View Invoices

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Invoices are stored on the Invoices page. You can also view your recurring invoices and access invoice details.

In this article:

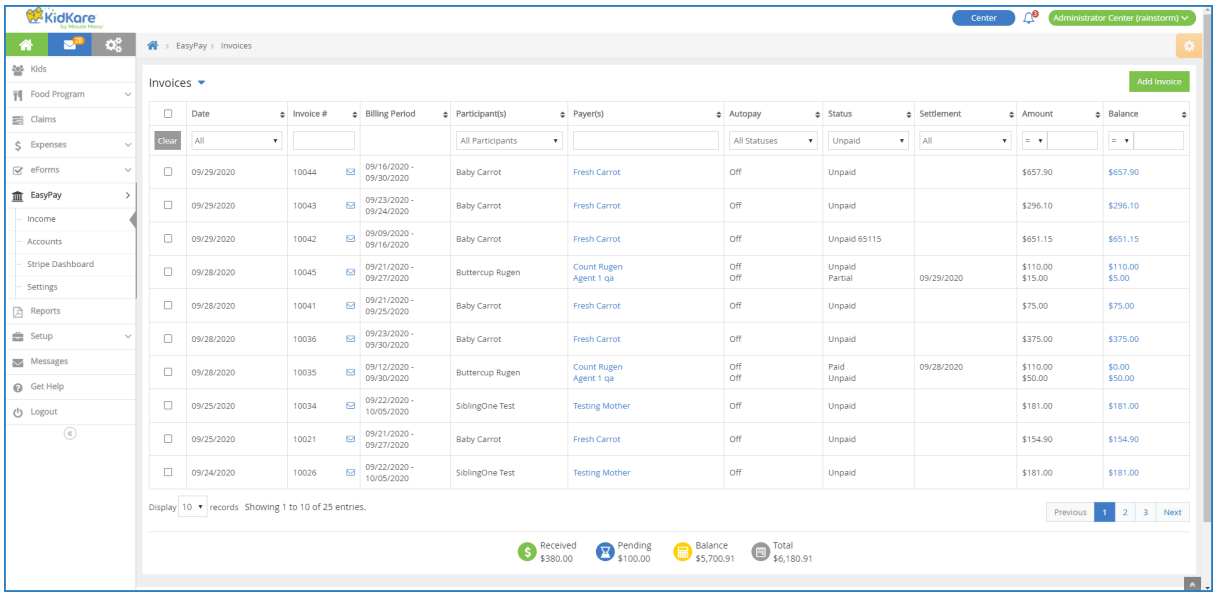
- View the Invoice List
- View the Recurring Invoices List
- View Invoice Details
- Viewing Payment Status At-A-Glance

View the Invoice List

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

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

4. The Invoices page opens.



The following information displays for each invoice:

- **Date:** This is the date the invoice was created.
- **Invoice #:** This is the invoice number.
- **Billing Period:** This is the period for which the invoice was issued.
- **Participant(s):** These are the participants included on the invoice.
- **Payer(s):** These are the payers associated with the invoice.
- **Autopay:** This column indicates whether the payer associated with the listed invoice is using Autopay.

- **Status:** This is the invoice's current status. See **Understand Invoice Status** for more information.
- **Settlement:** This is the date the invoice was paid or deleted.
- **Amount:** This is the total amount billed.
- **Balance:** This is the remaining amount owed.

5. Use the boxes and menus at the top of the table to filter the invoices that display. You can filter by every column *except* Billing Period.
6. Click each column header to sort invoices in ascending or descending order.
7. Click an invoice to view invoice details. See the **View Invoice Details** heading, below.

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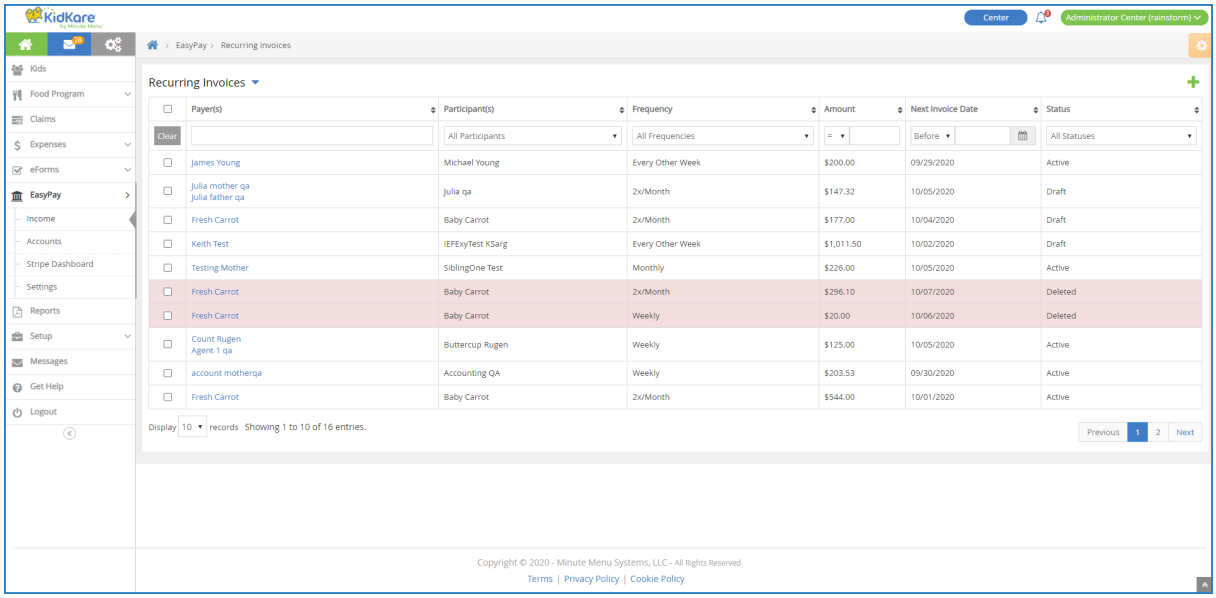
View the Recurring Invoices List

