[VIDEO] Customize the Invoices Page

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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

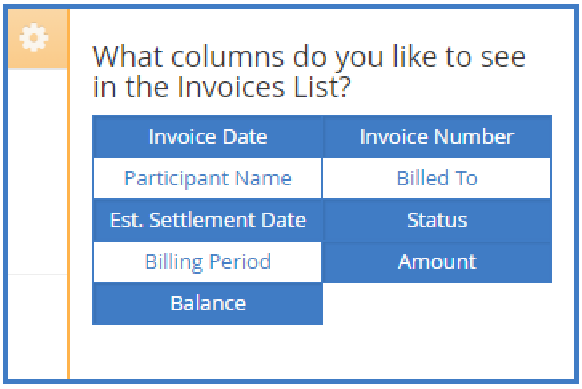
To access the Invoices page:

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.

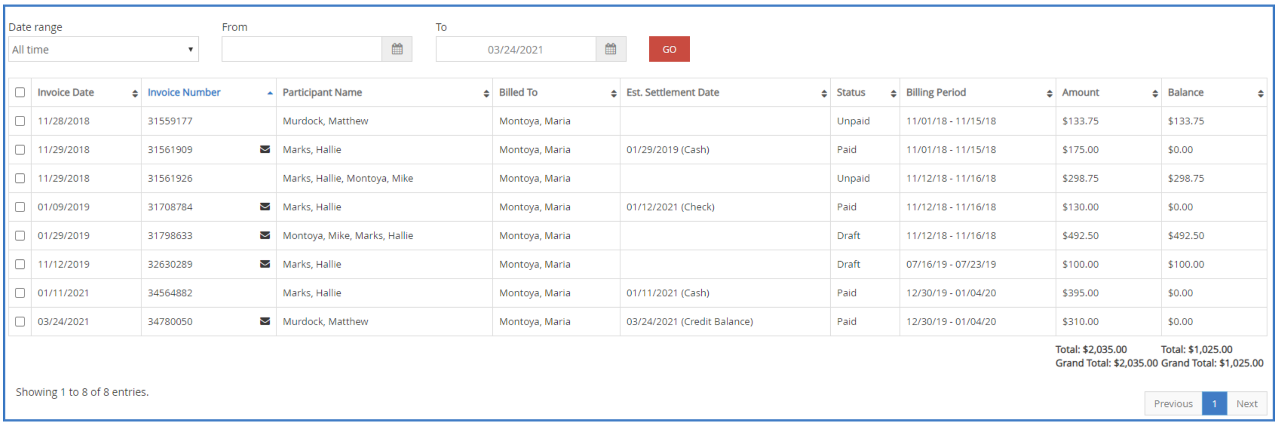
Show/Hide Invoice Headers

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.



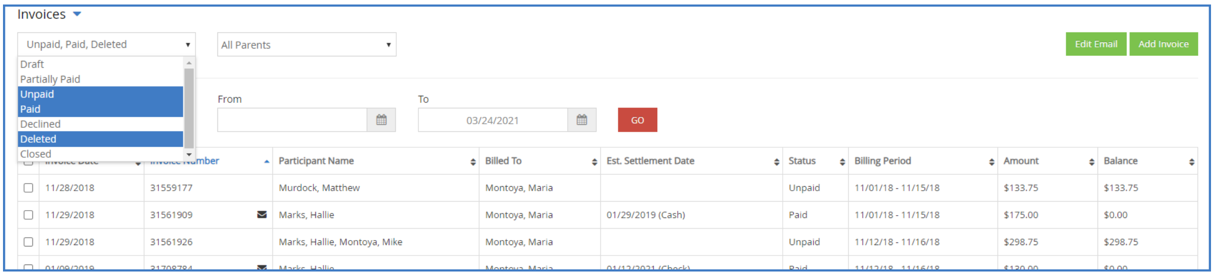
Sort Invoices by Header

You can sort information by each column header. Click a column header to sort information i 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.



Filter by Invoice Status

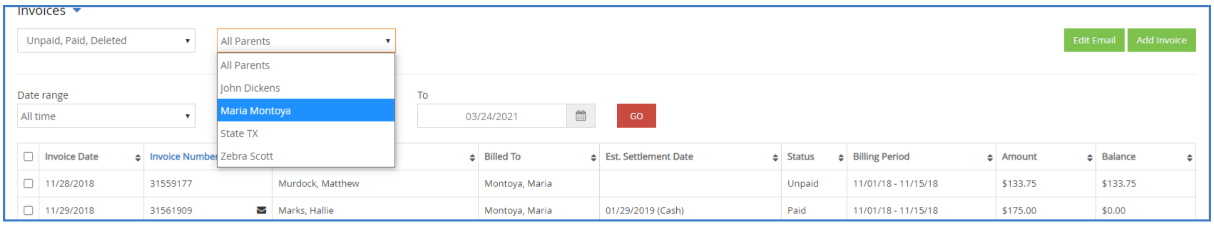
1. Click the **Status (All Invoices)** drop-down menu and select the invoice statuses to view. You can select multiple statuses, if needed. The invoices list updates automatically



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.

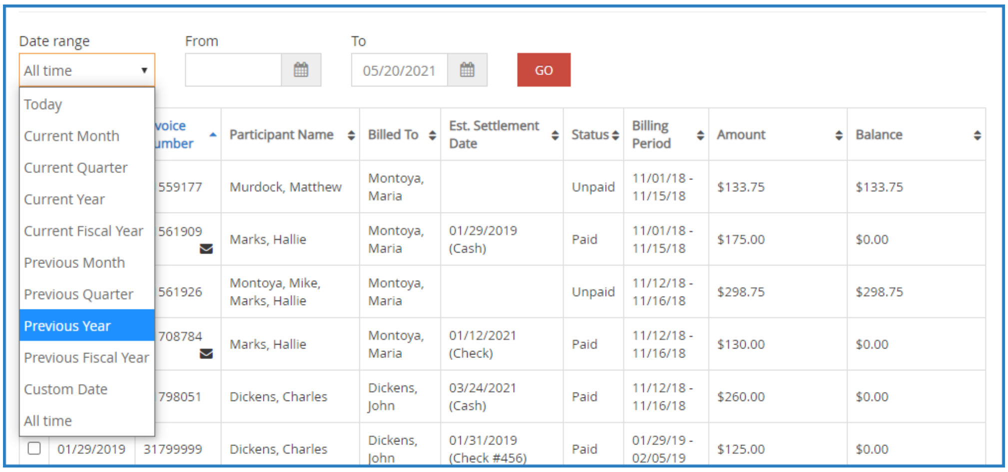


2. To view all parents again, click the **Parents** drop-down menu and select All Parents.

> **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.



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**.