

QRG PAY.6 – Creating a Termite or Bait Warranty Invoice

1. Click on the customers account from the account screen
2. From the customer account, select the Sales Tab. Navigate to the order for the Termite or Bait program.
3. Check the box next to Bill Now and Save.
4. Scroll up on the order to view the Warranty Invoice (Renewal Invoice) in the related list and click on the invoice. Verify the value of the invoice is accurate.
5. Update the status from Draft to Posted and click Save.

The screenshots illustrate the following steps:

- Step 1:** A table of accounts with columns for Account Name, Residential, Account Record T..., Phone, Account..., and Email. A red box labeled '1' highlights the 'Account Name' column.
- Step 2:** A pop-up window for an order (00120301) with fields for Account Name, Order Start Date, Order Amount, Status, and Order Type. A red box labeled '2' highlights the 'Status' field.
- Step 3:** A form with a 'Bill Now' checkbox and a 'Save' button. A red box labeled '3' highlights the 'Bill Now' checkbox.
- Step 4:** A pop-up window for an invoice (INV-39414) with fields for Invoice Number, Days Outstanding, Status, and Product. A red box labeled '4' highlights the 'Status' field.
- Step 5:** An 'Invoice Status Information' form with a 'Status' dropdown menu set to 'Posted' and a 'Save' button. A red box labeled '5' highlights the 'Status' dropdown.