

[VIDEO] Customize the Invoices Page

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CDT

You can customize the Invoices page so you only see the information that is most important to your business. Watch the video below for more information, or read the article that follows.


Customizing the Invoices Page

To access the Invoices page:

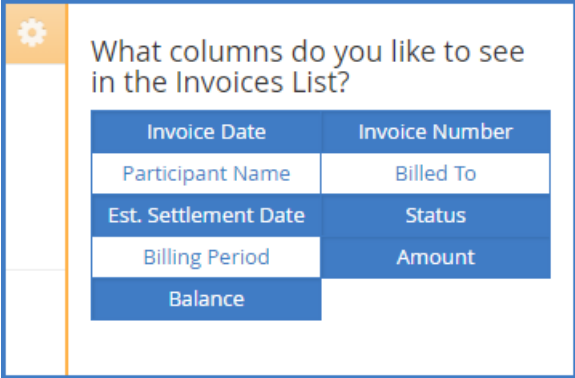
1. From the menu to the left, click **Accounting**.
2. Click **Invoices**.
3. Enter your accounting PIN and click **Go**.

Note: If you do not have an account PIN set, you are prompted to set one.

Show/Hide Invoice Headers

1. Click  in the top-right corner.
2. Select the columns you want to see on the Invoices page. Columns highlighted in blue are currently shown.

The invoices list updates as you add and remove columns.



What columns do you like to see in the Invoices List?

<input checked="" type="checkbox"/> Invoice Date	<input checked="" type="checkbox"/> Invoice Number
<input checked="" type="checkbox"/> Participant Name	<input checked="" type="checkbox"/> Billed To
<input checked="" type="checkbox"/> Est. Settlement Date	<input checked="" type="checkbox"/> Status
<input checked="" type="checkbox"/> Billing Period	<input checked="" type="checkbox"/> Amount
<input type="checkbox"/> Balance	

Sort Invoices by Header

You can sort information by each column header. Click a column header to sort information in ascending or descending order by that column. When you sort by a column, the column header is highlighted in blue, and the arrow to the right of the name indicates whether the sort is in ascending or descending order.

Date range		From	To	
All time			03/24/2021	GO

<input type="checkbox"/>	Invoice Date	Invoice Number	Participant Name	Billed To	Est. Settlement Date	Status	Billing Period	Amount	Balance
<input type="checkbox"/>	11/28/2018	31559177	Murdock, Matthew	Montoya, Maria		Unpaid	11/01/18 - 11/15/18	\$133.75	\$133.75
<input type="checkbox"/>	11/29/2018	31561909	Marks, Hallie	Montoya, Maria	01/29/2019 (Cash)	Paid	11/01/18 - 11/15/18	\$175.00	\$0.00
<input type="checkbox"/>	11/29/2018	31561926	Marks, Hallie, Montoya, Mike	Montoya, Maria		Unpaid	11/12/18 - 11/16/18	\$298.75	\$298.75
<input type="checkbox"/>	01/09/2019	31708784	Marks, Hallie	Montoya, Maria	01/12/2021 (Check)	Paid	11/12/18 - 11/16/18	\$130.00	\$0.00
<input type="checkbox"/>	01/29/2019	31798633	Montoya, Mike, Marks, Hallie	Montoya, Maria		Draft	11/12/18 - 11/16/18	\$492.50	\$492.50
<input type="checkbox"/>	11/12/2019	32630289	Marks, Hallie	Montoya, Maria		Draft	07/16/19 - 07/23/19	\$100.00	\$100.00
<input type="checkbox"/>	01/11/2021	34564882	Marks, Hallie	Montoya, Maria	01/11/2021 (Cash)	Paid	12/30/19 - 01/04/20	\$395.00	\$0.00
<input type="checkbox"/>	03/24/2021	34780050	Murdock, Matthew	Montoya, Maria	03/24/2021 (Credit Balance)	Paid	12/30/19 - 01/04/20	\$310.00	\$0.00

Total: \$2,035.00 Total: \$1,025.00
Grand Total: \$2,035.00 Grand Total: \$1,025.00

Showing 1 to 8 of 8 entries.

