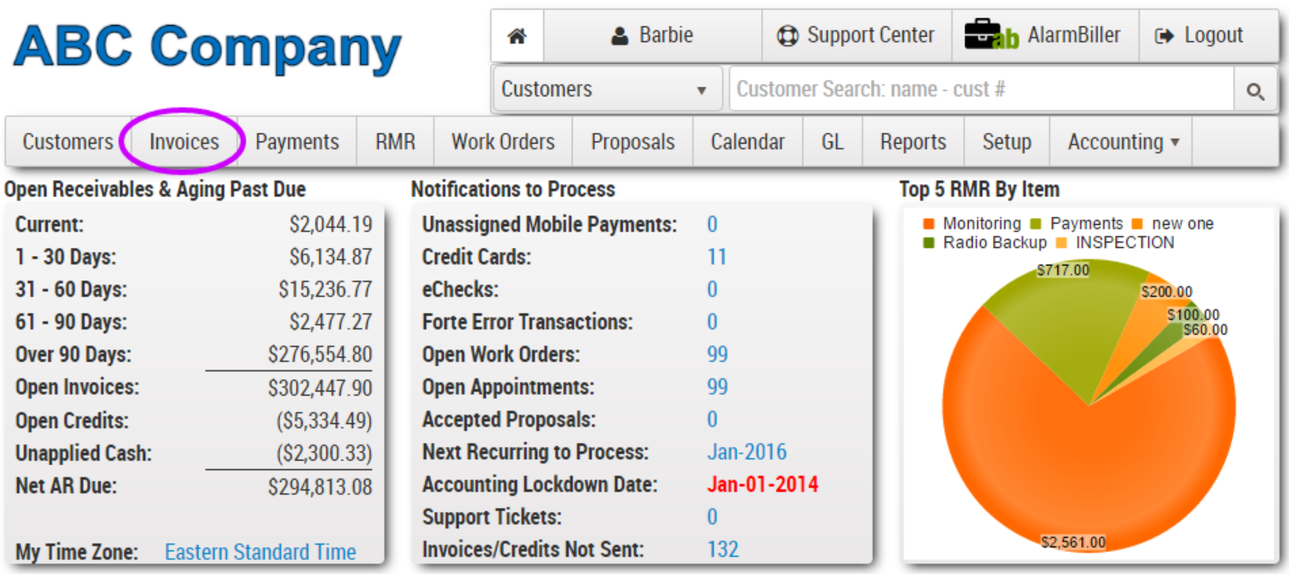
Invoices Page

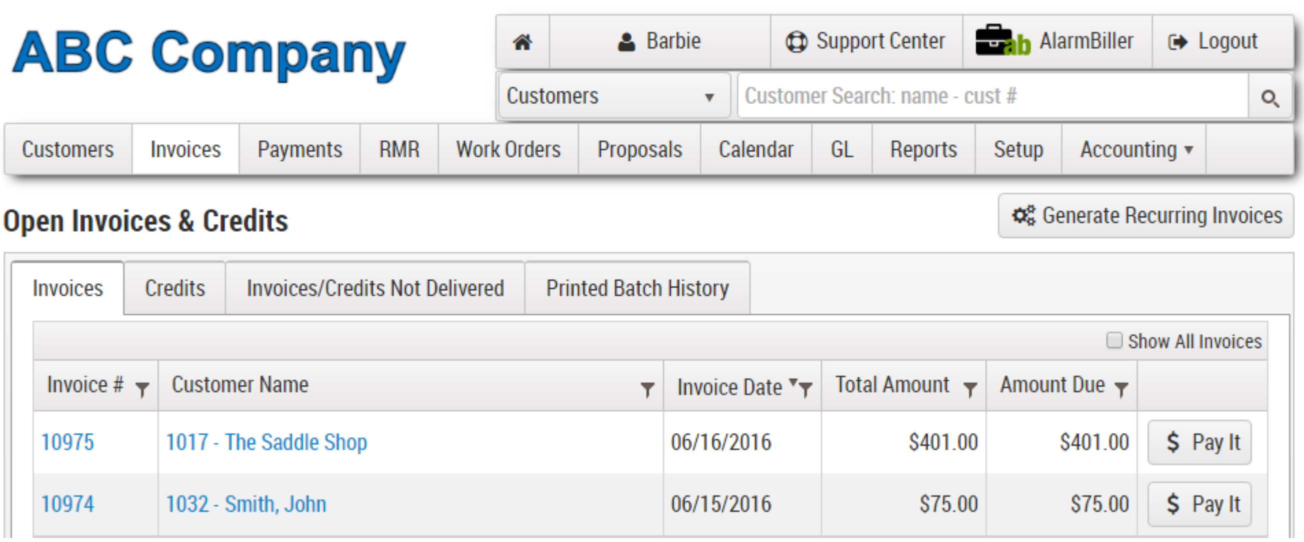
Last Modified on 11/08/2016 10:02 pm EST

Accessing Invoices Page

To access lists of your Invoices, Credits, Invoices/Credits Not Delivered, and Printed Batch History at the dealer level click Invoices on the upper left side of the page:



The Invoices page willl appear:



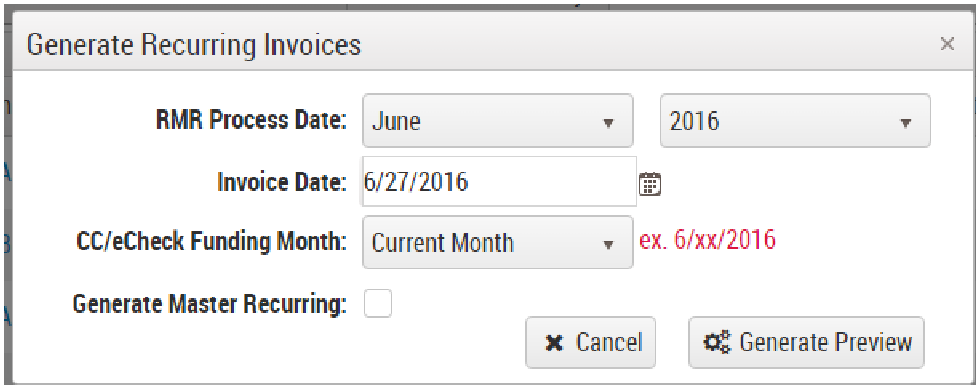
Generate Recurring Invoices

*Note: This is the manual process for generating recurring invoices. AlarmBiller can also perform this process for you auti matically (hyperlink).

Generate Recurring Invoices

Click "Generate Recurring Invoices" to generate recurring invoices at a dealer level. you can also do this at a customer level.

A "Generate Recurring Invoices" box will appear:



RMR Process Date

Select the month you are generating invoices for. This is the month for which you want to charge services.

Invoice Date

Select the date you wish to appear on the invoice. Your aging and due date are reflected from this date.

CC/eCheck Funding Month

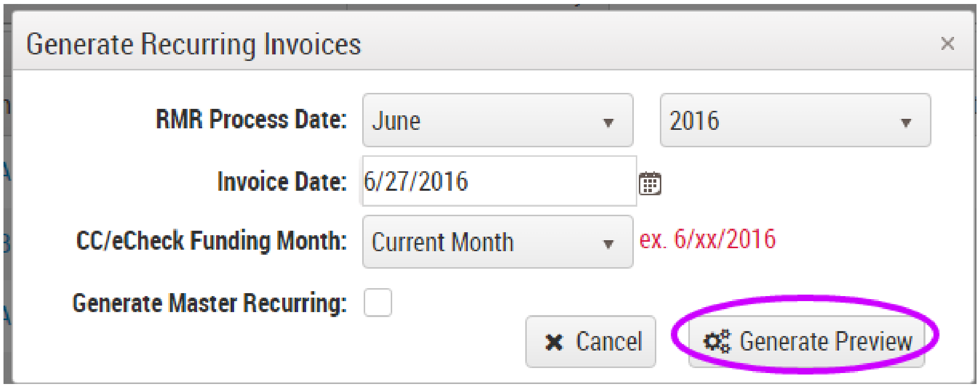
Select the month that your autopay customers will be paying for from the dropdown box. An example for clarification is provided in red text to the right of the dropdown box.

