Knowledge Base Article

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Article ID: **4242**
Subject: **How to Set Agent Default Invoice Template Items for Account Receivables**
Last Modified: **February 10, 2009**

Applies to: **Pro Gold i2 2.xx, 3.xx**

Summary: Agent Receivables (invoicing) can be maintained and billed in Pro Gold. While items can be added to the agents' invoices as changes arise, default or recurring charges can be set up to automatically be added when invoices are created. This typically happens when agents are regularly billed for monthly charges.

Procedure: Actions required to setup the agent default invoice template are explained below.

Step 1: Log into Pro Gold.
Step 2: In the Properties Tab, select the "**Agent Information"** icon.
Step 3: Use the "**Find**" button at the bottom of the screen to locate and select a particular agent.
Step 4: Select the **Template Tab** at the top of the screen.
  a. 2.xx Users: Select the Invoice Template Tab.
Step 5: In the "**Invoice Line Item Description**" field, enter the name of the charge.
Step 6: Use the "**Account**" dropdown to select the appropriate General Ledger account for the charge.
  a. Pro Gold automatically fills the "Account" dropdown with a default account number. To change the default account number, go to the **Setup Tab** and select the **Change Company Info** option. Select the "**Default 2**" tab and change the account selected for the "**Invoice Credit Account**" field.
  b. A General Ledger account must be selected for invoice items. This account can be changed as the invoices are created, so select an account that would be used most frequently for invoice charges.
Step 7: Enter the "**Amount**" that will be charged for the item.
  a. If a there is not a regular amount for the invoice item, then enter 0 and the correct amount can be entered after invoices are created.
Step 8: Check the "**Taxable**" checkbox if the invoice item is taxable. By default the box is unchecked.
Step 9: As lines in the template are used, new lines are added to the bottom of the list. Add as many template charges as desired.
Step 10: Click the "**Save Agent**" button at the bottom of the screen to save the changes.
Step 11: Click the "**Done**" button to close the Agent Information screen.

Additional Information: Below is a link you can use to access Enhancement HelpNet Center resources, which includes the Knowledge Base Article (KBA) Library, Pro Gold i2 Documentation, and Training Webcasts:

http://secured.progoldi2.com/webcast.aspx

- The Enhancement HelpNet links are located on the right side of the web page.

Related articles: N/A

Keywords: Invoice Template, Agent Receivable, Default Charges, A/R, Setup Defaults, 4242

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