

## INVOICE EMAIL CAUSING MAJOR ISSUES WITH CUSTOMERS

Client has expressed issues with the Invoice email that is sent out to customers. *It is causing so much confusion with the customers that she is considering leaving Quickbooks* because this has been mentioned on multiple forums in Quickbooks, but has not been addressed since the change earlier in the year. Please, let's find a remedy before we lose a really great client that's really trending towards major growth. While this example is small dollar, there are multiple high dollar invoices with the same scenario causing a substantial frustration for all.

Here is the first synopsis of the problem:

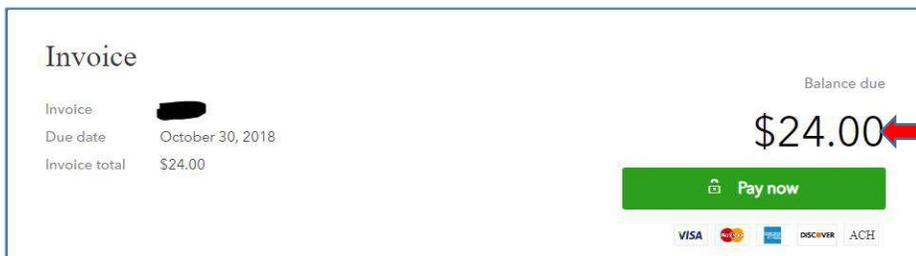
1. A customer has multiple invoices outstanding (some overdue).

DATE	TYPE	NO.	DUE DATE	BALANCE	TOTAL	STATUS	ACTION
10/01/2018	Invoice	[REDACTED]	10/30/2018	\$24.00	\$24.00	Open (Sent)	<a href="#">Receive payment</a> ▼
09/01/2018	Invoice	[REDACTED]	09/30/2018	\$20.00	\$20.00	Overdue (Viewed)	<a href="#">Receive payment</a> ▼
08/01/2018	Invoice	[REDACTED]	08/30/2018	\$69.00	\$69.00	Overdue (Updated)	<a href="#">Receive payment</a> ▼

2. The current invoice due is \$24. However, altogether the balance due on the account is \$113.
3. After opening the latest invoice and hitting Save & Send, a review of the invoice shows the total balance due on the account is at the top of the invoice and over the button to "Review and Pay."



4. The invoice is sent to the customer and the customer WANTS to pay the entire amount seeing in the detail that he has a balance forward. He clicks on the "Review and Pay" button. But, when he gets to the screen, the amount to pay is \$24.00 – ONLY the current amount due even though the detail still shows a total of \$113.00.



DATE	ACCOUNT SUMMARY	AMOUNT
09/01/2018	Balance Forward	89.00
	Payments and credits between 09/01/2018 and 10/01/2018	0.00
	New charges (details below)	24.00
	Total Amount Due	113.00

ACTIVITY	QTY	RATE	AMOUNT
	6	4.00	24.00
TOTAL OF NEW CHARGES			24.00
TOTAL DUE			<b>USD 113.00</b>

5. He continues by clicking the “Pay Now” button. Here he can actually CHANGE and type in the amount of \$113.00 – BUT, if he does the system is now calculating that he will have a credit of \$89.00. Some customers do not realize they can change the amount and only pay the current due when they are WILLING and READY to pay overdue amounts. Others get confused by the credit description and don’t want to overpay. Overdue amounts are starting to increase, call volume from customers being confused on the amount they are supposed to pay and actually paying are causing unproductivity and aggravation, and clients are not happy with the change causing these disturbances without an option to customize the invoice email.

### Payment amount

\$ 113.00

Remaining balance \$0.00

Credit +\$89.00

### **\*\*Suggestions:**

- Add the wording at the top of the invoice to say Full Balance Due or Account Balance Due to stipulate the amount in the box is for every invoice outstanding.
- Show customer a detailed listing of all the invoices they can pay for, maybe a selection bubble next to each invoice number, and the total calculated based on the invoices they choose to pay.
- When the customer clicks on “Pay Now” show the total balance amount and specify the invoices they are paying for – not the extra amount over the current invoice as a credit.