

Monthly Receivables Report

This article applies to:

The **Monthly Receivables** Report is a summary of orders with payments due for each month. This report helps you monitor money owed to you by others. Note: This report has features which require the paging to be fixed to 1000 line items per page.

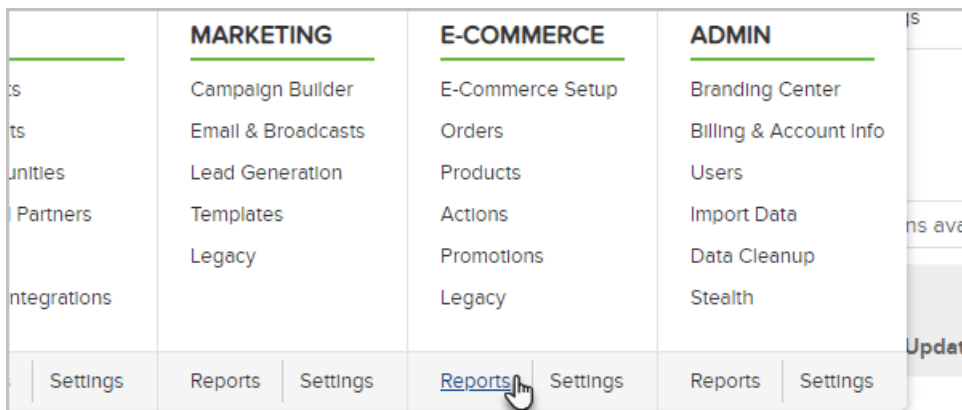
Pro-Tips!

In Max Classic, sales totals represent gross sales. In order to see net sales, you will need to export a sales totals report along with the credits issues report.

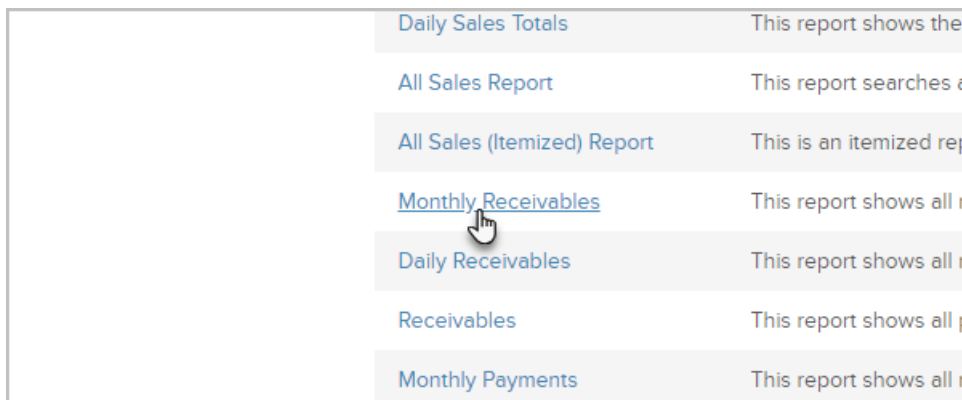
The credits issued report will contain any manual credits you have recorded along with any refunds you have made through Max Classic. If you issue a refund or credit outside of Max Classic, be sure to record this in Max Classic if you are using Max Classic for bookkeeping purposes.

How to locate Monthly Receivables

1. Go to E-Commerce > Reports



2. Click **Monthly Receivables**



Criteria Search

- **Num pmts:** The number of payments due

Monthly Receivables

Actions ▾ New Search Edit Criteria/Columns... Save... Print...

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Num pmts	Start date	Products
44	2/1/2019	Party Cherry Craz; Opportunity Product; Strawberry Lemonade
50	3/1/2019	Party Cherry Craz; Downpayment; Strawberry Lemonade
46	4/1/2019	Party Cherry Craz; Strawberry Lemonade
47	5/1/2019	Party Cherry Craz; Strawberry Lemonade

- **Amt due:** The total amount due

Amt due	year	month
\$1,986.00	2019	2
\$3,670.00	2019	3
\$1,600.00	2019	4
\$1,635.00	2019	5
\$1,600.00	2019	6
\$1,670.00	2019	7

Click on **Show Details** to view a list of the individual orders included in these totals. Clicking **Show Details** from the **Details** columns will redirect you to the **Receivables** report.

Edit Criteria/Columns... Save... Print... No options available ▾

1000 per page ⓘ

Start date	Amt due	year	month	Details	Date
2019	\$1,986.00	2019	2	Show Details	February 2019
2019	\$3,670.00	2019	3	Show Details	March 2019
2019	\$1,600.00	2019	4	Show Details	April 2019
2019	\$1,635.00	2019	5	Show Details	May 2019
2019	\$1,600.00	2019	6	Show Details	June 2019

Click on a specific month from the **Date** column to view a summary of daily receivables by redirecting to the **Daily Receivables**.

bles

Edit Criteria/Columns... Save... Print... No options available

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Amt due	year	month	Lead Source	Details	Date
\$1,986.00	2019	2	stupid	Show Details	February 2019
\$3,670.00	2019	3	stupid	Show Details	March 2019
\$1,600.00	2019	4	stupid	Show Details	April 2019
\$1,635.00	2019	5	stupid	Show Details	May 2019

Customized your report summary

1. Click the **Search** button (if available)

Monthly Receivables

Actions ▾ New Search Edit Criteria/Columns... Save... Pr

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Num pmts	Amt due	Products
1	\$5.00	

2. Click on the **Columns** tab

Monthly Receivables

Misc Criteria **Columns**

Lead Source contains any ▾

Type to search...

year contains any ▾

3. From the **Available Fields** selection box, hold down **CTRL** on your keyboard and select the fields you would like to add the report

6. Note that you can reset your search criteria by either clicking **New Search** or **Reset Filters**.

Monthly Receivables

Actions ▾ **New Search** Edit Criteria/Columns... Save... Print...

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Num pmts	Amt due	Products	month
6	\$225.00	Deleted product (ID: 145); Weekly Pool Checkup	10

8 Online
6-pack 9 Offline
10
11 OK Cancel **Reset Filters**
(ID: 152) 11
2 https://martyc.infusionsoft.com/Reports/searchTemplate.jsp?reportClass=MonthlyReceivables
2 2/6/2018 2018 0 0 Off