



Caselle Community Portal Accounts Receivable

Accounts Receivable Dashboard

The screenshot shows the 'Accounts Receivable' dashboard for 'Anycity Corporation'. The header includes the Caselle logo, the company name, a 'Departments' dropdown, and a search bar. The left sidebar lists navigation options: Home (selected), Unpaid Invoices, and Transaction History. The main content area is titled 'Welcome to Anycity's Community Portal!' and features two primary cards. The 'Account Summary' card displays the account holder's name 'ALLAN, CYNTHIA', the 'Account Number: 101', the 'Total Amount Due' as '\$1,144.99', and a 'Make Payment' button. The 'Customer Info' card shows the customer's name 'Allan, Cynthia', address '530 Oak Hills Dr, Anycity, UT 88888', and a status 'Enrolled in Paperless' with links for 'Manage Wallet' and 'Link Another Account'. A shopping cart icon with a '2' badge is visible in the top right corner.

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



Make a Payment

Anycity Corporation

Departments ▾

SEARCH

ACCOUNTS RECEIVABLE

2

Accounts Receivable

Home

Unpaid Invoices

Transaction History

Make a Payment

Payment Amount

1144.99

Select a payment method

☒ 1111 (VISA)

VISA

Or add new

☐ Credit Card

☐ Checking Account

☐ Savings Account

Manage Wallet

Payment summary

Amount \$1,144.99

Service Fee \$0.00

Total \$1,144.99

Pay now

Account Summary

ALLAN, CYNTHIA

Account Number: 101

Total Amount Due

\$1,144.99

Make Payment

Customer Info

Allan, Cynthia

530 Oak Hills Dr

Anycity , UT 88888

Enrolled in Paperless

Manage Wallet

Link Another Account



Enroll in Paperless

The screenshot shows the user interface of the Anycity Corporation Accounts Receivable portal. At the top, there is a blue header with the CASELLE logo and the text "CASELLE software elevated". Below the header, the page title "Anycity Corporation" is displayed, followed by a "Departments" dropdown menu. The main content area is divided into two columns. The left column contains a sidebar with the title "Accounts Receivable" and three menu items: "Home" (highlighted with a blue background), "Unpaid Invoices", and "Transaction History". The right column contains a "Welcome to Anycity's Community Portal!" message. Below the welcome message, there are two main sections: "Account Summary" and "Customer Info". The "Account Summary" section displays the customer name "ALLAN, CYNTHIA", the "Account Number: 101", the "Total Amount Due" of "\$1,144.99", and a "Make Payment" button. The "Customer Info" section displays the customer's name "Allan, Cynthia", address "530 Oak Hills Dr", and city "Anycity, UT 88888". Below the address, the "Enroll in Paperless" link is highlighted with a yellow background, and there are also links for "Manage Wallet" and "Link Another Account".

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:

Customer: 101 Allan, Cynthia

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

 **Anycity Corporation** Departments ▾ SEARCH 

Accounts Receivable
 Home
 Unpaid Invoices
 Transaction History

LINK ACCOUNTS RECEIVABLE ACCOUNT

Please enter the following details in order to find and link your accounts receivable account

Customer Number*

101

Invoice Number*

5789

Invoice Amount*

300

Submit

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



Unpaid Invoices

CASELLE
Anycity Corporation
Departments

Accounts Receivable
Unpaid Invoices
Transaction History

Unpaid Invoices

| | Date | Invoice # | Description | Balance | Due Date |
|--|------------|-----------|-------------------------------|----------|------------|
| | 4/22/2025 | 1039 | Ambulance Fee | \$50.00 | 5/22/2025 |
| | 3/20/2025 | 1038 | Library Basement Rental ... | \$50.00 | 4/19/2025 |
| | 11/15/2024 | 1037 | City Park Pavilion Rental ... | \$75.00 | 12/15/2024 |
| | 10/24/2024 | 1036 | Multiple | \$950.00 | 11/23/2024 |
| | 3/31/2024 | 1018 | Monthly Recreation Cent... | \$19.99 | 4/30/2024 |

Account Summary

ALLAN, CYNTHIA

Account Number: 101

Total Amount Due

\$1,144.99

[Make Payment](#)

Customer Info

Allan, Cynthia
530 Oak Hills Dr
Anycity, UT 88888
[Enroll in Paperless](#)
[Manage Wallet](#)
[Link Another Account](#)

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

ANYCITY CORPORATION
10 N Commerce
PO Box 123
Anycity UT 88888
Phone: 333-555-1122 Fax: 333-555-1212

INVOICE

| Date | Number | Page |
|------------|--------|------|
| 11/15/2024 | 1037 | 1 |

Bill To: Allan, Cynthia
530 Oak Hills Dr
Anycity UT 88888

Customer No.: 101
Contact:
Terms: Net 30

| Quantity | Description | Unit Price | Net Amount |
|----------|-------------------------------|--------------------|------------|
| 3 | City Park Pavilion Rental Fee | 25.00 | 75.00 |
| | | Amount | 75.00 |
| | | Freight | |
| | | Balance Due | 75.00 |



Transaction History

CASELLE

Anycity Corporation

Departments ▾

Accounts Receivable

Home

Unpaid Invoices

Transaction History

Transaction History

| | Date | Type | Invoice # | Category | Descripti... | Due Date |
|------|------------|---------|-----------|----------|--------------|------------|
| View | 10/31/2023 | Invoice | 1002 | | Monthly ... | 12/2/2023 |
| | 11/15/2023 | Payment | 1002 | | Payment | |
| View | 11/30/2023 | Invoice | 1003 | | Monthly ... | 12/30/2023 |
| | 12/30/2023 | Payment | 1003 | | Payment | |
| View | 12/31/2023 | Invoice | 1007 | | Monthly ... | 1/30/2024 |
| | 1/15/2024 | Payment | 1007 | | Payment | |
| View | 1/31/2024 | Invoice | 1009 | | Monthly ... | 3/2/2024 |
| | 2/10/2024 | Payment | 1009 | | Payment | |
| View | 2/29/2024 | Invoice | 1016 | | Monthly ... | 3/30/2024 |

