

# View Open/Paid Invoices

The **Financial Documents** feature in the Apptix Control Panel allows you to view and manage a variety of financial documents for your service. You may view and manage: pending orders, invoice status, and order and payment history.

1. Log into the Control Panel.

The Apptix Control Panel's main dashboard displays:

The screenshot shows the Apptix Control Panel dashboard for a user named Daniel Pietro (Account ID: 1024809). The dashboard is organized into several sections:

- Service Information:** Displays subscription details (SharePoint Enterprise - 10GB 500 Users), IP addresses (0 unit used of 1 unit), Diskspace (40.3 MB used of 10 GB), and SharePoint Sites (1 unit used of 1 unit). It includes links for [All Resource Usage](#) and [Subscription Resources](#).
- Exchange:** Provides facilities for managing mailboxes, public folders, distribution lists, contacts, and mail service settings. It includes links for [Add New Mailbox](#) and [Mailboxes](#).
- SharePoint:** Allows users to view and manage SharePoint sites and users, and configure administrator accounts. It includes links for [Add New Site](#), [Sites](#), [Add New User](#), and [Users](#).
- More Services:** A section for managing special features of the current subscription, with a link for [Boundary Defense for Email](#).
- Account:** Shows outstanding invoices for \$ 0.00 and provides links for [Financial Documents](#), [Payment Methods](#), [Admins](#), [Change Password](#), and [Subscriptions](#).
- Users:** A section for creating and managing users, with a link for [Create User](#).
- Store:** A section for purchasing additional services, domains, and more. It includes links for [Buy More Services](#), [Register New Domain](#), [Buy Additional Resources](#), and [Change Service Plan](#).
- Domains:** A section for managing domains and domain names, with links for [Registered Domains](#) and [Hosted Domains](#).

The dashboard also features a navigation menu (Home, Users, Exchange, SharePoint, More Services, Account, Help & Support), a user profile dropdown, a Logout button, and a Refresh button. A notification banner at the top indicates an unread notification from the provider.

2. Select the **Financial Documents** shortcut from the **Account** section of the main dashboard.
3. Select the **Invoices & Payments History** tab:

Panel > Account >

### Financial Documents

Help Refresh Up Level

Unpaid Orders & Invoices Open & Pending Orders **Invoices & Payments History** Orders History

Balance Information

Balance \$ 0.00

Balance Last Update Time 13-Jul-2012

AR Documents

New Payment

4 total Select Columns | Export To Excel

Document #	Document Type	Status	Total	Balance	Creation Date
CM121563	Credit Memo	Closed	\$ 26.87	\$ 0.00	13-Jul-2012
AR308067	Invoice	Closed	\$ 26.87	\$ 0.00	13-Jul-2012
CM121558	Credit Memo	Closed	\$ 323.75	\$ 0.00	13-Jul-2012
AR307462	Invoice	Closed	\$ 323.75	\$ 0.00	10-Jul-2012

4 total Select Columns | Export To Excel

4. To view a specific paid invoice, click the appropriate **Document Type** name.

The **Document Details** screen for the selected invoice displays:

Panel > Account > Financial Documents >

### Document # AR307462

Help Refresh Up Level

General Applications Service Usage Details

Document ID 634547

Document # AR307462

Customer 1024809 zzapptixtrainingdocumentation

Document Type Invoice

Status  Closed

Creation Time 10-Jul-2012 09:40:39

Document Date 10-Jul-2012

Due Date 09-Aug-2012

Total \$ 323.75

Tax Total \$ 0.00

Balance \$ 0.00

Description Order for Subscription on Plan #37448 (Premier Email - 25GB - 25+ User Plan) for 1 Month(s).

