
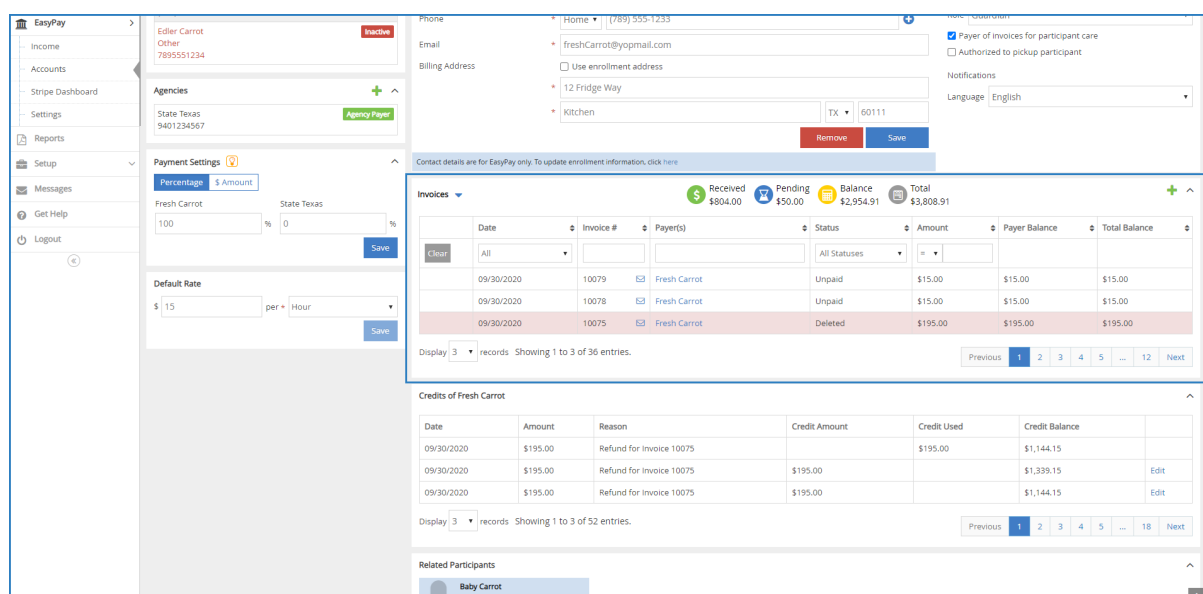


Manage Invoices on the Participant Account

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CST

The Participant Account Details page lists all invoices associated with the selected participant, so you can see which invoices are outstanding, paid, and so on. A total account balance also displays above the invoice table, giving you a snapshot of the participant's account status. This includes the total received, and pending amounts, as well as the account balance and account totals.

1. From the menu to the left, click **Accounting**.
2. Click **Accounts**. The Participant Account Details page opens and displays information for the last participant you viewed.
3. Click the drop-down menu at the top of the page and select the participant for whom to view invoices.
4. Scroll to the **Invoices** section. If this section does not display, click  to expand it.



Participant Information:

- Name: Edler Carrot (Inactive)
- Other: 7895551234
- Phone: Home (789) 555-1233
- Email: freshCarrot@yopmail.com
- Billing Address: 12 Fridge Way, Kitchen, TX 60111

Payment Settings:

- Percentage: 100%
- \$ Amount: 0
- State: Texas
- Default Rate: \$ 15 per Hour

Invoices Table:


Date	Invoice #	Payer(s)	Status	Amount	Payer Balance	Total Balance
09/30/2020	10079	Fresh Carrot	Unpaid	\$15.00	\$15.00	\$15.00
09/30/2020	10078	Fresh Carrot	Unpaid	\$15.00	\$15.00	\$15.00
09/30/2020	10075	Fresh Carrot	Deleted	\$195.00	\$195.00	\$195.00

Credits of Fresh Carrot Table:

Date	Amount	Reason	Credit Amount	Credit Used	Credit Balance
09/30/2020	\$195.00	Refund for Invoice 10075	\$195.00	\$195.00	\$1,144.15
09/30/2020	\$195.00	Refund for Invoice 10075	\$195.00		\$1,339.15
09/30/2020	\$195.00	Refund for Invoice 10075	\$195.00		\$1,144.15

The following columns display:


- Date
- Invoice #
- Payer(s)
- Status
- Amount
- Payer Balance
- Total Balance

5. Click  and select **Recurring Invoices** to view any recurring invoices associated with this participant account.

The screenshot shows the EasyPay interface for managing recurring invoices. The left sidebar contains navigation links: Income, Accounts, Stripe Dashboard, Settings, Reports, Setup, Messages, Get Help, and Logout. The main content area is divided into several sections:

- Contact Information:** Phone (Home: (789) 555-1233), Email (freshCarrot@yopmail.com), and Billing Address (12 Fridge Way, Kitchen, TX 60111).
- Payment Settings:** Includes tabs for Percentage and \$ Amount, and a Default Rate section.
- Recurring Invoices:** A table with columns: Payer(s), Frequency, Amount, Next Invoice Date, and Status. It lists three invoices for Fresh Carrot.
- Credits of Fresh Carrot:** A table with columns: Date, Amount, Reason, Credit Amount, Credit Used, and Credit Balance. It shows three refund entries.
- Related Participants:** A section showing Baby Carrot as a related participant.

The following information displays for recurring invoices:

- Payer(s)
 - Frequency
 - Amount
 - Next Invoice Date
 - Status
6. You can filter invoices and recurring invoices by each column. Simply use the drop-down menus to filter, or type in the text boxes.
 7. Click each column header to sort in ascending or descending order.
 8. Click **Previous** and **Next** to navigate between pages of invoices.
 9. Click the **Display** drop-down menu to change the number of invoices that display by default. You can select **3, 10, 20, 50, or 100**.
 10. Click  to add an invoice from this page. For more information, see [Create Invoices](#).