

Billing at a Glance

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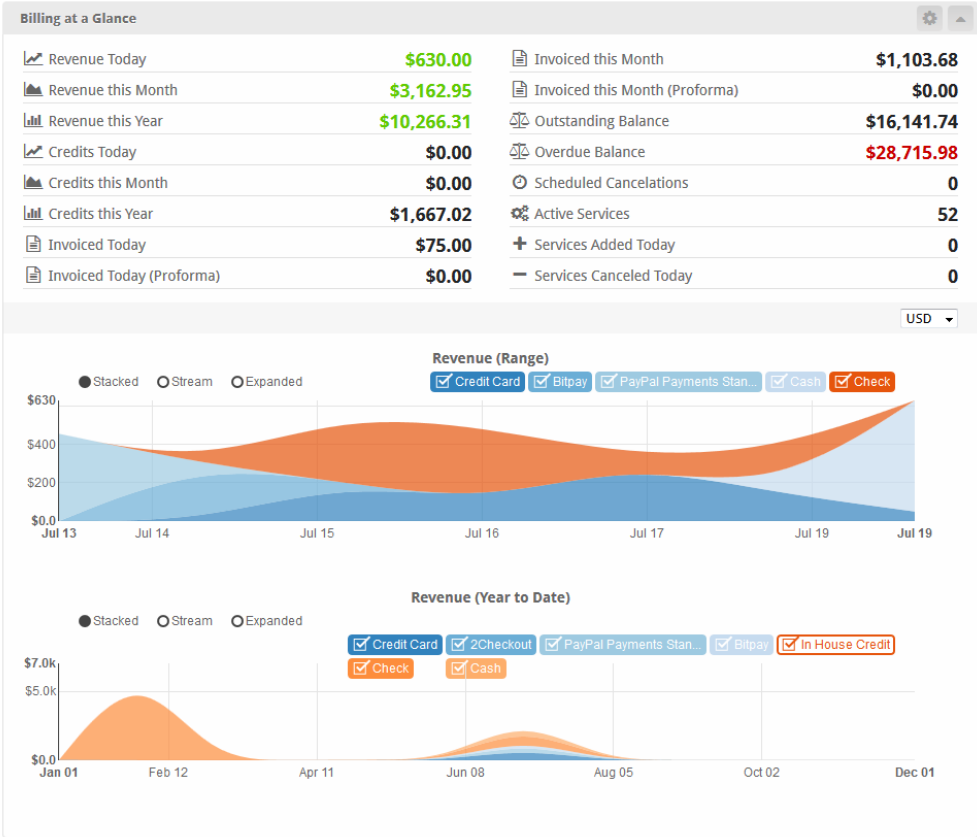
The [Billing at a Glance](#) widget is installed by default for the primary staff user, but may need to be installed for additional staff or for add-on companies.

Installing Billing at a Glance

1. Visit [Settings] > [Company] > [Plugins] > Available.
2. Click the "Install" button within the Billing at a Glance plugin listing.
3. To enable the widget, go to [Billing] > [Overview], click the "Manage Widgets" link, and drag the widget from the right side, to the left.

The Widget

Once installed and enabled, the widget will look something like this:



Changing What is Displayed

To edit what is displayed within the widget, click the cog/gear icon in the upper right window decorations and make your changes. When finished, click the "Update Settings" button in the bottom right to save your changes and return to the Billing Overview.

Billing at a Glance

Statistics

Check the options that will appear on the Billing Overview.

☒ Revenue Today
☒ Revenue this Month
☒ Revenue this Year
☒ Credits Today
☒ Credits this Month
☒ Credits this Year
☒ Invoiced Today
☒ Invoiced Today (Proforma)
☒ Invoiced this Month
☒ Invoiced this Month (Proforma)
☒ Outstanding Balance
☒ Overdue Balance
☒ Scheduled Cancelations
☒ Active Services
☒ Services Added Today
☒ Services Canceled Today

Graphs

Check which graphs should appear on the Billing Overview.

☒ Revenue Graph (Range)
☒ Revenue Graph (Year to Date)
☐ Amount Invoiced Graph

Graph Settings

Manage the graph settings for the graphs that will appear on the Billing Overview.

☒ Show Legend on Graphs

Graph Date Range

7 days

Return to Overview

Update Settings

Statistics

A list of the different available statistics and what each one calculates

Name	Description
Revenue Today	The total amount from all approved non-credit transactions received in this calendar day
Revenue this Month	The total amount from all approved non-credit transactions received in this calendar month
Revenue this Year	The total amount from all approved non-credit transactions received in this calendar year
Credits Today	The total amount from all approved credit transactions received in this calendar day
Credits this Month	The total amount from all approved credit transactions received in this calendar month
Credits this Year	The total amount from all approved credit transactions received in this calendar year
Invoiced Today	The total amount from all open full invoices billed in this calendar day
Invoiced Today (Proforma)	The total amount from all open proforma invoices billed in this calendar day
Invoiced this Month	The total amount from all open full invoices billed in this calendar month
Invoiced this Month (Proforma)	The total amount from all open proforma invoices billed in this calendar month
Outstanding Balance	The total amount of all unpaid full invoices billed today or before
Overdue Balance	The total amount of all unpaid full and proforma invoices with due dates that have passed
Scheduled Cancelations	The total number of active services with a cancelation date in the future

Active Services	The total number of active services
Services Added Today	The total number of services that were created in this calendar day (not only active services, but any that were created)
Services Canceled Today	The total number of services that were canceled in this calendar day