Accounts

The ?General? section contains the demographic information for the customer

The ?Billing? section contains the following:

a. the statistical details. in the left-hand column:

i. MRC (monthly recurring charges)
ii. Unbilled NRC (non-recurring charges)
iii. Unbilled Usage charges
iv. The current outstanding balance
v. The current past due amount
vi. The total amount of Un-applied Payments, Credit Notes and Adjustments
vii. The Current portion of the outstanding balance
viii. The portion of the outstanding balance that is over 30 days and under 60 days
ix. The portion of the outstanding balance that is over 60 days and under 90 days
x. The portion of the outstanding balance that is over 90 days
xi. The total of the disputed amounts that have been invoiced

b. The parameters that affect how this customer is billed, in the right-hand column:

i. The Commercial Name under which this customer will be billed
ii. The Billing Cycle (day-of-the-month on which the customer will be billed)
iii. The customer?s Pre-authorized Payment Profile (credit card or bank information)
iv. The customer?s Payment Terms (Payable upon receipt, Net 30 days, etc.)
v. The invoice delivery method for this customer (Attached to E-mail, E-mail containing a on-line link (URL) to the invoice, Printed & sent by postal service, etc.)
vi. The amount of the Security Deposit held on behalf of this customer
vii. The date on which invoices will begin to be generated
viii. The Template (layout) of the invoice generated for this customer
ix. The Template (column layout and format: .csv/.xls, etc.) of the usage transaction file generated for this customer
x. The Group to which this customer belongs for the purpose of generating invoices
xi. The Purchase Order number to be displayed on the Invoice
xii. A flag determining whether or not to send late payment notifications to this customer
xiii. A flag determining whether or not to charge late payment fees to this customer
xiv. The Accounts Receivable G/L account within which this customer should be accumulated (Allows for managing multiple A/R control accounts for different currencies, regions or categories of customers)

The Documents section lists any documents (contracts, quotes, purchase orders, etc.) that users may wish to attach to this customer.

The Contact section displays a series of ?business cards? containing the contact information for people related to his customer account.

If any additional sets of ?Custom Fields' are defined (for all Customers), they are displayed at the bottom of the UI screen.

http://wiki.smartbilling.ca/index.php/File:Customer_Billing_information.mp4

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