Generate Master Recurring

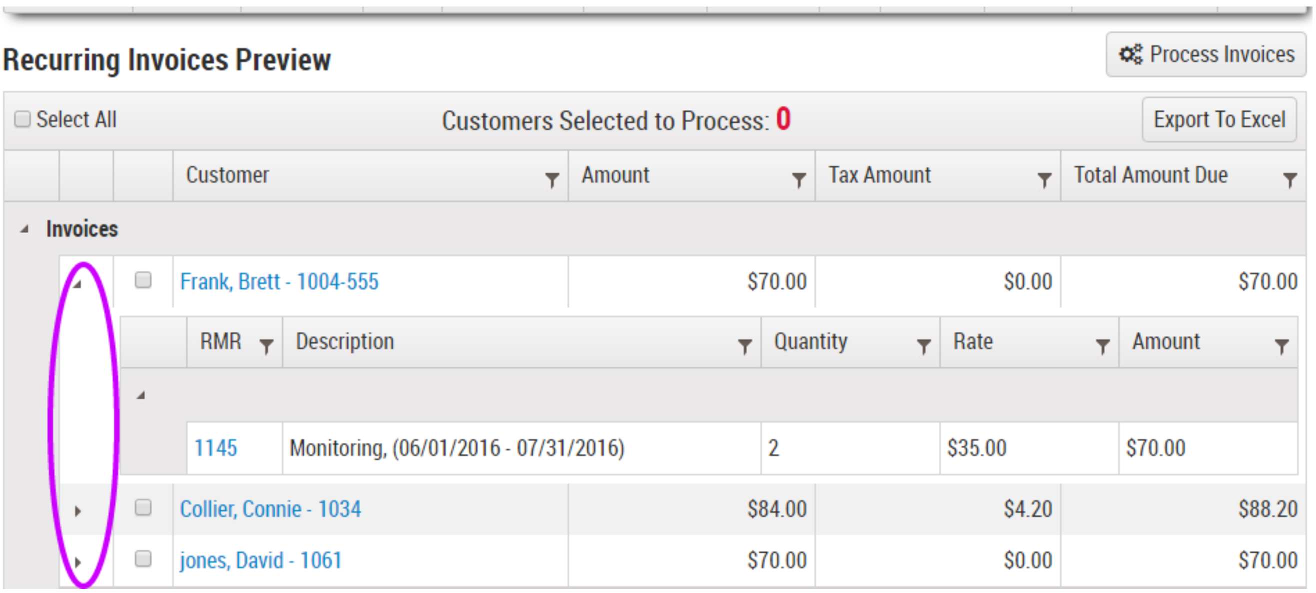
If you have any recurring items that are being billed directly to a master customer you will need to generate recurring invoices twice, once without checking the "Generate Master Recurring" box and then again with the box checked.

Generate Preview

To proceed, click "Generate Preview" in the bottom right corner of the box:

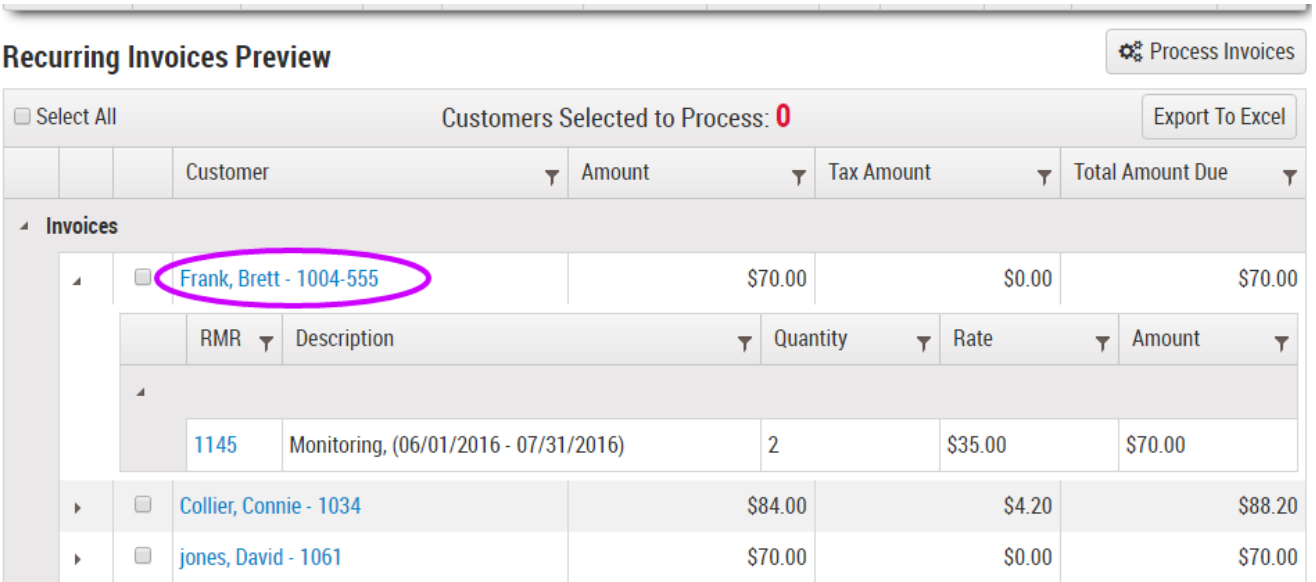


This will take you to the "Recurring Invoices Preview" page. This shows a list of all your customers with recurring items within the RMR process date you selected. Click the arrow to the left of the customer's name to view details about the charges for their recurring item(s) and date range the rmrs are being processed for.



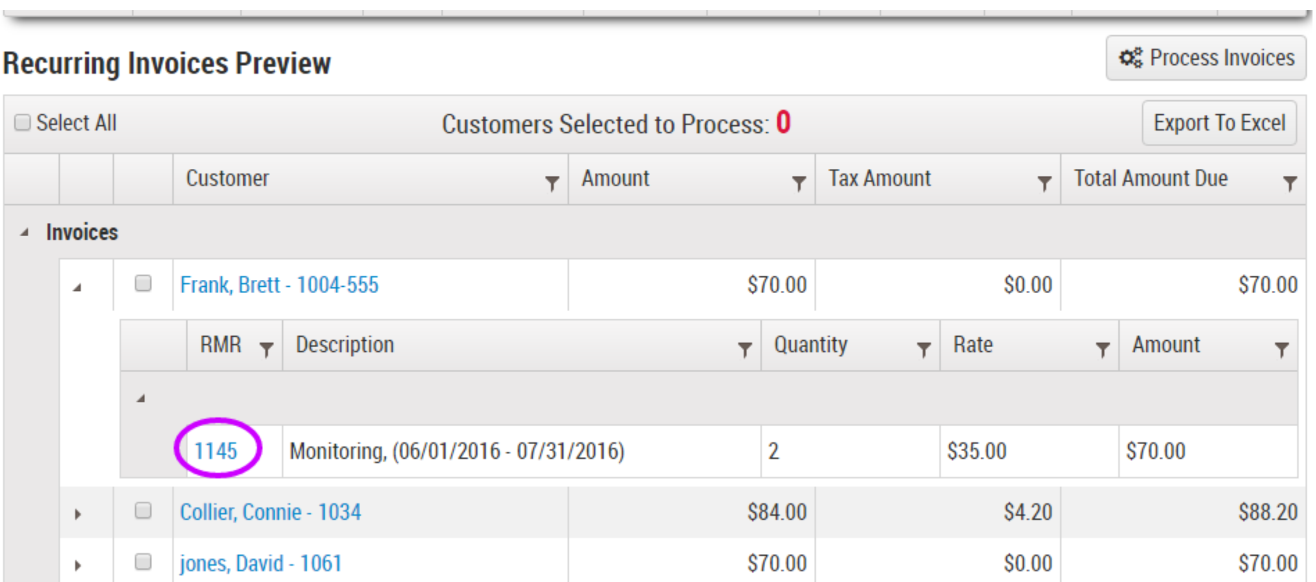
Customer Manager Page

Click the blue "Customer" hyperlink to view the customer manager page linked to the RMR(s). This will will provide you with detailed information about the customer.



