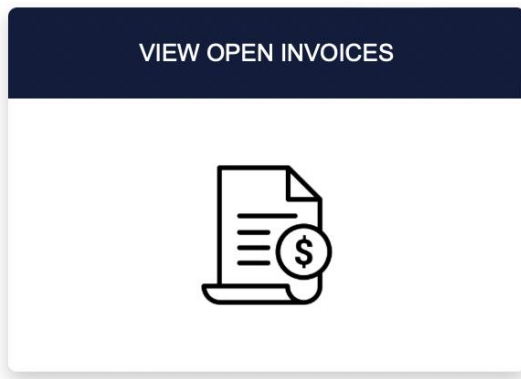


## View Open Invoices

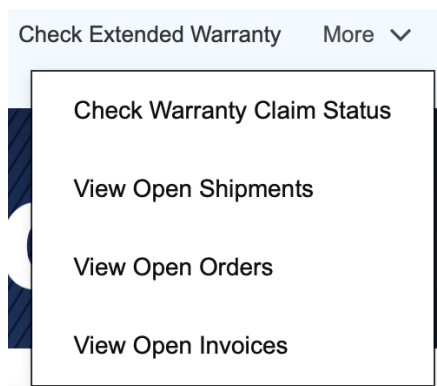
View Open Invoices report allows customers and agency representatives to view information on invoices for customers. This information includes invoice number, billing address, payment terms, and information on the materials that were ordered.

1. There are two methods to navigate to the View Open Invoices report:

From the ADP Inside home screen click on the “View Open Invoices” box.



Or click on the dropdown arrow on the navigation bar and select “View Open Invoices”.



2. Select the customer's name from the Customer box. If the person logged in is the customer, then there will be only one option. If the person logged in is an agency representative, then there will be multiple options.

### Select information to view Open Invoices

\* Customer

FERGUSON ENTERPRISES - 65275

Search

3. Enter the date range that you want to search for. The To Date can be no more than one year after the From Date.

\* From Date

Apr 26, 2022

\* To Date

Apr 26, 2023

4. Click on the "Search" button.

Search

5. A new window will appear with the Open Invoices report.

Search New Search

**FERGUSON ENTERPRISES - 65275**

Reset Filter ▼ Export Selected Invoice(s) to Excel View Selected Invoice(s) as PDF

Invoice Number ↑	Billing Date	Amount
<input type="checkbox"/> 563440554	Feb 02, 2023	\$254.46
<input type="checkbox"/> 563434767	Feb 02, 2023	\$3,234.00
<input type="checkbox"/> 563440175	Feb 03, 2023	\$3,234.00
<input type="checkbox"/> 563440713	Feb 03, 2023	\$254.46
<input type="checkbox"/> 563440673	Feb 03, 2023	\$4,688.82
<input type="checkbox"/> 563439221	Feb 02, 2023	\$4,688.82
<input type="checkbox"/> 563440297	Feb 16, 2023	\$181.61
<input type="checkbox"/> 563435448	Feb 03, 2023	\$3,234.00

6. Click on the checkbox next to each Open Invoice that you want to view.

Invoice Number ↑ ▼

---

563440554

563434767

563440175

563440713

563440673

563439221

563440297

7. Click on the “Export Selected Invoice(s) to Excel” button to download an Excel report of the open invoices.

[Export Selected Invoice\(s\) to Excel](#)

8. A CSV file will download to your device. The name of the file will be Open Invoice Data. It will contain information on the open invoices including billing information, shipping information, material description, and the amount of the invoice.


ADP Customer Invoice Report									
Date :	04/27/2023								
Sold-To	FERGUSON ENTERPRISES								
Invoice Number	Order Number	Billing Date	Ship to Zip	Ship to City	Ship to State	Sales Office Description	Line Item Number	MATERIAL DESCRIPTION	Amount
563434767	33953132	2/2/2023	22901-5713	CHARLOTTESVILLE	VA	Jeff Vietmeier	1	YE7J936E175B1605AP FW	\$3234.00
563440713	33953255	2/3/2023	66044-4324	LAWRENCE	KS	Jeff Vietmeier	1	KIT- CONCENTRIC VENT (4'7") 82M	\$254.46
563440673	33948690	2/3/2023	66044-4324	LAWRENCE	KS	Jeff Vietmeier	1	HE31124A140A0004AP	\$4688.82
563440297	33954974	2/16/2023		HAMPTON	VA	Jeff Vietmeier	2	MOTOR- BLOWER-3SPD-36BTUH-13SEER65915301	\$178.75
563440297	33954974	2/16/2023		HAMPTON	VA	Jeff Vietmeier	1	MOTOR-BLOWER-3SPD-24BTUH-13 SEER65915101	\$2.86

