CDB Functions Performed by Normal Customer User

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Reports – Billing Summary

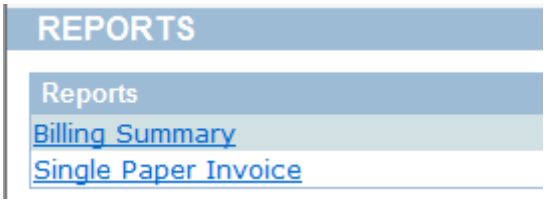
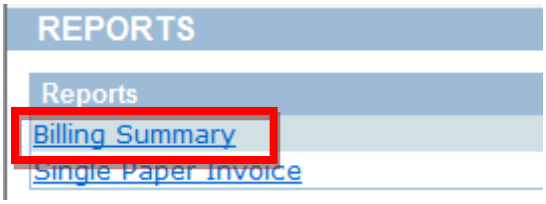
Contents of section

The tasks in the **Reports – Billing Summary** section include:

- How to view a Billing Summary report

Steps to view a Billing Summary report

The steps to view a Billing Summary report include:

Step	Action
1	From the **Home (DASHBOARD)** page click the **Reports** icon. **Result:** The **REPORTS** screen is displayed. 
2	From the left menu of the **REPORTS** screen, click **Billing Summary.** This is your detailed listing of charges for a bill cycle.  **Result:** The **Reports** screen with Billing Summary section is displayed on the next page.

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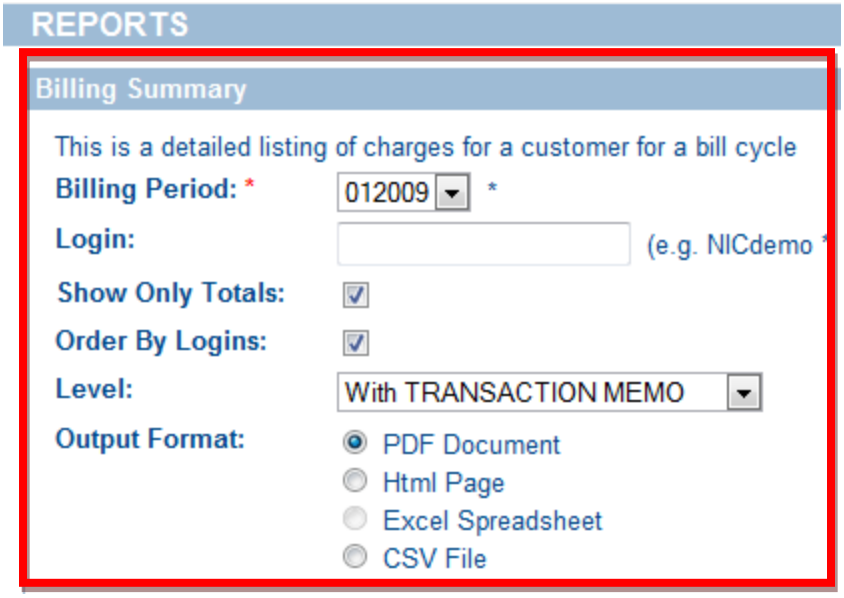
Steps to view a Billing Summary report (continued)

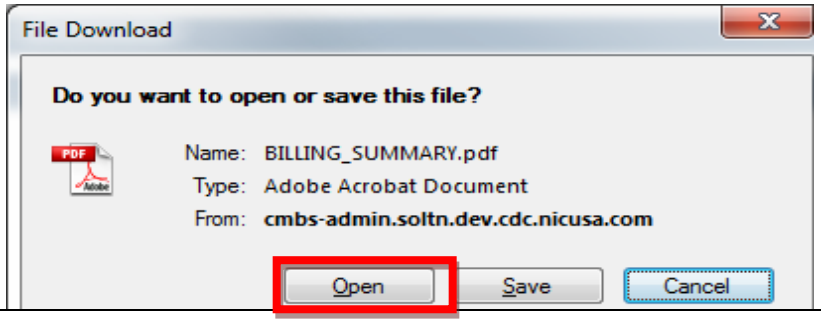
Step	Action
3	Click the **Billing Period** drop-down list and select the billing period date you would like the report generated for. You have the option to can enter a Login, click the Show Only Totals and Order By Logins check mark boxes, select With or Without TRANSACTION MEMO to have additional information added to the report. You can select an Output Format (PDF Document, Html Page, Excel Spreadsheet, or CSV File). 
4	In the lower right corner, click **Generate.** **Result:** The **File Download** window is displayed on the next page.

Continued on next page

Reports – Billing Summary, Continued

Steps to view a Billing Summary report (continued)

Step	Action
5	Click **Open.** You can click Save if you would like to save a copy to your desktop or another location.



Sample Billing Summary report

Result: The **Billing Summary** report is displayed below.

