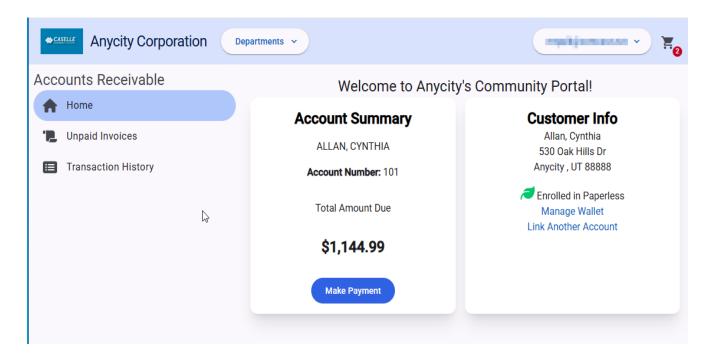


Caselle Community Portal Accounts Receivable

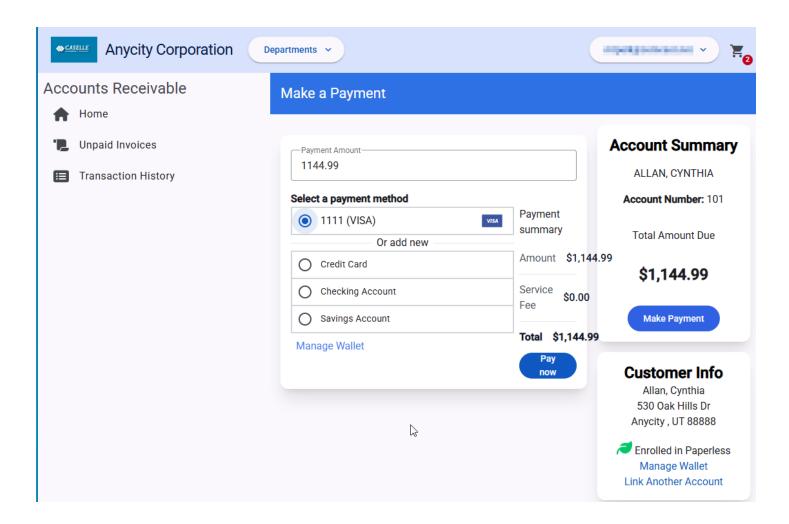
Accounts Receivable Dashboard



- 1. Home Account Summary
- 2. Make Payment
- 3. Enroll in Paperless
- 4. Link Account
- 5. Unpaid Invoices
- 6. Transaction History

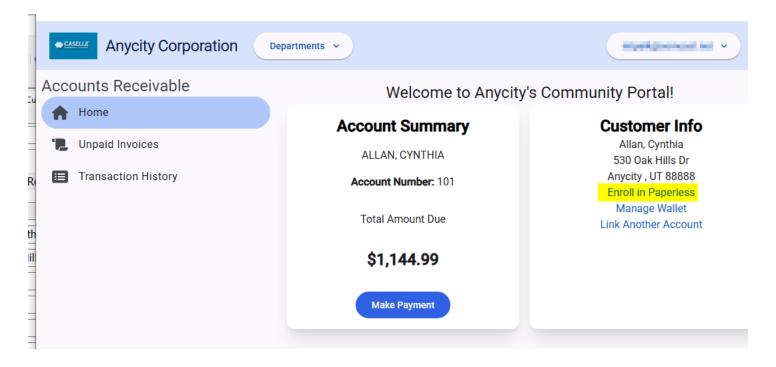


Make a Payment





Enroll in Paperless



Once customer selects Enroll in Paperless it will update two fields in Caselle's Accounts Receivable

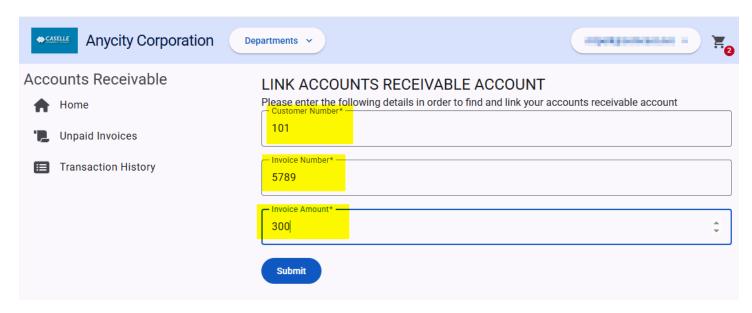
- 1. Loads the email address in Modify Existing Customer
- 2. Unchecks the Send paper statement field



