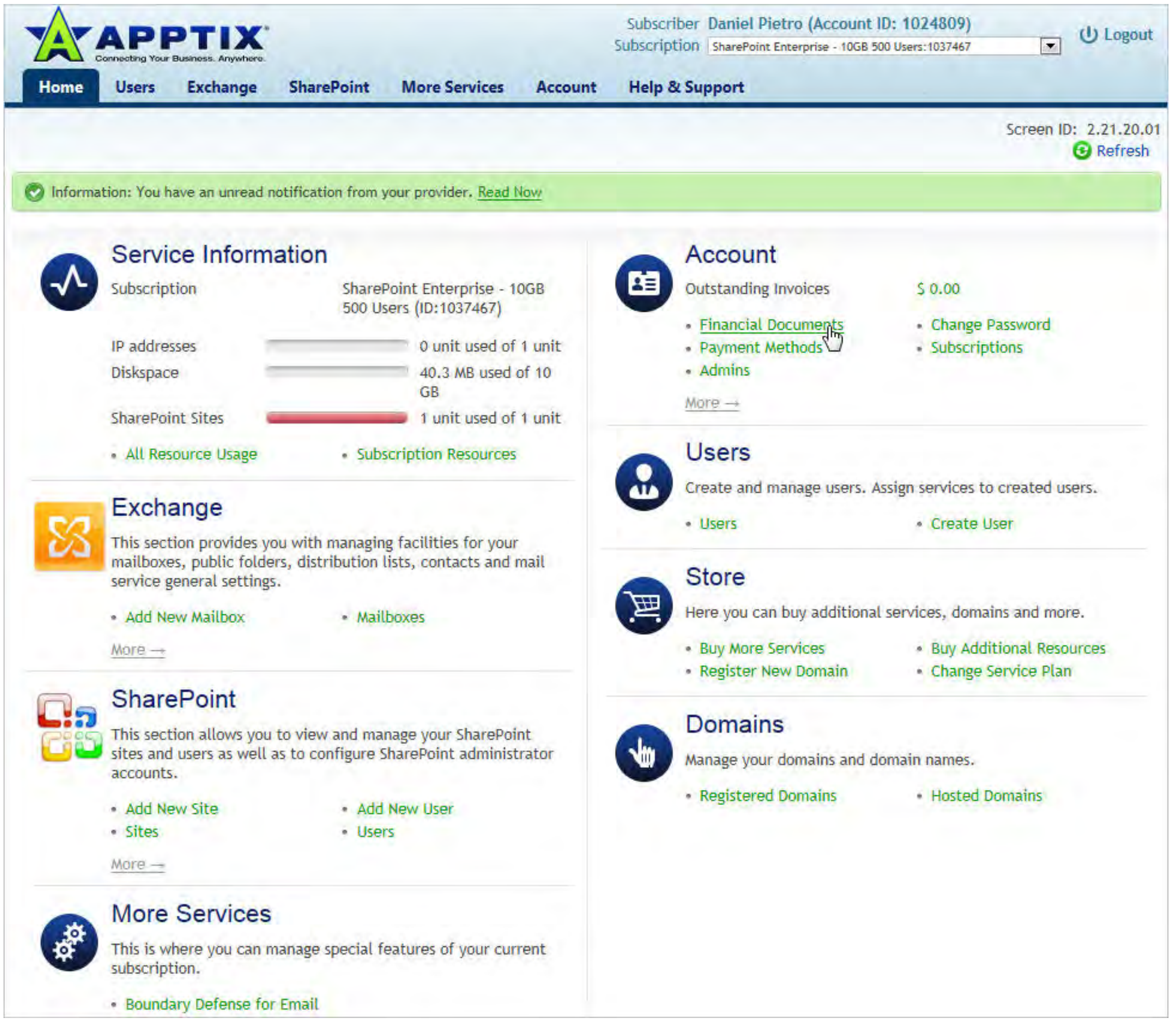
Using the Apptix Control Panel

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.