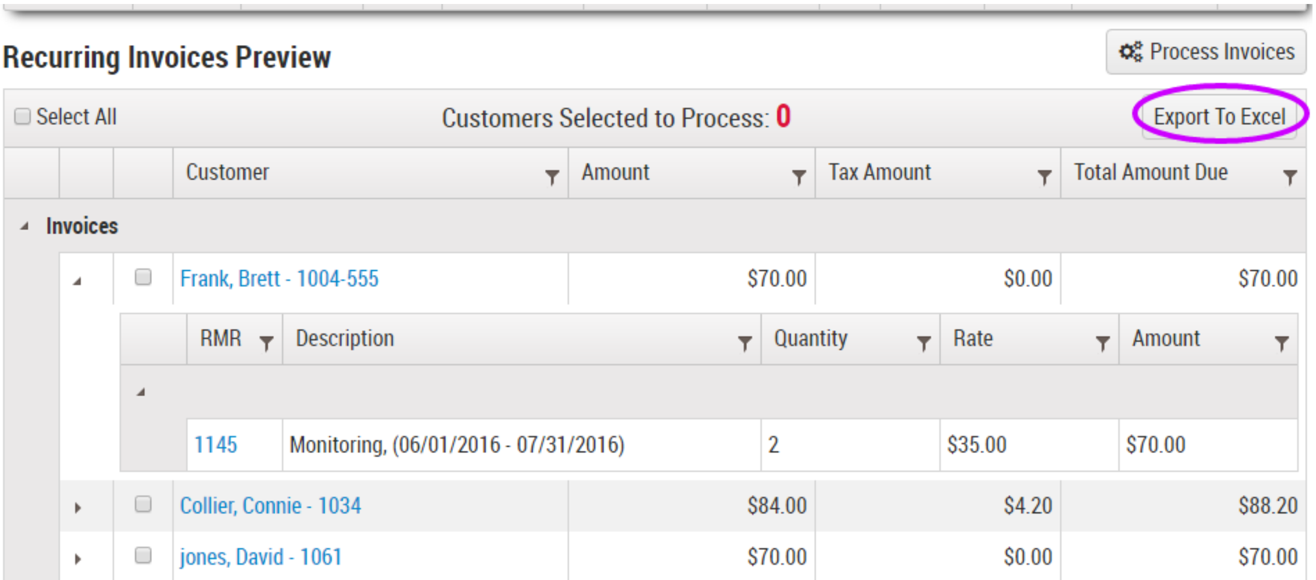
Customer RMR page

Click the blue "RMR" hyperlink to the left of the recurring item to view the customer RMR page. This will provide you with detailed information about the RMR.

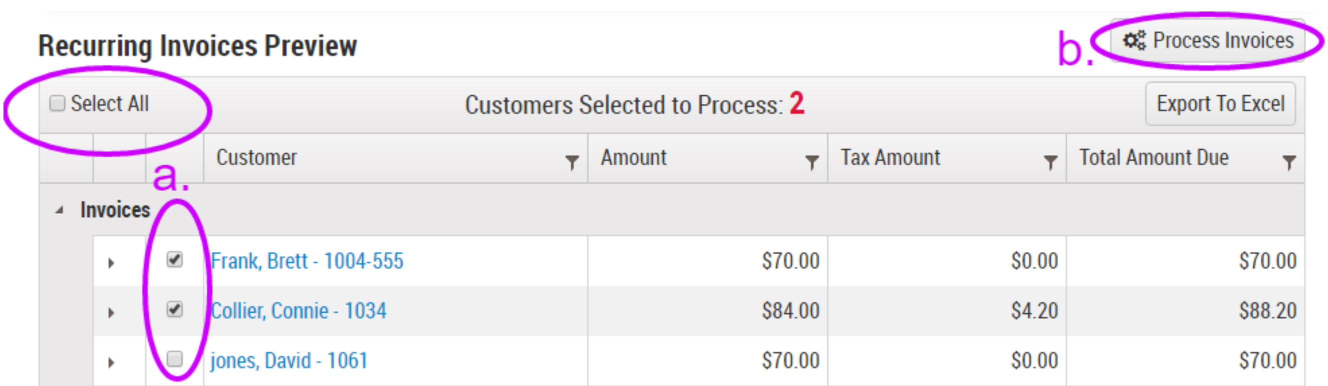


Export To Excel

Click "Export To Excel" to download an excel file of this customer list to your documents.



Process Invoices

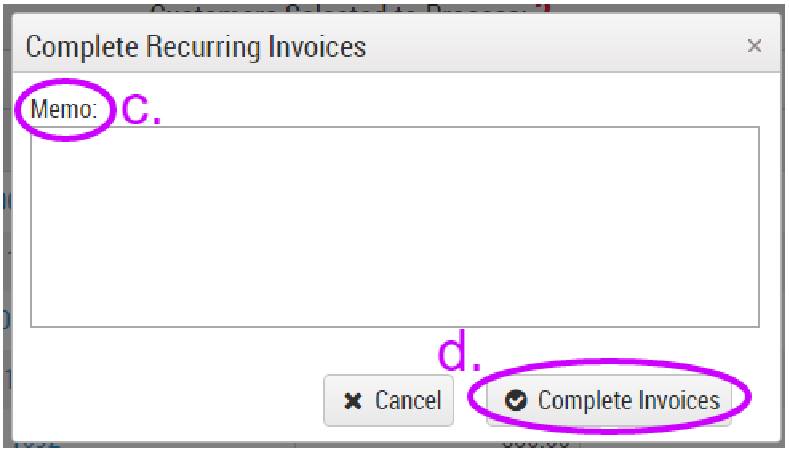


a. Select Customers

Select the customer(s) you would like to process invoice(s) for by checking the box(es) to the left of his/her name. If you would like to process invoices for all of these customers check the "Select All" box.

b. Process Invoices

click "Process Invoices" in the upper right corner of the page. A "Complete Recurring Invoices" box will appear.



c. Memo

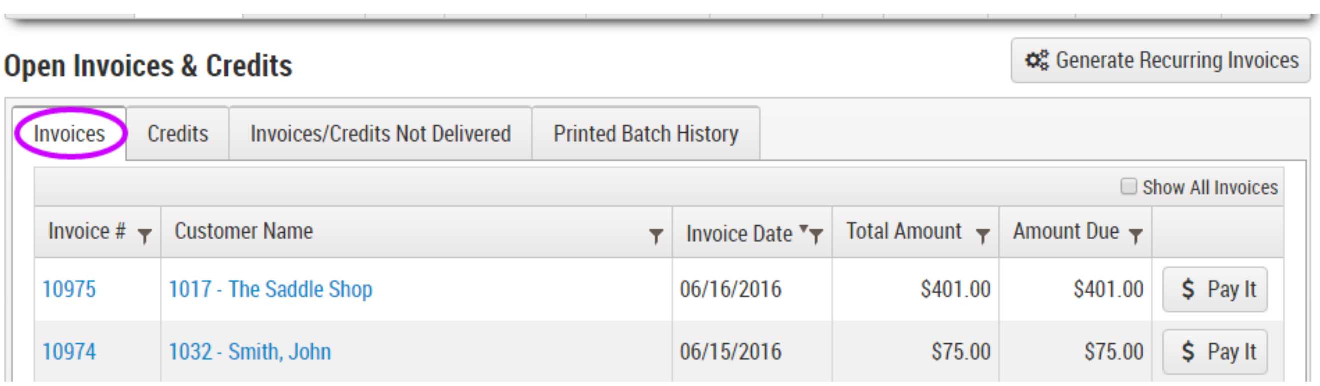
Type a memo if you would like to appear on the invoice(s). If you have already entered a memo for a customer individually through the customer RMR page, this memo will also appear on the invoice.

d. Complete Invoices

Click "Complete Invoices" in the bottom right corner of the page. This will take you back to the Invoices Page. The invoices you processed will be listed as open invoices in the "Invoice" and will also appear in the "Invoices/Credits Not Delivered" Tab.