9. Click on the “View Selected Invoice(s) as PDF” button to download a PDF view of the Open Invoice reports.

[View Selected Invoice\(s\) as PDF](#)

10. A PDF file will download to your device. The file will be named Open Invoices. Each invoice that was selected in step 6 will have its own two-page invoice in the PDF file. These invoices include customer information, the terms and conditions, payment terms, freight terms, and material description, quantity, and price.

**INVOICE** Page 1/8



<b>Invoice Number</b>	: 563434767
<b>Invoice Date</b>	: Feb 02, 2023
<b>Customer Number</b>	: 65275
<b>Order Number</b>	: 33953132
<b>Customer PO</b>	: AUTOMATED 9098976338
<b>Ship Date</b>	: Feb 02, 2023
<b>Freight Terms</b>	: LTL Add Freight
<b>Payment Terms</b>	: 2 % 20 Days N30
<b>Sales Rep</b>	: Jeff Vietmeier

<b>Remit To:</b> Advanced Distributor Products LLC P.O. Box 731625 Dallas, TX 75373-1625	<b>Ship To:</b> Jones Company																					
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 5%;">Item</th> <th style="width: 40%;">Material &amp; Description</th> <th style="width: 10%;">Ord Qty</th> <th style="width: 10%;">Ship Qty</th> <th style="width: 10%;">Open Qty</th> <th style="width: 15%;">Net Price</th> <th style="width: 10%;">Amount</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1</td> <td>70555464 YE7J936E175B1605AP FW</td> <td style="text-align: center;">10</td> <td style="text-align: center;">8</td> <td style="text-align: center;">2</td> <td style="text-align: right;">\$404.25</td> <td style="text-align: right;">\$3,234.00</td> </tr> <tr> <td colspan="6"><b>Final Amount</b></td> <td style="text-align: right;"><b>\$3,234.00</b></td> </tr> </tbody> </table>		Item	Material & Description	Ord Qty	Ship Qty	Open Qty	Net Price	Amount	1	70555464 YE7J936E175B1605AP FW	10	8	2	\$404.25	\$3,234.00	<b>Final Amount</b>						<b>\$3,234.00</b>
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<b>Final Amount</b>						<b>\$3,234.00</b>																

**Note: Net price includes any applicable shipping, taxes, and surcharges**

## Filter Open Invoice Report

1. Click on the filter icon.



2. A pop up window will appear.

Use a filter to pare down your report results

\*Column you would like to filter by

Invoice Number

\*Select Criteria

Equals

\*Value

--Enter Search Value--

Apply Filter

Cancel

3. Select the arrows on the right to see the drop-down menu for Columns to filter by and criteria. Make your filter selections.

\*Column you would like to filter by

Invoice Number

✓ Invoice Number

Billing Date

Amount

\*Select Criteria

Equals

✓ Equals

Not Equals

Contains

4. Enter the value you want to filter by and select the “Apply Filter” button.

Use a filter to pare down your report results

---

\* Column you would like to filter by

Amount

\* Select Criteria

Equals

\* Value

31.78

---

Apply Filter Cancel

5. To clear the filter click on the “Reset Filter” button.

Reset Filter

## Error Messages

### *Incorrect information*

1. If the Customer Name and the date range do not return any results then you will receive the error message below.

**No Open Invoices were found for the values you entered. Please verify the information and try again.**

If you feel this message is an error, please contact ADP at [Support@adpnow.com](mailto:Support@adpnow.com)

a. To resolve this issue, select a different 12-month period to search for the order.

2. If the date range is insufficient, you will receive the error message below.

**The From date cannot be greater than the To date, and the date range cannot be longer than a year.**

a. To resolve this error, ensure that the dates are no more than 1 year apart and that the “To Date” is greater than the “From Date”.

### *Incorrect Selection*

On the report screen there are two options to view the individual reports in either Excel or PDF format.



Advanced Distributor Products®

1. If no boxes are checked when the “Export Selected Invoice(s) to Excel” or “View Selected Invoice(s) as PDF” button is clicked on, then you will receive the error below.



1. To resolve this error, select at least one report to view before clicking on either import button.