Previous 1 Next

Filter by Invoice Status

1. Click the **Status (All Invoices)** drop-down menu and select the invoice statuses to view. You can select multiple statuses, if needed. The invoices list updates automatically

Invoices		Unpaid, Paid, Deleted		All Parents	Edit Email	Add Invoice
<input type="checkbox"/> Draft <input type="checkbox"/> Partially Paid <input checked="" type="checkbox"/> Unpaid <input checked="" type="checkbox"/> Paid <input type="checkbox"/> Declined <input type="checkbox"/> Deleted <input type="checkbox"/> Closed		From To 03/24/2021 GO				

<input type="checkbox"/>	Invoice Date	Invoice Number	Participant Name	Billed To	Est. Settlement Date	Status	Billing Period	Amount	Balance
<input type="checkbox"/>	11/28/2018	31559177	Murdock, Matthew	Montoya, Maria		Unpaid	11/01/18 - 11/15/18	\$133.75	\$133.75
<input type="checkbox"/>	11/29/2018	31561909	Marks, Hallie	Montoya, Maria	01/29/2019 (Cash)	Paid	11/01/18 - 11/15/18	\$175.00	\$0.00
<input type="checkbox"/>	11/29/2018	31561926	Marks, Hallie, Montoya, Mike	Montoya, Maria		Unpaid	11/12/18 - 11/16/18	\$298.75	\$298.75
<input type="checkbox"/>	01/09/2019	31708784	Marks, Hallie	Montoya, Maria	01/12/2021 (Check)	Paid	11/12/18 - 11/16/18	\$130.00	\$0.00

2. To view all invoices again, click the **Status** drop-down menu and click the selected statuses to clear it.

Filter by Parent Account

1. Click the **Parents (All Parents)** drop-down menu and select the parent to view. The invoices list updates automatically.

Invoices		Unpaid, Paid, Deleted		All Parents	Edit Email	Add Invoice
<input type="checkbox"/> Draft <input type="checkbox"/> Partially Paid <input checked="" type="checkbox"/> Unpaid <input checked="" type="checkbox"/> Paid <input type="checkbox"/> Declined <input type="checkbox"/> Deleted <input type="checkbox"/> Closed		Date range All time		To 03/24/2021 GO		

<input type="checkbox"/>	Invoice Date	Invoice Number	Participant Name	Billed To	Est. Settlement Date	Status	Billing Period	Amount	Balance
<input type="checkbox"/>	11/28/2018	31559177	Murdock, Matthew	Montoya, Maria		Unpaid	11/01/18 - 11/15/18	\$133.75	\$133.75
<input type="checkbox"/>	11/29/2018	31561909	Marks, Hallie	Montoya, Maria	01/29/2019 (Cash)	Paid	11/01/18 - 11/15/18	\$175.00	\$0.00

2. To view all parents again, click the **Parents** drop-down menu and select All Parents.

Note: You can sort by child on the **Recurring Invoices** tab.

Filter by Date Range

1. Click the **Date Range** drop-down menu and select the date range to view.

Date range

All time
Today
Current Month
Current Quarter
Current Year
Current Fiscal Year
Previous Month
Previous Quarter
Previous Year
Previous Fiscal Year
Custom Date
All time

From
To
05/20/2021
GO

Invoice Number	Participant Name	Billed To	Est. Settlement Date	Status	Billing Period	Amount	Balance
559177	Murdock, Matthew	Montoya, Maria		Unpaid	11/01/18 - 11/15/18	\$133.75	\$133.75
561909	Marks, Hallie	Montoya, Maria	01/29/2019 (Cash)	Paid	11/01/18 - 11/15/18	\$175.00	\$0.00
561926	Montoya, Mike, Marks, Hallie	Montoya, Maria		Unpaid	11/12/18 - 11/16/18	\$298.75	\$298.75
708784	Marks, Hallie	Montoya, Maria	01/12/2021 (Check)	Paid	11/12/18 - 11/16/18	\$130.00	\$0.00
798051	Dickens, Charles	Dickens, John	03/24/2021 (Cash)	Paid	11/12/18 - 11/16/18	\$260.00	\$0.00
31799999	Dickens, Charles	Dickens, John	01/31/2019 (Check #456)	Paid	01/29/19 - 02/05/19	\$125.00	\$0.00

You can choose from the following:

- Current Month
- Current Quarter
- Current Year
- Current Fiscal Year
- Previous Month
- Previous Quarter
- Previous Year
- Previous Fiscal Year
- All Time
- Custom Date

2. If you select **Custom Date** in **Step 1**, click the **From** and **To** boxes and set a custom date range to view.

3. When finished, click **Go**.