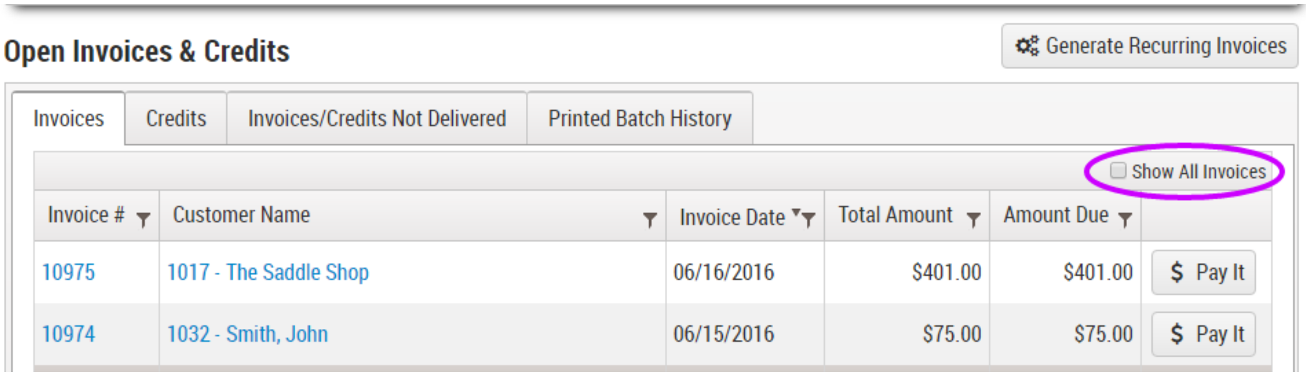
Invoices Tab

Click this tab to access a list of open invoices at the dealer level:



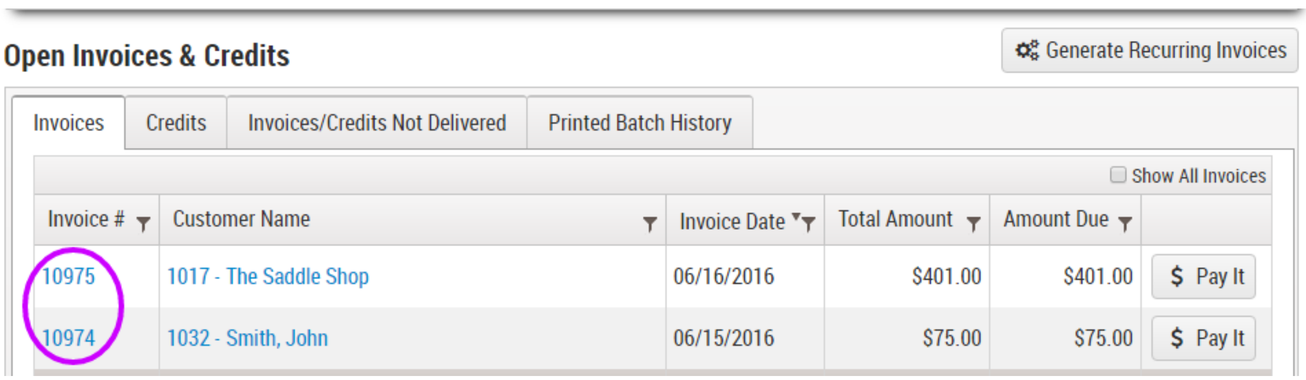
Show All Invoices

To show ALL invoices, including those with a zero balance, check the “Show All Invoices” box in the upper right corner of the page.



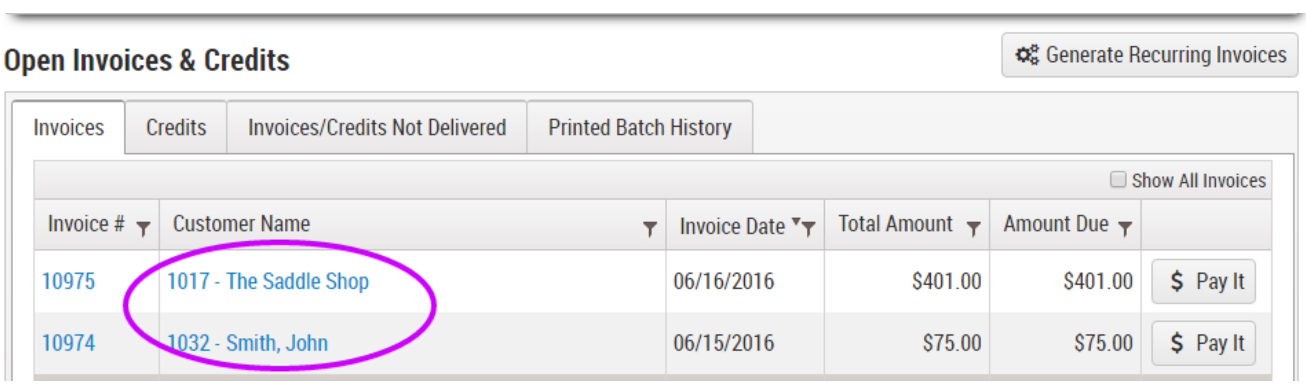
Customer Invoice Page

Click the blue "#" hyperlink on the left side of the page to view the customer invoice page. This page will give you detailed information about the invoice.



Customer Manager Page

Click the blue "Customer Name" hyperlink to access the Customer Manager Page linked to this invoice:



Pay It

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*Note: This is only for credit card and eCheck transactions.
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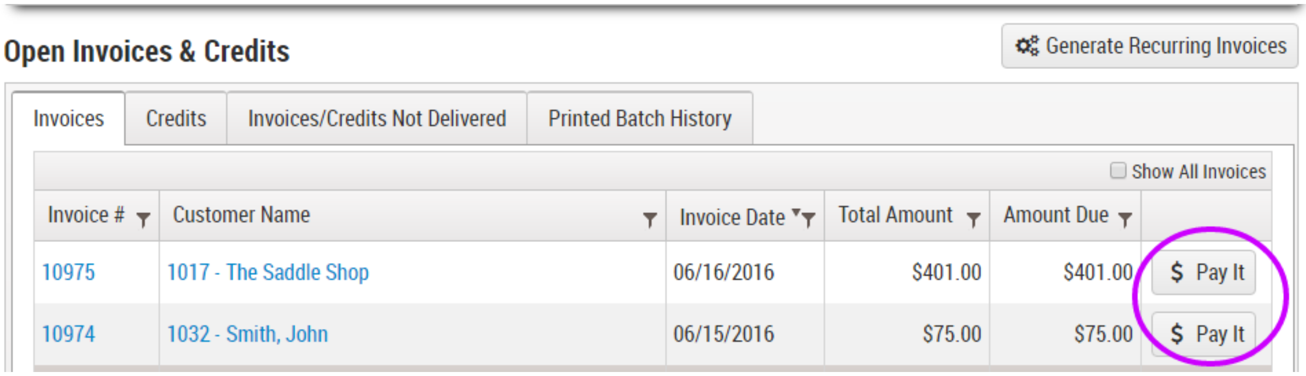
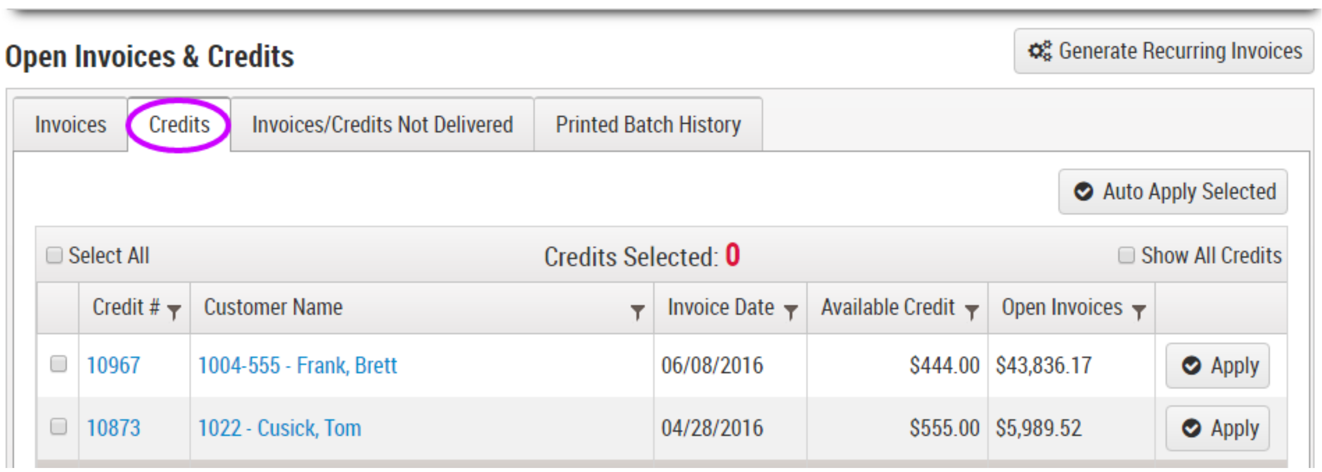
To pay an open invoice, click “Pay It” to the right of the invoice you want to pay. This will bring you to the payment page.



