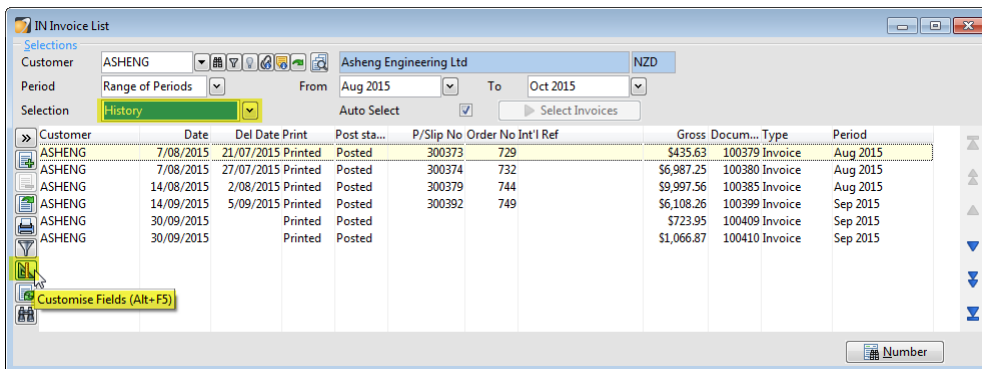


## Tips & Tricks

### See who has paid from the Invoice list

Did you know you can see at a glance whether an Invoice has been paid, just by adding the FULLY ALLOCATED field to the Invoice List? You may also find it useful to add PERIOD FULLY ALLOCATED and UNALLOCATED AMOUNT and/or UNALLOCATED AMOUNTBs to the Invoice List.

- 1 Go to: Maintain > Invoicing System > Invoice List > Select History.
- 2 Click **Customise Fields** (Alt+F5).



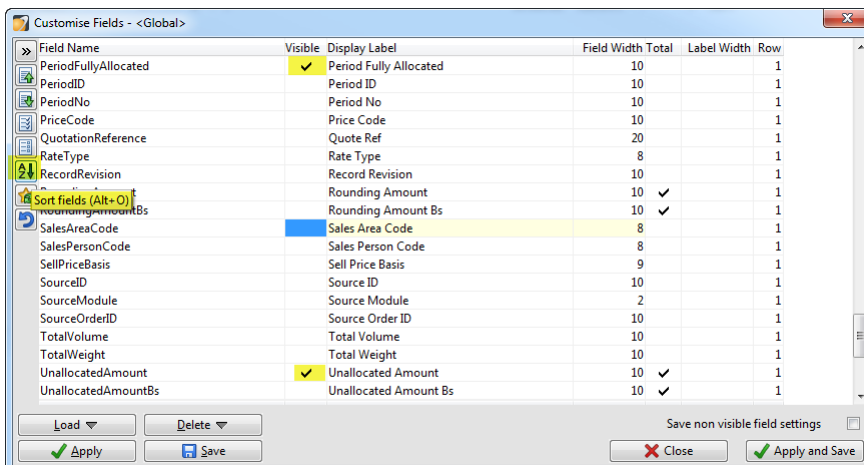
Scroll down and select the required fields from:

FULLY ALLOCATED

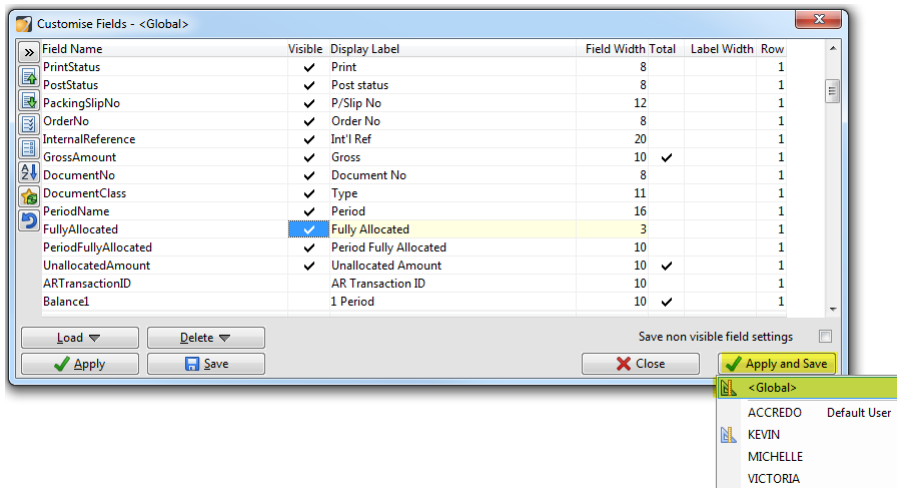
PERIOD FULLY ALLOCATED

UNALLOCATED AMOUNT \ UNALLOCATED AMOUNTBs

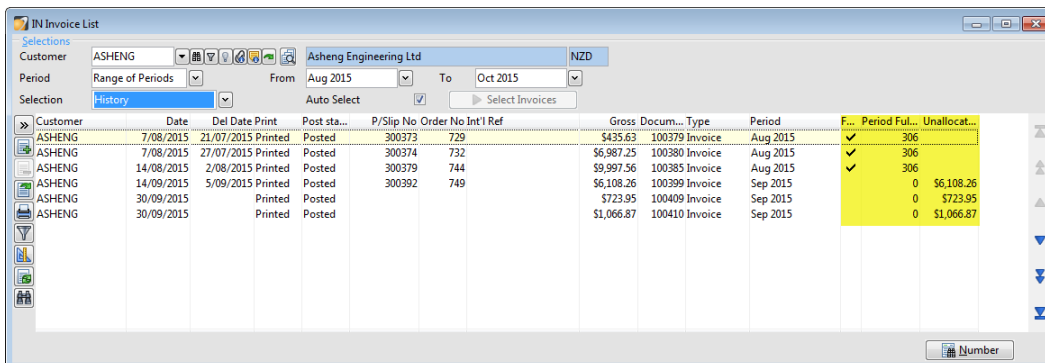
You can then click the **Sort Fields** (Alt+O) button so these fields show underneath the already visible fields, making it easier to sort further if you need to.



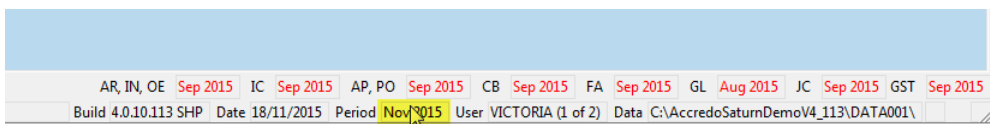
3 Click **Apply and Save** <GLOBAL> to apply this view to all Users who don't have their own Customisations, or click **Apply and Save** and select a User Code to Apply this view to. A Customise icon beside a User code means that User has their own Customisations as shown for user **Kevin** below.



The Invoice List in this example now shows FULLY ALLOCATED, PERIOD (ID) FULLY ALLOCATED, and the UNALLOCATED AMOUNT for each Invoice.



4 Note: The easiest way to find out the PERIOD NAME of the PERIOD ID, is to click the PERIOD on the Accredo lower toolbar.



Click the drop down arrow beside the SYSTEM PERIOD to see the PERIOD NAME that relates to the PERIOD ID.

In the example above we now know that Period ID **306** is **September 2015**.

The screenshot shows a software dialog box titled "Enter System Date". It contains two input fields: "System Period" with "Nov 2015" selected and a dropdown arrow, and "System Date" with "Year Ending Mar 2016" selected and a dropdown arrow. Below these fields is an "OK" button with a green checkmark. A context menu is open over the "System Period" field, showing options: "Lookup (F2)", "Previous Value (F7)", and "Next Value (F8)". In the background, a table lists system periods from Sep 2014 to May 2016. The row for "Sep 2015" is highlighted in yellow, and its "Period ID" is 306.

Name	Lookup (F2)	Previous Value (F7)	Next Value (F8)	Date	End Date	Period ID
Sep 2014				2014	30/09/2014	206
Oct 2014	Open			1/10/2014	31/10/2014	207
Nov 2014	Open			1/11/2014	30/11/2014	208
Dec 2014	Open			1/12/2014	31/12/2014	209
Jan 2015	Open			1/01/2015	31/01/2015	210
Feb 2015	Open			1/02/2015	28/02/2015	211
Mar 2015	Open			1/03/2015	31/03/2015	212
Apr 2015	Open			1/04/2015	30/04/2015	301
May 2015	Open			1/05/2015	31/05/2015	302
Jun 2015	Open			1/06/2015	30/06/2015	303
Jul 2015	Open			1/07/2015	31/07/2015	304
Aug 2015	Open			1/08/2015	31/08/2015	305
Sep 2015	Open			1/09/2015	30/09/2015	306
Oct 2015	Open			1/10/2015	31/10/2015	307
Nov 2015	Open			1/11/2015	30/11/2015	308
Dec 2015	Open			1/12/2015	31/12/2015	309
Jan 2016	Open			1/01/2016	31/01/2016	310
Feb 2016	Open			1/02/2016	29/02/2016	311
Mar 2016	Open			1/03/2016	31/03/2016	312
Apr 2016	Open			1/04/2016	30/04/2016	401
May 2016	Open			1/05/2016	31/05/2016	402