Caselle Connect® → > Accounts Receivable → > Customers → > Modify Existing Customers Caselle Connect® Modify Existing Customers 🔯	
Customer:	Customers 🔟
Customer: 101 Allan, Cy	
Customer Bill-To Recurring Billings Recurring Invoices Attachments User-Defined Notes	
Customer number:	101
Name:	Allan, Cynthia
Address line 1:	530 Oak Hills Dr
Address line 2:	
City:	Anycity
State/Province:	UT
Zip/Postal code:	88888 Delivery point:
Country/Region:	
Mail route:	
Attention:	
Telephone 1:	555-4567
Telephone 2:	
Fax:	
Email:	
Social Security number:	
Driver license number:	
☑ Subject to penalty	
☑ Send statement	
☐ Send paper statement	



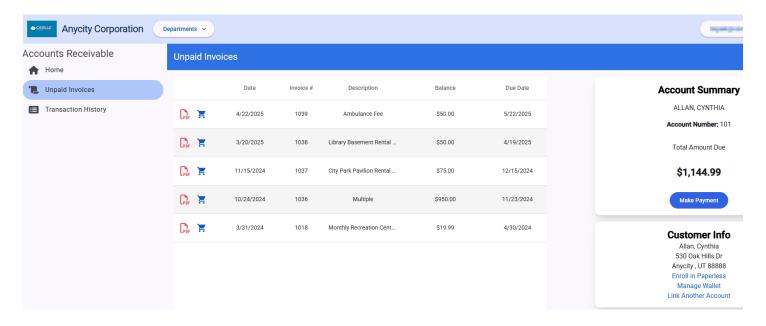
Link Account



- 1. Customer Number
- 2. Invoice Number
- 3. Invoice Amount
- 4. Submit



Unpaid Invoices

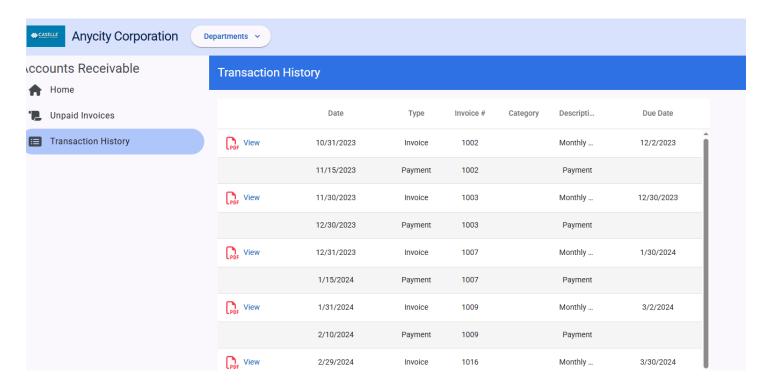


- 1. Select on PDF to view invoice
- 2. Click on shopping cart to pay invoice or add to shopping cart to pay multiple invoices