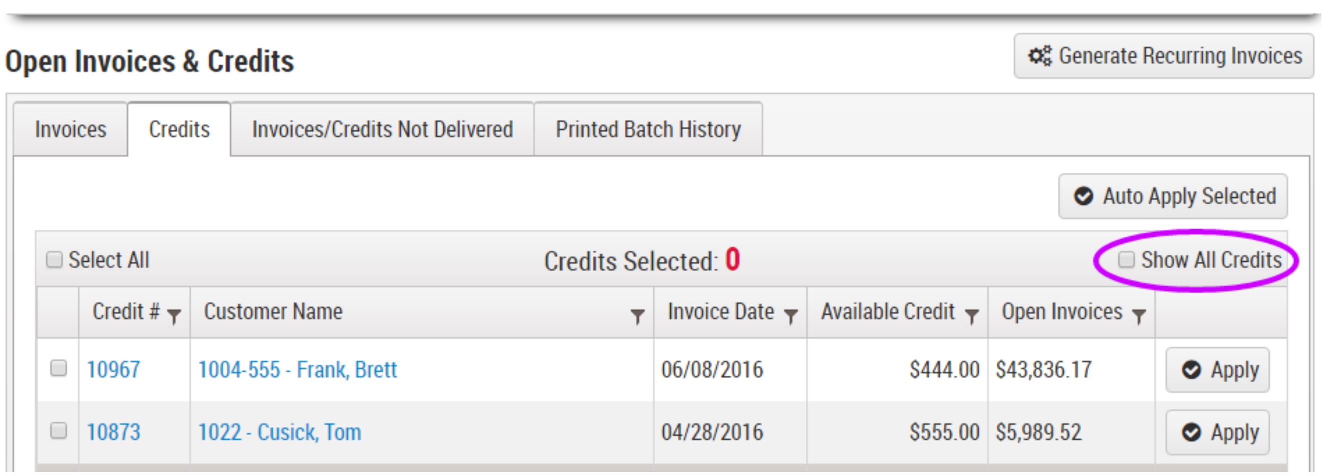
Credits Tab

Click this tab to access a list of all open credits at a dealer level.



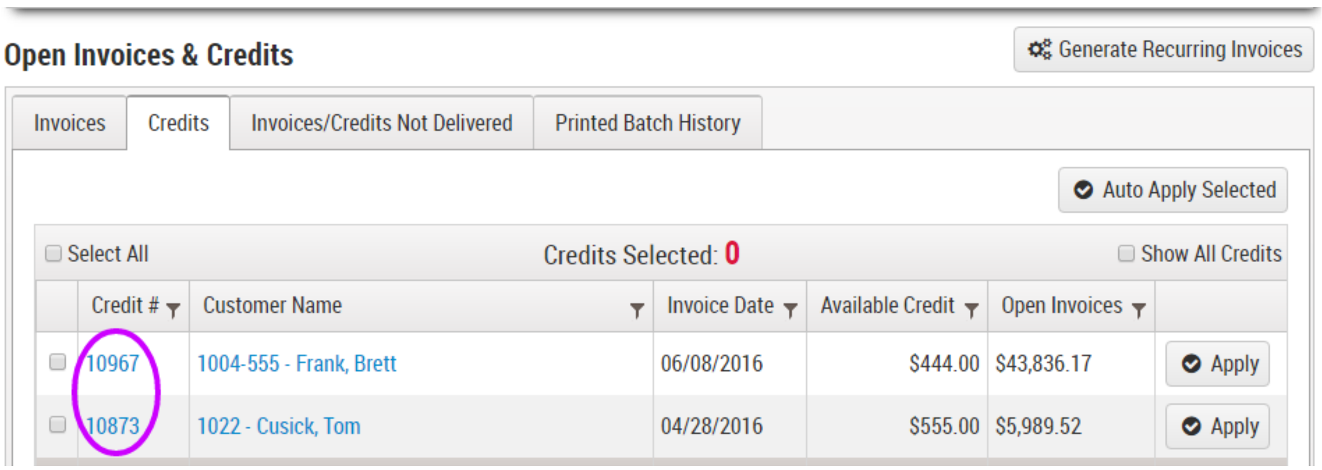
Show All Credits

To show all credits, including those that have already been applied, check the "Show All Credits" box in the upper right corner of the page.



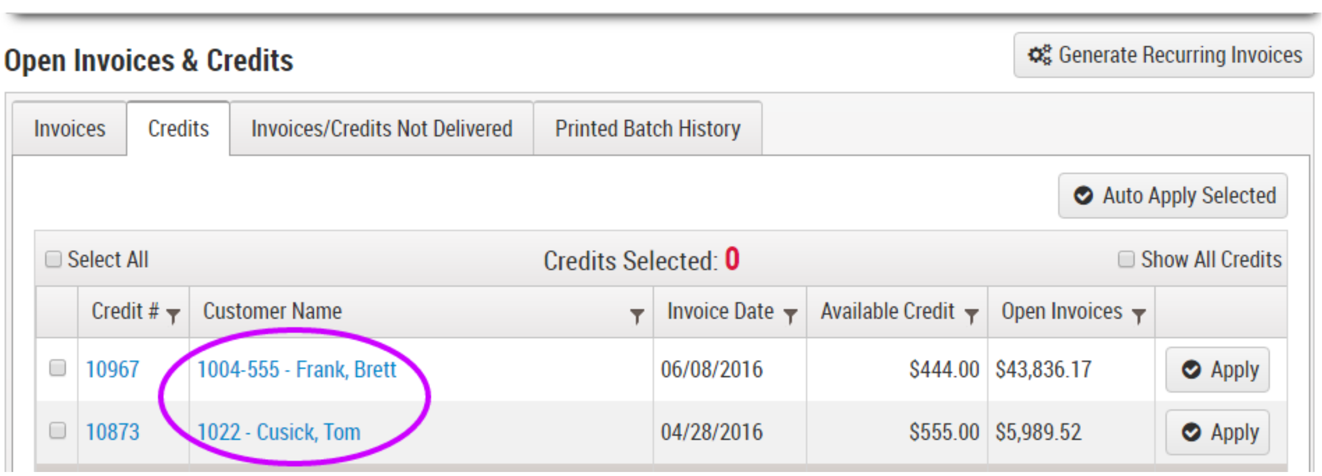
Customer Credit Page

Click the blue "Credit #" hyperlink on the left side of the page to access the Customer Credit Page. This will give you detailed information about the credit.



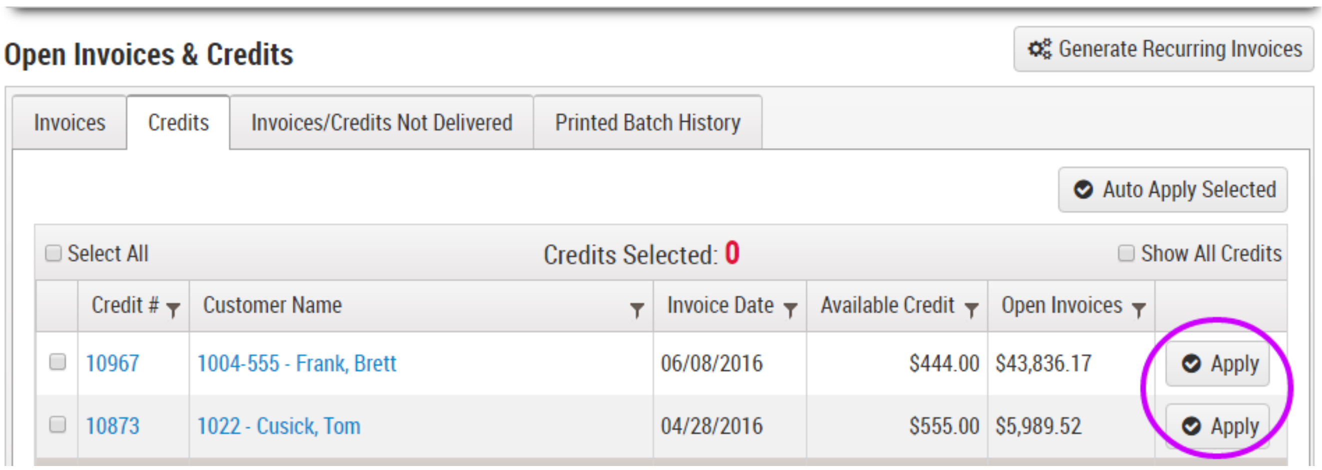
Customer Manager Page

Click the blue "Customer Name" hyperlink to access the Customer Manager page linked to this credit. This will give you detailed information about the customer.