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

Splitter

Enabled

Templates

Utility Bills (Utility Customer)

Accounts Receivable (AR Customer)

Setup

Email

PDF Viewer

Template Name
Accounts Receivable

Caselle Object Type
AR Customer

Barcode Identifier
**

Monitor Folder
D:\MiViewPoint\ARInvToProcess

Caselle File Description
Invoice - [InvoiceNumber]

Storage Type
File System

Output Path (Should be UNC Path)
\\mhe\DS\MiViewPoint\ARInvProcessed\CustomerNumber\DateNoSlashes-[InvoiceNumber].pdf

Field Order

Refresh Matched Values 1

| Barcode Index | Name | Caselle Field Name | Regex | Trim | Matched Value |
|---------------|----------------|--------------------|-------|-------------------------------------|---------------|
| 1 | CustomerNumber | CustomerNumber | \D+ | <input checked="" type="checkbox"/> | |
| 2 | InvoiceNumber | | | <input checked="" type="checkbox"/> | |
| 2 | Date | | | <input checked="" type="checkbox"/> | |

Email Splitter Setup

Splitter

Enabled

Templates

Utility Bills (Utility Customer)

Accounts Receivable (AR Customer)

Setup

Email

PDF Viewer

Email Enabled ☒

Email Tracking Password *****

☒ Save Events to Archive History

Note Cleanup Frequency (months)
12

Email UDF

Email From
donotreply-@ourcommunityconnect.com

Email Subject
Anycity AR Invoice

Email Body

Variable List

☒ Capture Fields

☐ AR Customer Fields

☐ Other

Please see attached Accounts Receivable Invoice from Anycity.



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]}

Forms Design - Invoice - [Invoice Splitter]

File Edit View Window Help

| Quantity | Description | Unit Price | Net Amount |
|----------|------------------------------|--------------|--------------|
| 99999999 | XXXXXXXXXXXXXXXXXXXXXXXXXXXX | 9,999,999.99 | 9,999,999.99 |
| 99999999 | XXXXXXXXXXXXXXXXXXXXXXXXXXXX | 9,999,999.99 | 9,999,999.99 |
| 99999999 | XXXXXXXXXXXXXXXXXXXXXXXXXXXX | 9,999,999.99 | 9,999,999.99 |
| 99999999 | XXXXXXXXXXXXXXXXXXXXXXXXXXXX | 9,999,999.99 | 9,999,999.99 |
| 99999999 | XXXXXXXXXXXXXXXXXXXXXXXXXXXX | 9,999,999.99 | 9,999,999.99 |
| 99999999 | XXXXXXXXXXXXXXXXXXXXXXXXXXXX | 9,999,999.99 | 9,999,999.99 |
| 99999999 | XXXXXXXXXXXXXXXXXXXXXXXXXXXX | 9,999,999.99 | 9,999,999.99 |
| 99999999 | XXXXXXXXXXXXXXXXXXXXXXXXXXXX | 9,999,999.99 | 9,999,999.99 |
| 99999999 | XXXXXXXXXXXXXXXXXXXXXXXXXXXX | 9,999,999.99 | 9,999,999.99 |
| 99999999 | XXXXXXXXXXXXXXXXXXXXXXXXXXXX | 9,999,999.99 | 9,999,999.99 |
| 99999999 | XXXXXXXXXXXXXXXXXXXXXXXXXXXX | 9,999,999.99 | 9,999,999.99 |
| 99999999 | XXXXXXXXXXXXXXXXXXXXXXXXXXXX | 9,999,999.99 | 9,999,999.99 |
| 99999999 | XXXXXXXXXXXXXXXXXXXXXXXXXXXX | 9,999,999.99 | 9,999,999.99 |
| 99999999 | XXXXXXXXXXXXXXXXXXXXXXXXXXXX | 9,999,999.99 | 9,999,999.99 |



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

Caselle Connect® > Accounts Receivable > Reports > Invoices

Caselle Connect® Modify Existing Customers Invoices

Title: Invoices - Splitter

Report Options Forms Print Settings

Form Options Form Print Settings

Output options: ☒ Print ☒ Save as ☐ Export ☐ Send to Document Management

Print Save As / Export

Save options

Save as type: PDF

File name: D:\MiViewPoint\ARInvToProcess\ARInvoices.pdf

Variables: {Counter} Insert variable

Export options

File name:

Variables: {Counter} Insert variable Field delimiter: ,



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

Caselle Connect® > Accounts Receivable > Reports > Invoices

Caselle Connect® Modify Existing Customers Invoices

Title: Invoices - Splitter

Report Options Forms Print Settings

Report dates

From: 08/26/2025

To: 08/26/2025

Advanced options...

Mailing date

08/26/2025

Advanced options...

☐ Include previously printed invoices

Selection criteria:

| Column | Value | Test |
|-----------------------------|-------|--------------|
| Customer.Customer number | All | Entire field |
| Customer.Name | All | Entire field |
| Customer Type.Customer type | All | Entire field |
| Invoice.Invoice number | All | Entire field |

Report order:

| Column | Sort | Title | Total | Page | Test |
|---------------|-----------|--------------------------|--------------------------|--------------------------|--------------|
| Customer.Name | Ascending | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Entire field |