Transaction History



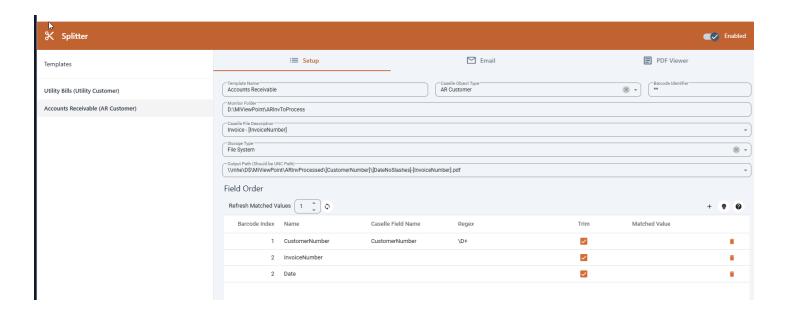
AR Splitter Invoices

AR Splitter Invoices

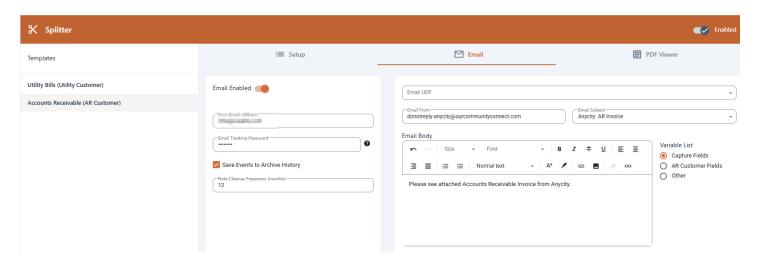
- 1. miViewPoint Splitter Setup
- 2. AR Invoice Form Setup
- 3. Preview AR Splitter Invoice to Upload to Portal and Email Invoice



miViewPoint Splitter Setup



Email Splitter Setup

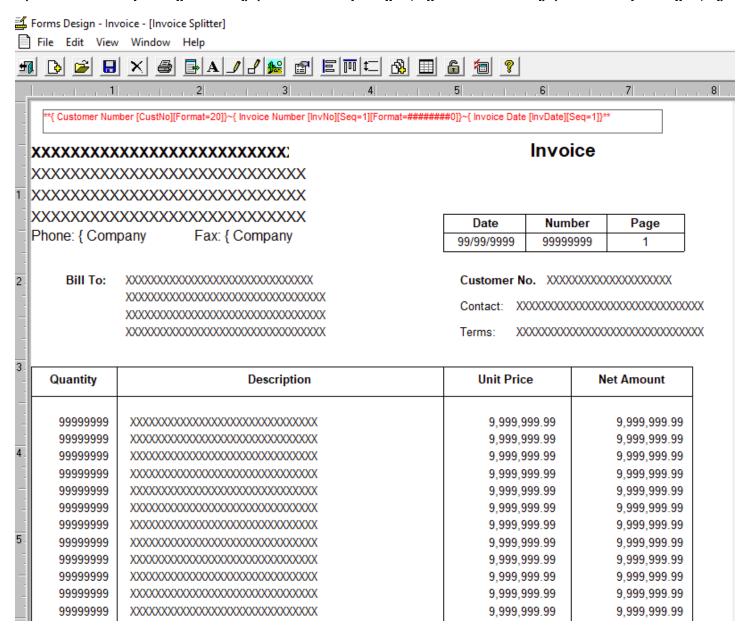




AR Invoice Form Setup

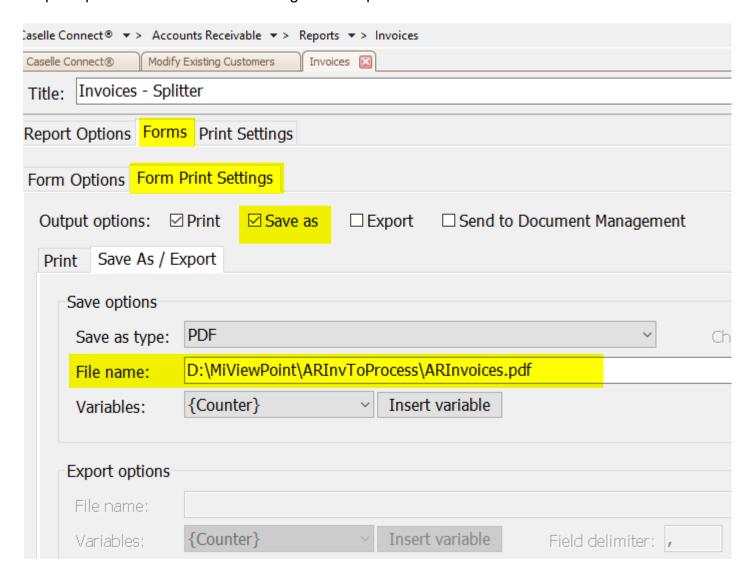
Caselle Connect > Account Receivable > Reports > Invoices Edit the AR Form and add the splitter variable

{ Customer Number [CustNo][Format=20]}~{ Invoice Number [InvNo][Seq=1][Format=#######0]}~{ Invoice Date [InvDate][Seq=1]}





Map the path on the Form Print Settings to the Splitter Process Folder on Caselle server





Preview AR Invoice Splitter Form to upload invoices to the portal and email invoices to customers who have signed up for paperless invoices