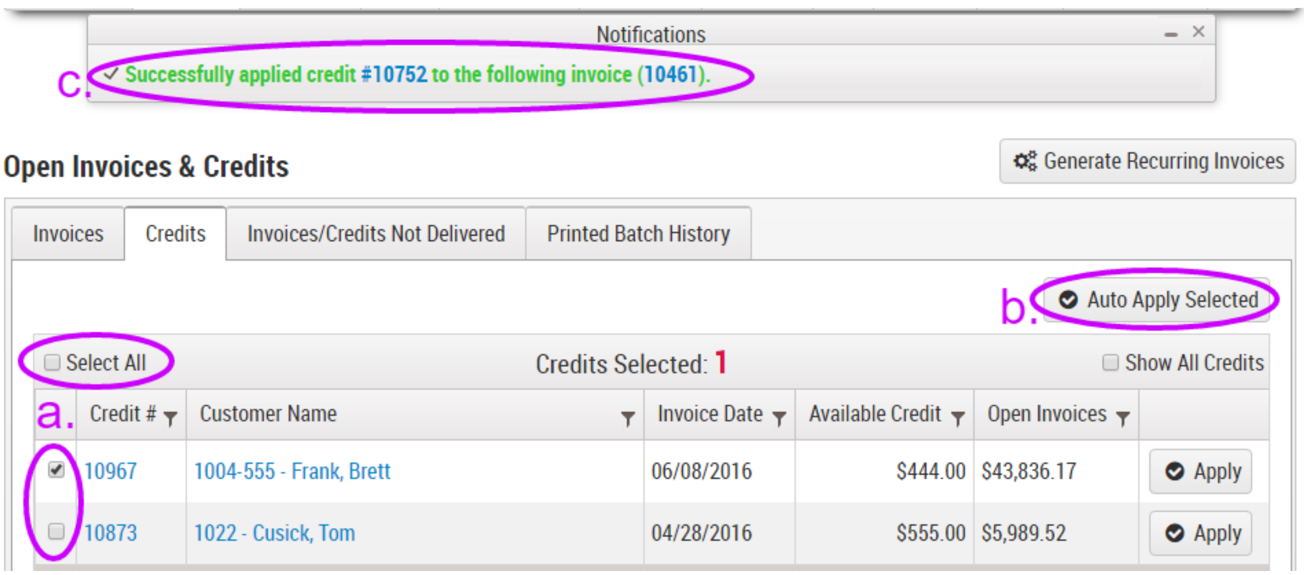


Apply

To apply an open credit to an invoice click "Apply" to the right of the credit you wish to apply.



Auto Apply Credits



a. Select Credits

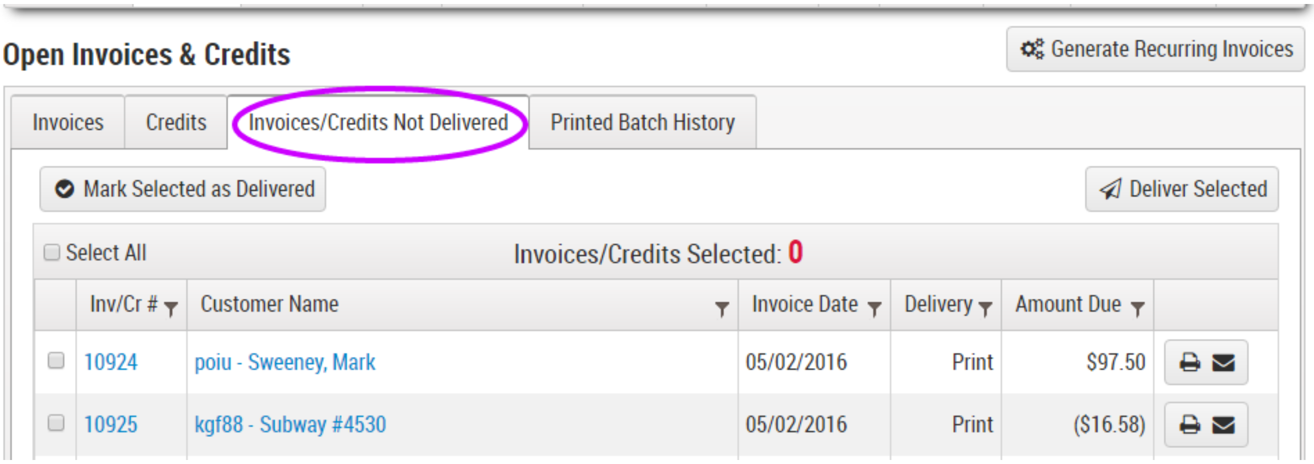
Select the credit(s) you wish to auto apply by checking the boxes to the left of the credit(s). If you wish to auto apply all your open credits check the "Select All" box.

b. Auto Apply

Click Auto Apply Selected in the upper right corner of the page. Credits will be automatically applied to the customer's oldest open invoices, if no invoices remain the credit will be applied to unpaid customer late fees.

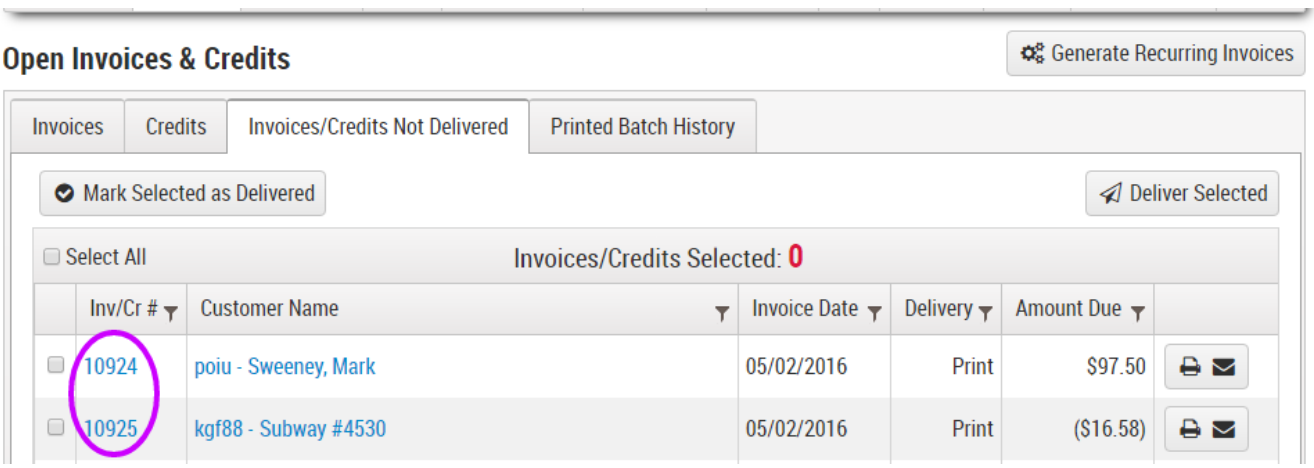
Dealer-Level Invoices/Credits Not Delivered

Click this tab to access a list of open credits and invoices that have not been delivered to customers.



