

Invoices

Introduction

The invoice page can be used to see all invoices for customers as well as specific totals based on pre set filters. To see the Invoices, on the side menu, click on Billing then click on Invoices. Clicking on the three bars on the top left corner of the page also expands the side menu to show more detail for easier access.

Invoices

After a delivery or service has been completed, an invoice will be generated and appear on this list for review before being posted. Having an invoice post will charge the customer for the service performed and will either be charged automatically after being posted if the customer has auto pay set up, or they will have to be manually charged on the collections portion of billing. Invoice should be thoroughly reviewed as once posted, it cannot be altered from both a technical and legal perspective. Once on the page, Invoices can be filtered by the following Date Range, Payment Type, Bill Type, Status and Brand. Once filters have been selected, the page will display Filtered totals which includes

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Invoices

My Time Board Map Search Admin Billing Collections Bank Deposits Invoices Service Plan Renewals Subscriptions Driver List Fuel Propane Exchange Reports Service Servicemen

Date Range: 12/01/2025 - 12/31/2025 Payment Type: All Bill Type: All Status: Incomplete Brand: All Export CSV

Filter ignores date ranges

Filtered Totals

Count	Subtotal	Tax	Deposit	Grand Total
0	\$0.00	\$0.00	\$0.00	\$0.00

Post Selected Email Selected View Invoices View Receipts

1 - 50 of 1083 << 1 2 3 4 5 >> 50

	Account T1	Invoice T1	Email T1	Mail T1	Last Name T1	Payment Type T1	Bill Date T1	Posted Date T1	Subtotal T1	Taxes T1	Deposit T1	Balance T1	Prev Bal T1	Amount Due T1	Bill Notes T1	Bill Type T1	Status T1
☐			☒	☒		Auto Pay	12/1/25		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		Service	
☐			☒	☒		Auto Pay	12/1/25		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		Subscription	
☐			☒	☒		Auto Pay	12/1/25		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		Oil Service	
☐			☒	☒		Auto Pay	12/1/25		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		Subscription	
☐			☒	☒		Auto Pay	12/1/25		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		Subscription	
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☐			☒	☒		Auto Pay	12/1/25		\$0.00	\$0.00							

- Status - Status of the invoice, whether checked or not

The report can also be exported to document format for easier printing and sharing by clicking on the Export CSV button on the top of the page next to the adjustable filters. Selecting an invoice will now allow for the following actions to be taken

- Post selected - Allows for the invoice to be posted and for the customer to be charged
- Email Selected - Allows for the invoice to be emailed out to the customer
- View Invoice - Allows for the invoice to be exported for easier sharing and printing
- View Receipt - Allows for the receipt of the invoice to be exported out for easier sharing or printing

Note that multiple invoice can be selected at once or all at once, this makes it easier for posting all invoices rather than having to do them one at a time. **MAKE SURE ALL** invoices are reviewed before posting, as once an invoice is posted, it cannot be undone

Revision #4

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