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

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

4. Click and select **Recurring Invoices**.



The following information displays for each invoice:

- **Payer(s):** These are the payers associated with the invoice.
- **Participant(s):** These are the participants included on the invoice.
- **Frequency:** This is the frequency with which the invoice is generated. For example, this column would show Weekly for invoices that run each week.
- **Amount:** This is the total amount billed.
- **Next Invoice Date:** This is the next date on which this invoice will run.
- **Status:** This is the status of the recurring invoice. This can be Draft, Active, or Deleted.

5. Use the boxes and menus at the top of the table to filter the invoices that display.
6. Click each column header to sort invoices in ascending or descending order.
7. Click an invoice to view invoice details. See the **View Invoice Details** heading, below.

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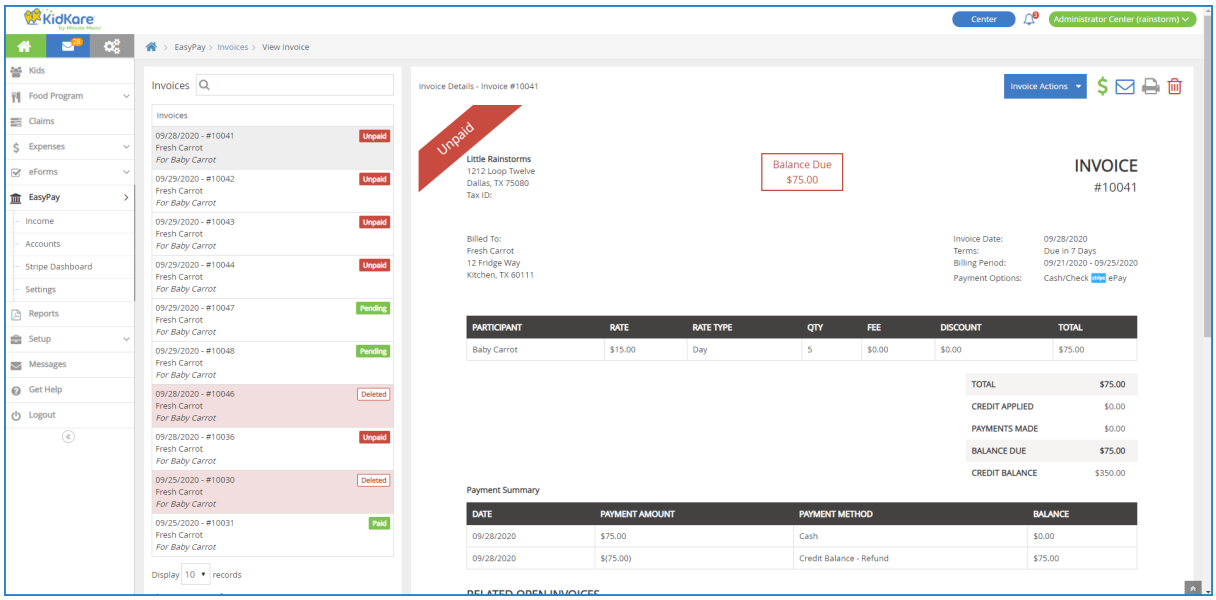
View Invoice Details

1. From the menu to the left, click **Accounting**.
2. Click **Income**. The Invoices page opens.
3. Click the invoice to view.



The View Invoice page opens and displays the following:

- **Invoices:** A list of other invoices associated with this participant displays to the left. Each one includes status markers that tell you, at-a-glance, whether the invoice is unpaid, paid, partially paid, and so on. You can click each invoice in this list to view the invoice details.
- **Invoice:** The invoice as the payer receives it displays to the right. It includes all line items you set up, payments made, credits applied, and so on.
- **Invoice Activity:** This section lists all actions taken on this invoice to date. You can filter this section to Payment Activity, Comments, and/or System Activity.

Note: You can also access invoice details from the Invoices section on the Participant Account Details page. To do so, click the invoice to view. The Invoice Details page opens.

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Viewing Payment Status At-A-Glance

Payment status for all current invoices displays at the bottom of the Invoices list. These numbers are automatically updated as you apply filters, so you always seen payment status for the particular time period, invoices, and participants you are viewing.

Status	**Definition**
Received	This is the sum of all invoice payments for invoices where the invoice status is Paid, Partially Paid, or Declined.
Pending	This is the sum of all invoice payments for invoices where the invoice status is Paid or Partially Paid and the settlement is pending, and invoices that are at Declined status.
Balance	This is the sum of all invoice balances where the invoice status is Unpaid or Declined minus pending payments for all invoices at Partially Paid and Paid status.
Total	This is the sum of all invoice amounts where the invoice status is Partially Paid, Unpaid, Paid, Declined, or Closed.

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