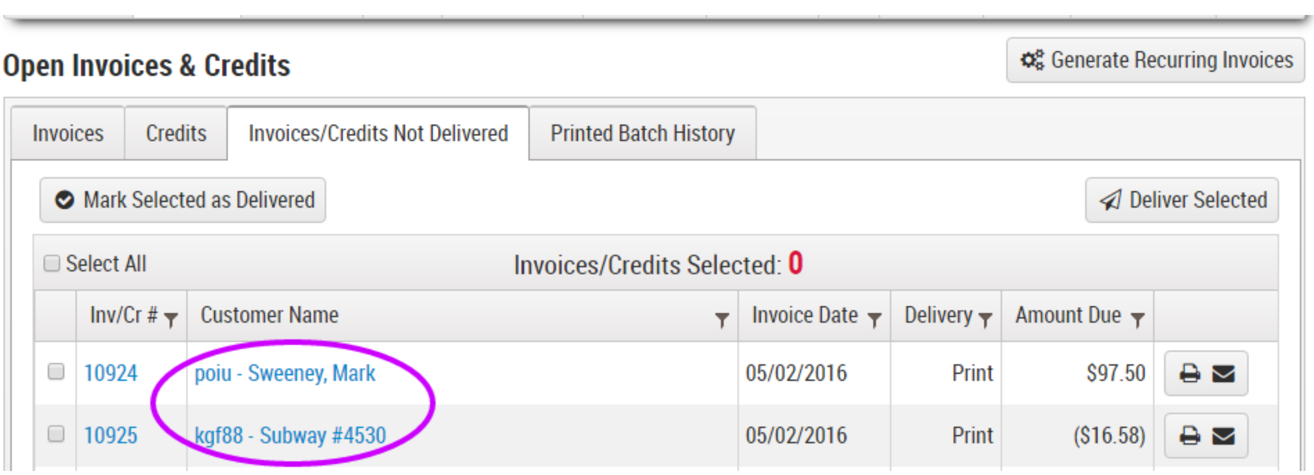
*Note: Invoices have a positive amount due value and credits have an negative amount due (shown in brackets).

Customer Credit/Invoice Page



To view the customer credit page or customer invoice page for an undelivered open credit or invoice, click the blue "Inv/Cr #" hyperlink on the left side of the page.

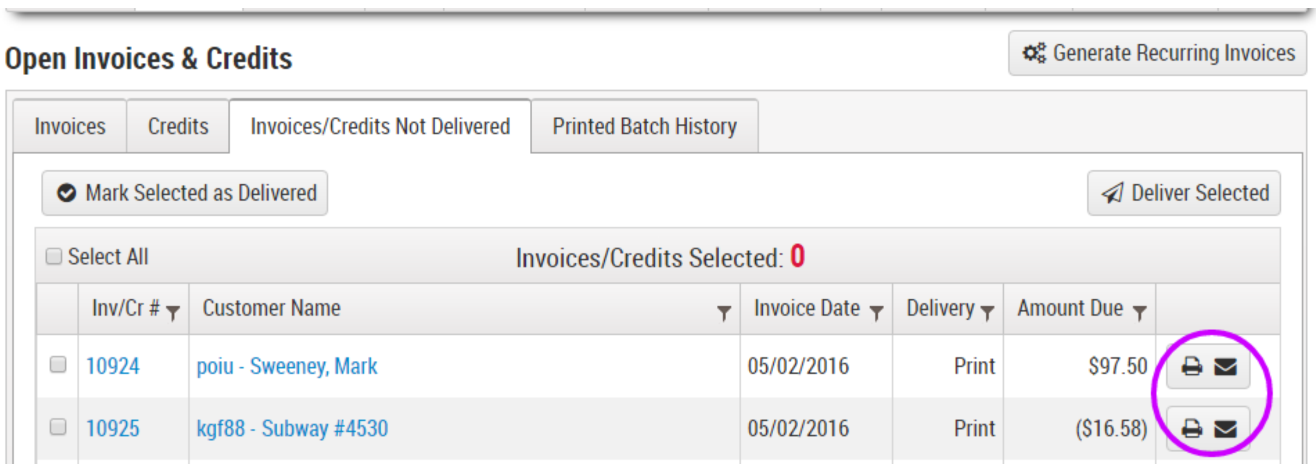
Customer Manager Page



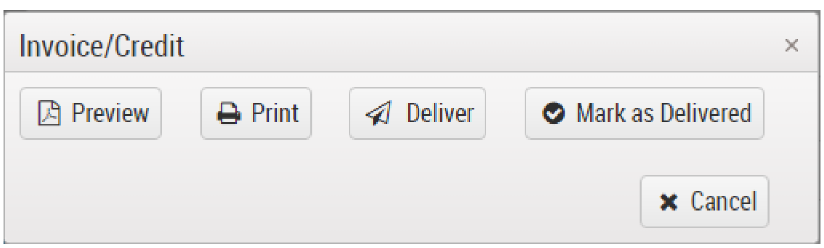
Click the blue "Customer Name" hyperlink to access the Customer Manager page linked to the credit or invoice. This will give you detailed information about the customer.

Print/Deliver

To Print and/or Deliver a credit or invoice, click the print/deliver icon to the right of the credit or invoice:



An Invoice/Credit delivery options box will appear:



Preview

Click "Preview" to download a pdf of the credit or invoice to your documents. This will not mark the credit or invoice as delivered.

Print

Click "Print" to download a pdf of the invoice or credit to your documents. This will mark the credit or invoice as delivered.

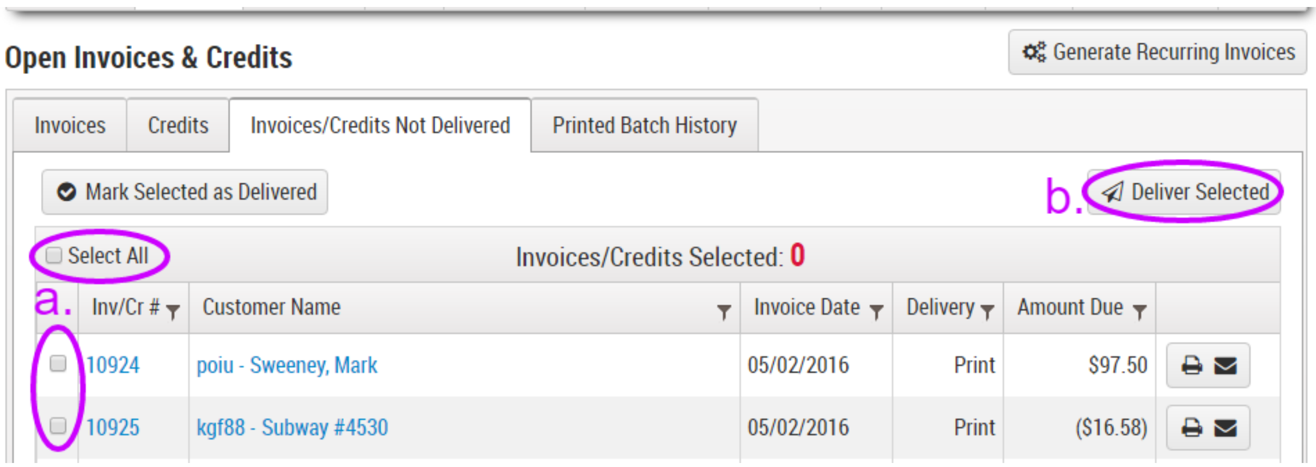
Deliver

Click "Deliver" to deliver the invoice Via Mail or Email. A box will appear where you can choose between the two delivery methods.

Mark as Delivered

Click "Mark as Delivered" to mark the credit or invoice as delivered. This will not deliver the credit or invoice.

