

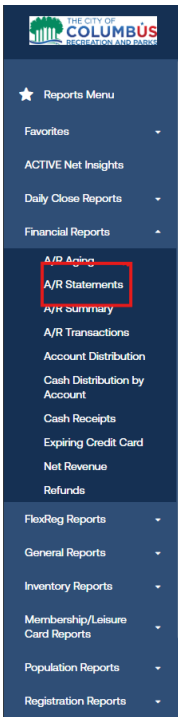
# Create an Invoice

03/12/2026 12:57 pm EDT

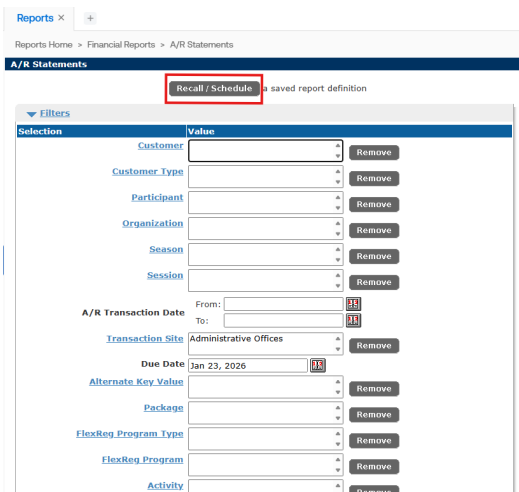
To create an invoice, click Reports on the top banner.



Then click Financial Reports on the left-hand side and click A/R Statements:



Click on Recall / Schedule:



Click Rental Services Invoice:

Title	Schedule	Delete
Rental Services Invoice	<a href="#">Edit</a>	<a href="#">Delete</a>

[Back](#)

Click on Customer and find the customer you are invoicing:

▼ [Filters](#)

Selection	Value	
<b>Customer</b>	<input type="text"/>	<a href="#">Remove</a>
<a href="#">Customer Type</a>	<input type="text"/>	<a href="#">Remove</a>
<a href="#">Participant</a>	<input type="text"/>	<a href="#">Remove</a>
<a href="#">Organization</a>	<input type="text"/>	<a href="#">Remove</a>
<a href="#">Season</a>	<input type="text"/>	<a href="#">Remove</a>
<a href="#">Session</a>	<input type="text"/>	<a href="#">Remove</a>
<b>A/R Transaction Date</b>	From: <input type="text"/> <input type="text"/>	
	To: <input type="text"/> <input type="text"/>	
<a href="#">Transaction Site</a>	<input type="text"/>	<a href="#">Remove</a>
<b>Due Date</b>	<input type="text"/> <input type="text"/>	
<a href="#">Alternate Key Value</a>	<input type="text"/>	<a href="#">Remove</a>
<a href="#">Package</a>	<input type="text"/>	<a href="#">Remove</a>
<a href="#">FlexReg Program Type</a>	<input type="text"/>	<a href="#">Remove</a>
<a href="#">FlexReg Program</a>	<input type="text"/>	<a href="#">Remove</a>
<a href="#">Activity</a>	<input type="text"/>	<a href="#">Remove</a>
<a href="#">Activity Category</a>	<input type="text"/>	<a href="#">Remove</a>

The due date should be the event date.

In the Options drop-down Report Title should be "Invoice # R####"

The invoice number is the permit number.

Options

Name	Values
A/R Statement Text	Your account balance is now due. Please remit payment promptly. If you have questions about your invoice please, contact our office
Overdue A/R Statement Text	
Run Report Based on A/R Aging	<input type="checkbox"/>
Print as Invoice	<input type="checkbox"/>
Report Title	Invoice #
Include A/R Aging Schedule?	<input type="checkbox"/>
Include Residential Address	<input type="checkbox"/>
Exclude Automatic Payment Plan Customers	<input type="checkbox"/>
Include Participant Name?	<input type="checkbox"/>
Include Payment Plan Details?	<input type="checkbox"/>
Display Future Due Amount?	<input type="checkbox"/>
Include Reserved Event Dates?	<input type="checkbox"/>
Include Zero Balance Accounts?	<input type="checkbox"/>
Company	All
No Statements Where Balance Due By Amount Is 0?	<input checked="" type="checkbox"/>
Hide Credit Card Prompt Information?	<input checked="" type="checkbox"/>
Report Module	<input type="checkbox"/> Registration <input type="checkbox"/> Daycare <input checked="" type="checkbox"/> Facilities <input type="checkbox"/> Membership/Leisure Card <input type="checkbox"/> POS <input type="checkbox"/> All Others
Output Format	Summarize Charges
Statement Action	Print statements for all customers
Payment Plans	All
Retired	All Customers
Residency	All Customers
Output Type	Adobe Acrobat Reader

Run Report

And click Run Report.



Administrative Offices

1111 E Broad St  
Columbus, OH, US 43205  
(614) 645-3300

Invoice # R1111

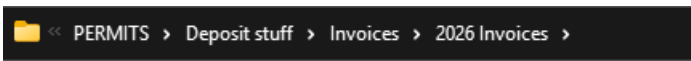
Cox, Steve  
18169 Timber Trails Rd  
Marysville, OH 43040  
USA

Customer # 98630  
Phone # (614) 736-0536

STATEMENT DATE	TOTAL CHARGES	TOTAL PAID	CREDIT ON ACCOUNT	TOTAL BALANCE DUE	BALANCE DUE BY Apr 4, 2026
Jan 23, 2026 3:20 PM	\$10,670.00	\$0.00	\$0.00	\$10,670.00	\$10,670.00

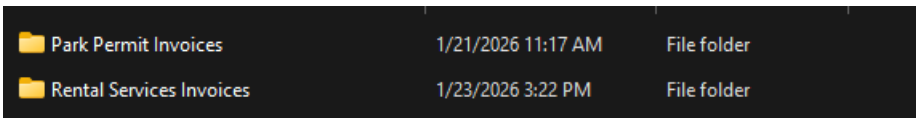
Receipt (Permit) Number	Payment Schedule	Next Due Date	Next Amount Due
3005345.051 Permit: R2328	1 Payment(s)	Due Now	2,750.00
3005385.051 Permit: R2344	1 Payment(s)	Due Now	1,600.00
3005395.051 Permit: R2350	1 Payment(s)	Due Now	6,320.00

Save the Invoice in the P Drive:



And then name the file the Invoice # R\_-----

put in the correct folder:



And then send the invoice to the customer with the template, and be sure to fill out the Invoice

Form.

Which can be found here:

[Invoices](#)

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