Download PDF Send Notification

Details

1 total Select Columns | Export To Excel

ID	Description	Quantity	Duration	Unit Price	Discount Amount	Extended Price	Subscription Name
1	Premier Email - 25GB - 25+ User Plan Recurring	1.00 Item	1.00 month (s)	\$ 323.75	\$ 0.00	\$ 323.75	Premier Email - 25GB - 25+ User Plan (abcdco.com)

1 total Select Columns | Export To Excel

5. On this screen, you can perform a number of tasks:
  - **[Download PDF]** – click this button to download a PDF copy of the invoice to your hard drive.
  - **[Send Notification]** – click this button to send an email containing this invoice to the prescribed recipient.
  - Select the **Applications** tab to view a list of payments and credits that have been applied to the selected invoice, such as credit memos, credit card payments, or check numbers.
6. Notice the **Select Columns** and **Export to Excel** links at the bottom of the **Document Details** screen:
  - **Select Columns** – view more or fewer columns of information for the list on this screen, including Subscription ID, SKU, and more.
  - **Export to Excel** – click this link to export the table on this screen to an Excel spreadsheet, which you can then choose to open or save to your hard drive.
7. To view open orders, select the **Open & Pending Orders** tab:

Order Number	Order Type	Order Date	Status	Total	Balance
<input checked="" type="checkbox"/> UG159528	Upgrade Order	23-May-2012	Manual Operation Required	\$ 1.95	\$ 1.95
<input type="checkbox"/> BO109201	Billing Order	13-Jul-2012	Waiting for Payment	\$ 138.35	\$ 0.00

8. Notice on this tab that the Control Panel enables you to pay for or cancel a selected order.
  - Select an order by placing a check mark in the appropriate checkbox, as above.
  - Click the button to pay for or cancel the selected order.
  - Follow the wizard instructions.
9. To view unpaid orders, select the **Unpaid Orders & Invoices** tab:

Document Number	Document Date	Type	Total	Balance	Comments
<input type="checkbox"/> AR307915	13-Jul-2012	Invoice	\$ 138.35	\$ 138.35	Monthly Invoice
<input type="checkbox"/> UG159528	23-May-2012	Upgrade Order	\$ 1.95	\$ 1.95	Upgrade/Downgrade of Resources for Subscription #1037572.

10. Notice that any unpaid documents list on this screen.
  - As in the previous example, you can select an unpaid order and pay for it now.
11. To view the transaction history for your service, select the **Orders History** tab:

Panel > Account >

### Financial Documents

Refresh Up Level

Unpaid Orders & Invoices Open & Pending Orders Invoices & Payments History **Orders History**

Orders

15 total Select Columns | Export To Excel

Order Number	Order Type	Order Date	Status	Total
SO115264	Sales Order	10-Feb-2012	Completed	\$ 109.50
SO115265	Sales Order	10-Feb-2012	Completed	\$ 0.00
UG153268	Upgrade Order	10-Feb-2012	Completed	\$ 5.90
BO105248	Billing Order	13-Feb-2012	Completed	\$ 115.40
RN231283	Renewal Order	11-Mar-2012	Completed	\$ 0.00
BO105928	Billing Order	13-Mar-2012	Completed	\$ 115.40
RN236016	Renewal Order	12-Apr-2012	Completed	\$ 0.00
BO106684	Billing Order	13-Apr-2012	Completed	\$ 135.40
RN240564	Renewal Order	12-May-2012	Completed	\$ 0.00
BO107495	Billing Order	13-May-2012	Completed	\$ 135.40
UG159528	Upgrade Order	23-May-2012	Manual Operation Required	\$ 1.95
RN245119	Renewal Order	12-Jun-2012	Completed	\$ 0.00
BO108341	Billing Order	13-Jun-2012	Completed	\$ 138.35
RN249684	Renewal Order	12-Jul-2012	Completed	\$ 0.00
BO109201	Billing Order	13-Jul-2012	Waiting for Payment	\$ 138.35

15 total Select Columns | Export To Excel

12. Notice that all orders for your service are listed on this screen, including the **Order Date** and order **Status**.