Deliver Selected Invoices/Credits



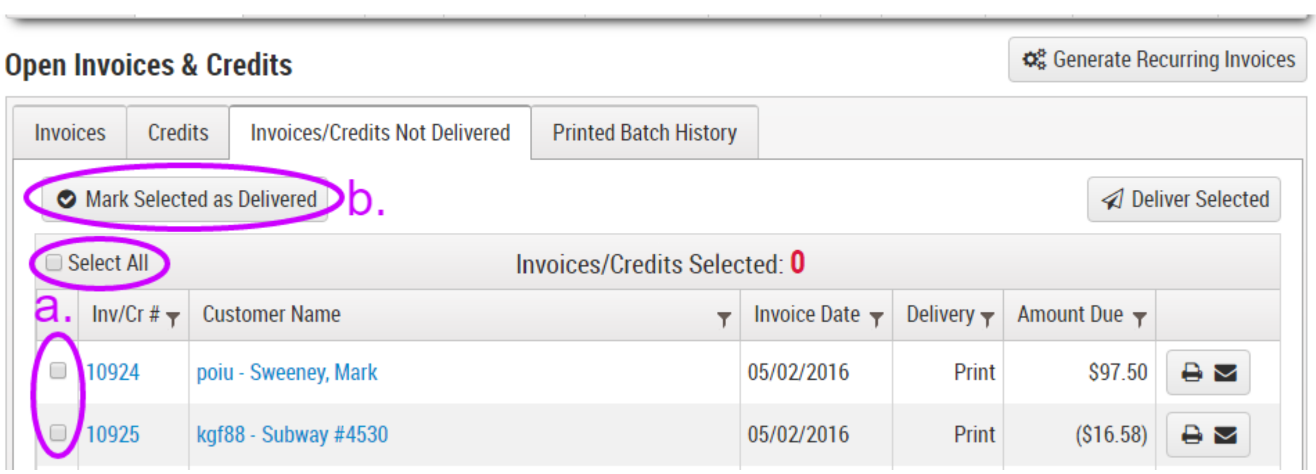
a. Select Invoice/Credits

select the credit(s) or invoice(s) you wish to deliver by checking the corresponding box(es) on the left side of the screen. If you wish to deliver all of invoices or credits, check the "Select All" box.

b. Deliver Selected

Click "Deliver Selected" in the upper right corner of the page. This will deliver the credit(s) and/or Invoice(s) by the delivery method shown in the "Delivery" header.

Mark Selected as Delivered



a. Select Invoices/Credits

Select the credit(s) or invoice(s) you wish to mark as delivered by checking the corresponding box(es) on the left side of the screen. If you wish to mark all of your credits and invoices as delivered, check the "Select All" box.

b. Mark Selected as Delivered

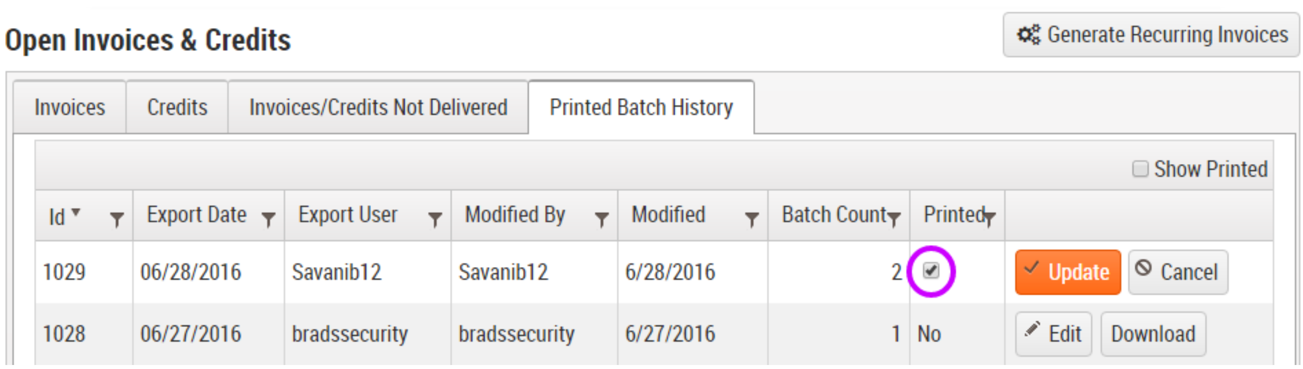
Then click "Mark Selected as Delivered" in the upper left corner of the page. This will mark the selected invoice(s) and credit(s) as delivered. This will not deliver credits or invoices.

Printed Batch History Tab

If you deliver Invoices using printing as the delivery method, those invoices will appear in batches in this tab.

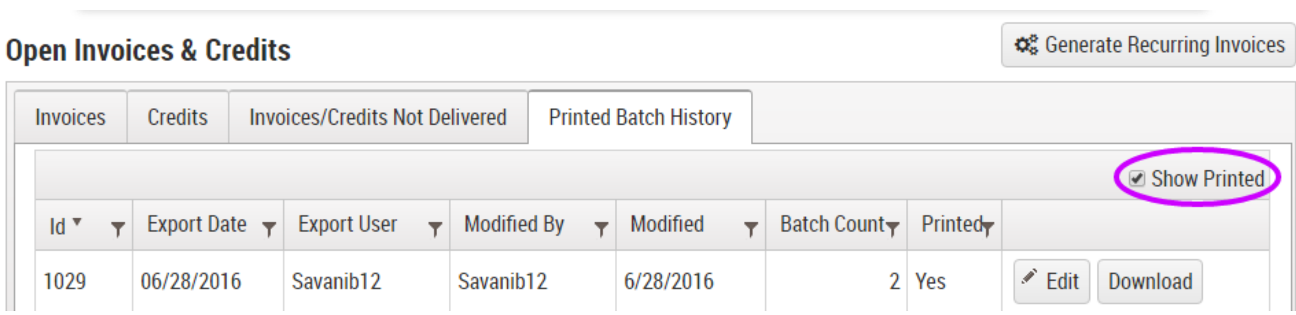
Edit

To confirm that you have printed and delivered these invoices click the edit button and check the box under the "Printed" heading. Then click "Update" on the right side of the screen to save.



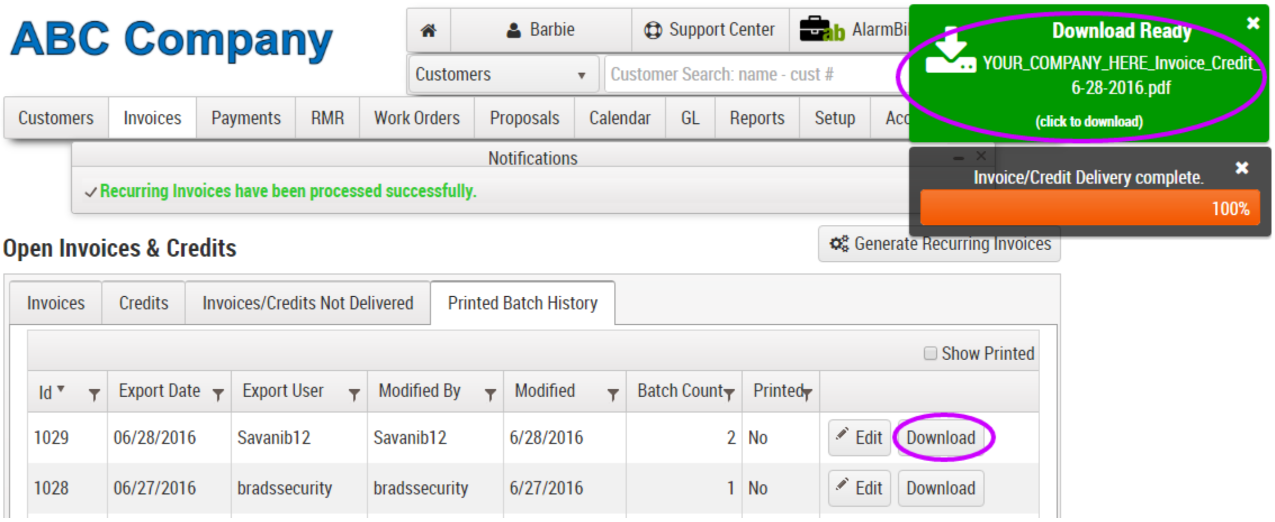
Show Printed

To view batches that have been marked as printed check the "Show Printed" box in the upper right corner of the page.



Download

Click "Download" to download a PDF of the invoices in the batch to your documents to view and/or print. When the download is completed click the green "Download Ready" box in the upper right corner.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Barbie
Support Center
AlarmBi
Customers
Customer Search: name - cust #
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Payments
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Work Orders
Proposals
Calendar
GL
Reports
Setup
Notifications
Recurring Invoices have been processed successfully.
Invoice/Credit Delivery complete.
100%
Open Invoices & Credits
Generate Recurring Invoices
Invoices
Credits
Invoices/Credits Not Delivered
Printed Batch History
Show Printed
Id
Export Date
Export User
Modified By
Modified
Batch Count
Printed
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Savanib12
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