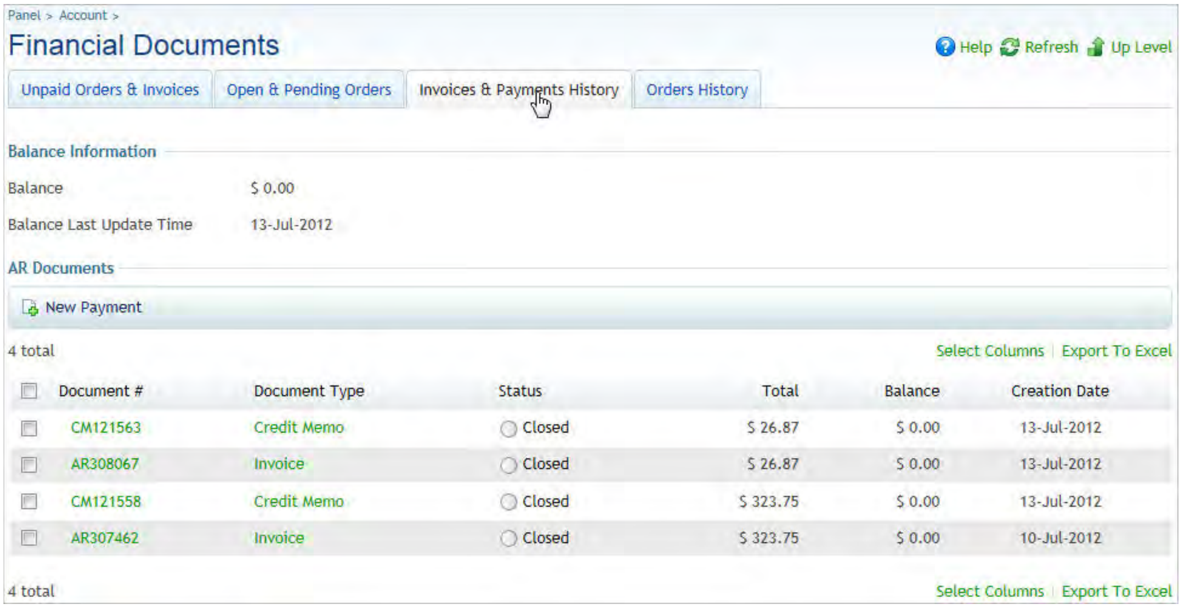
1. Log into the Control Panel.

   The Apptix Control Panel's main dashboard displays:



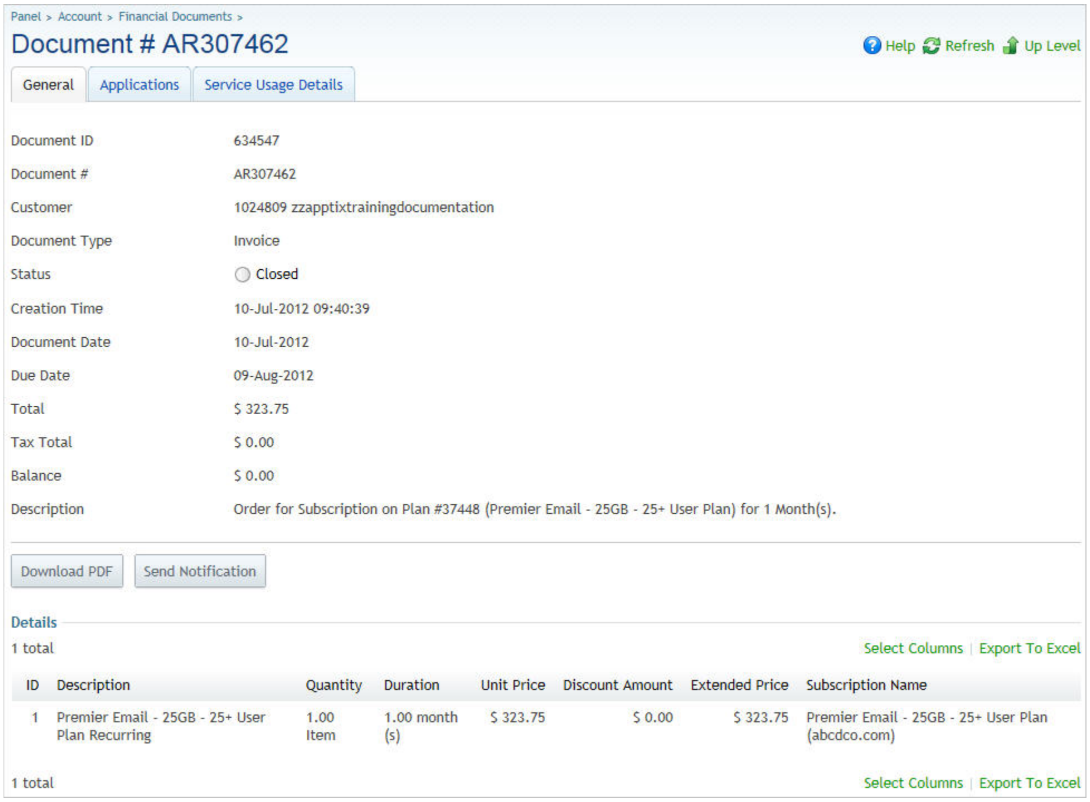
2. Select the **Financial Documents** shortcut from the **Account** section of the main dashboard.

3. Select the **Invoices & Payments History** tab:



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

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



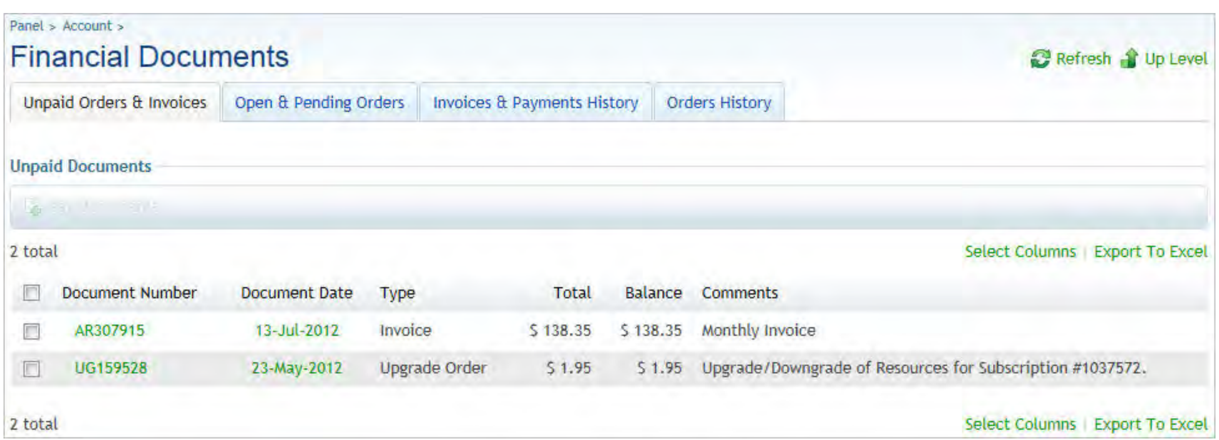
5. On this screen, you can perform a number of tasks:
    - **[Download PDF]** – click this button to download a PDF copy of the invoice to your hard drive.
    - **[Send Notification]** – click this button to send an email containing this invoice to the prescribed recipient.
    - Select the **Applications** 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:

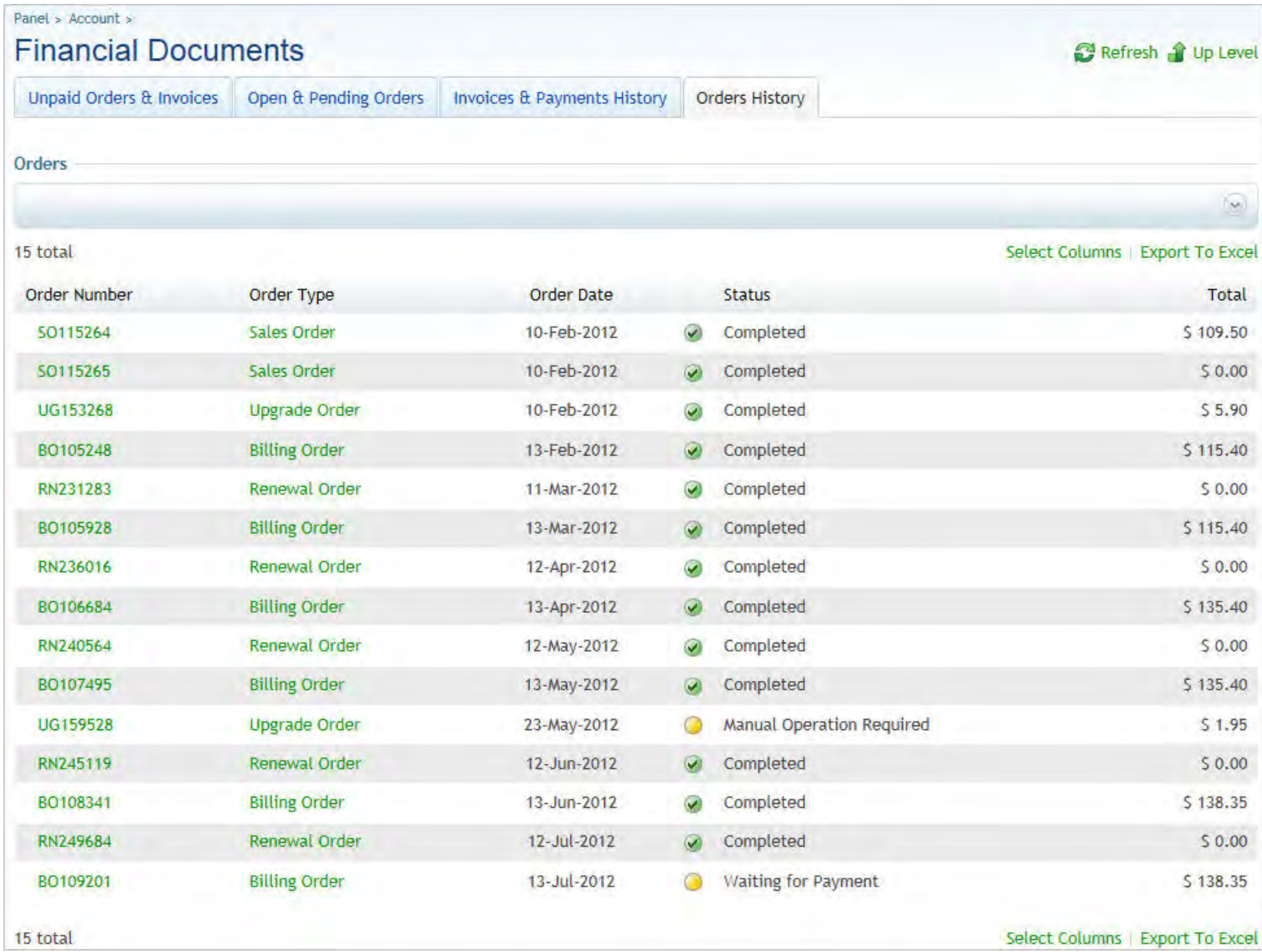
8. Notice on this tab that the Control Panel enables you to pay for or cancel a selected order.
    - Select an order by placing a check mark in the appropriate checkbox, as above.
    - Click the button to pay for or cancel the selected order.
    - Follow the wizard instructions.

9. To view unpaid orders, select the **Unpaid Orders & Invoices** tab:



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**.