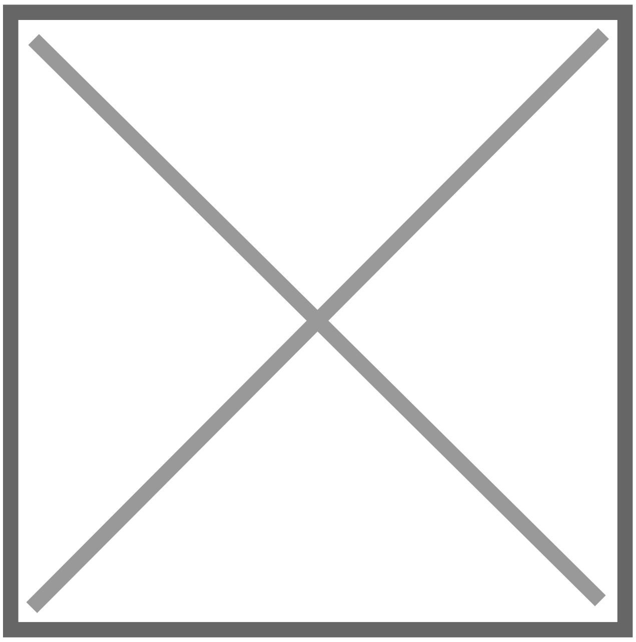
A/R Balances Summary for Invoices

Does your client need an aging report?

The new A/R Balances Summary reports the status of un-paid balances directly on your client’s invoice. To get started with this new add-on, log into your account and below the welcome message, select settings.

Within your Firm Settings, navigate to:

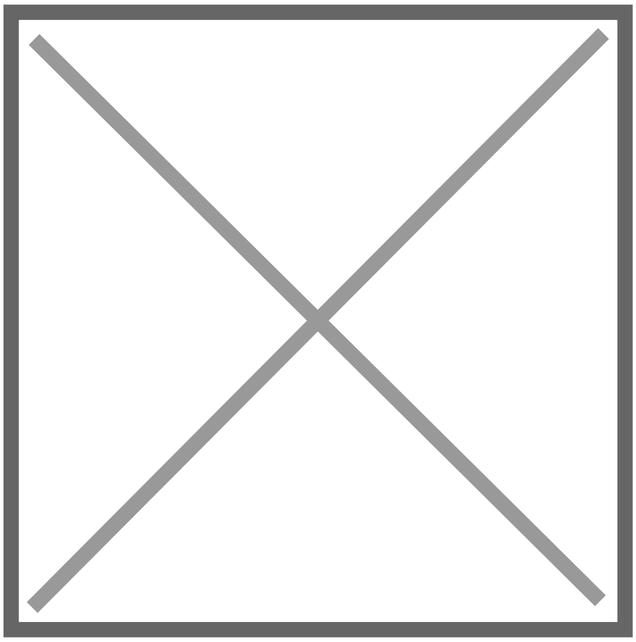
Invoice Setup



This add-on can be applied to one or all new and existing templates.If you need an A/R Balances Summary for some and not all clients, create a separate template and apply at the client level.

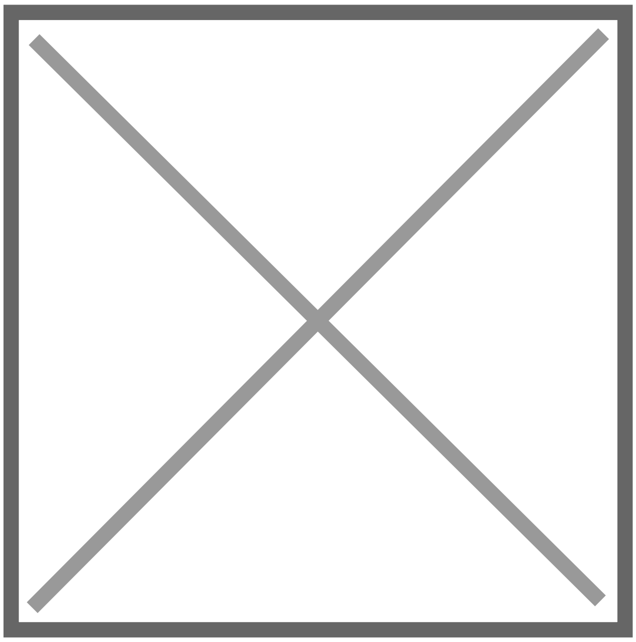
Once a template has been chosen to adjust, click:

Edit Settings Icon

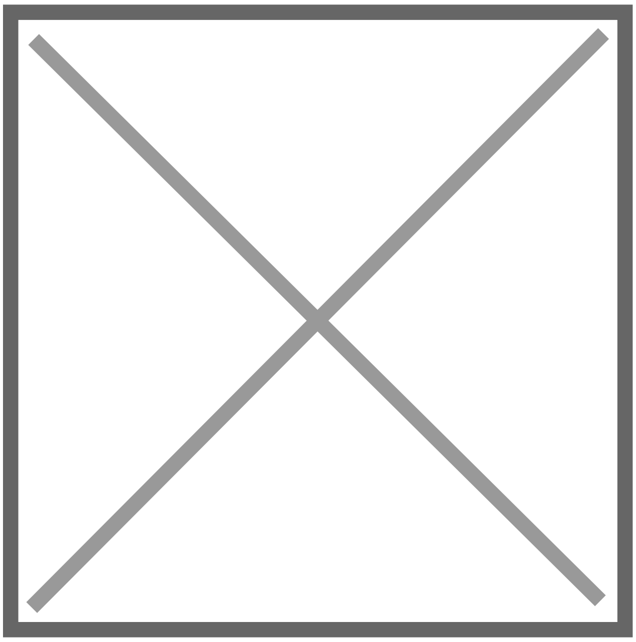


Located at the bottom in the Invoice Add-Ons group, select Attach A/R Balances Summary:

Checkbox & Save



Your Invoice Template will now show balances that are current and 30/60/90 days past due.



This add-on is a product of our Ideas & Feature Requests page. Do you need a feature or have an idea for Bill4Time? Submit a request here.