Account Summary for 1245		
Advanced Towing Svc. Inc.		
P.O. Box 143	Current Balance:	As Of 012009
W. Jordan UT 84084	$0.00	$26.00

Payment Id	Payment Date	Payment Amount	Check Ref	Description
157748	01/10/2009	$(20.00)	CDB_14175	Credit Card
	Total	$(20.00)		

Credit/Debit Memo Id	Memo Type	Memo Date	Amount
		Total	$0.00

Login	Description	Quantity	Cost
colbyruss	Titles and Liens	13	$26.00
	Total for Login	13	$26.00
	Total for Customer	13	$26.00

Description	Quantity	Cost
Titles and Liens	13	$26.00
	13	$26.00

Reports – Single Paper Invoice

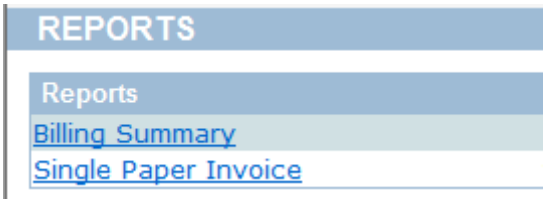
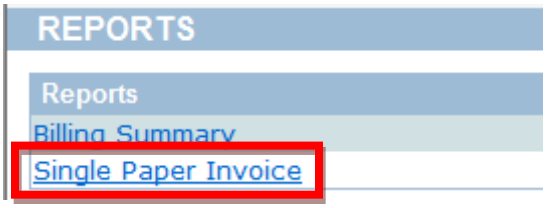
Contents of section

The tasks in the **Reports – Single Paper Invoice** section include:

- How to view a Single Paper Invoice report

Steps to view a Single Paper Invoice report

The steps to view a Single Paper Invoice report include:

Step	Action
1	From the **Home (DASHBOARD)** page click the **Reports** icon. **Result:** The **REPORTS** screen is displayed. 
2	From the left menu of the **REPORTS** screen, click **Single Paper Invoice.** This is your invoice for the bill cycle provided.  **Result:** The **Reports** screen with Single Paper Invoice section is displayed on the next page.

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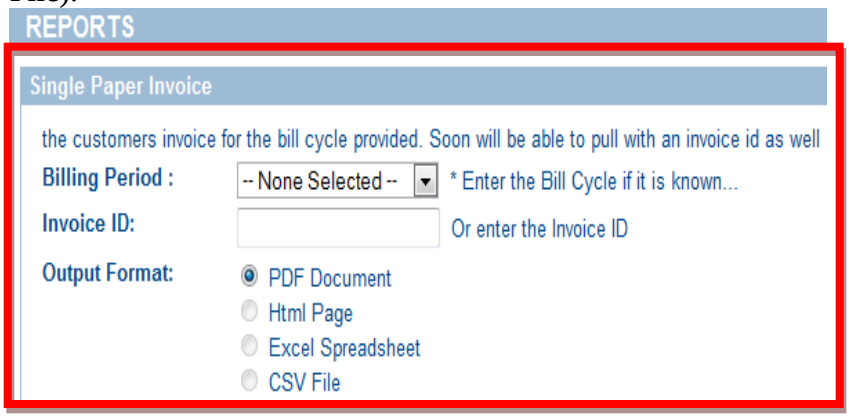
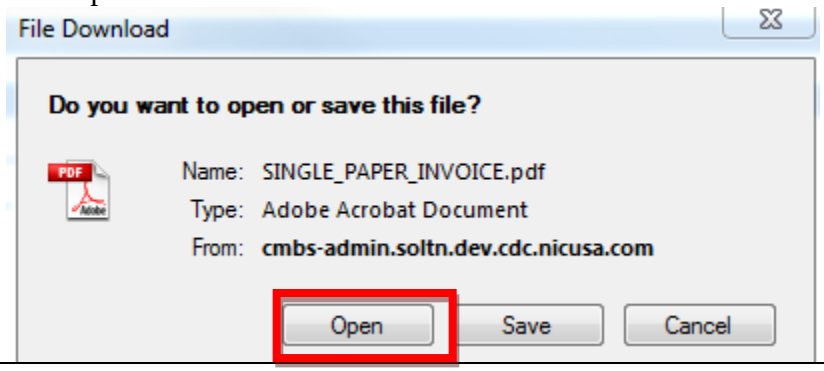
Steps to view a Single Paper Invoice report (continued)

Step	Action
3	Click the **Billing Period** drop-down list and select the billing period date you would like the report generated for. You have the option to can enter a Invoice ID. You can select an Output Format (PDF Document, Html Page, Excel Spreadsheet, or CSV File). 
4	In the lower right corner, click **Generate.**
5	**Result:** The **File Download** window is displayed. Click **Open.** You can click Save if you would like to save a copy to your desktop or another location. 

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