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# Checkout User Guide

Spring 2020





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# CHAPTER 1: Checkout Overview

## What is Checkout?

Checkout is Salesforce's self-service e-commerce portal, where customers can view and accept published quotes, purchase new and add-on licenses, and view historical details. You can perform the following actions within Checkout:

- View and manage your quotes, or create a quote to purchase additional seats
- Place orders
- View installed products and their related orders and contracts
- View and print Salesforce statements
- View and manage invoices for your organization
- Email your Salesforce account contact
- Change billing addresses
- Change credit card information
- Log a case for any Checkout issue or concern
- Request assistance with Checkout



**Note:** Checkout is only available for Sales or Service cloud trials and active orgs.

## How can I access Checkout?

There are several ways to access Checkout: jump directly from a link in an email, bookmark, etc. (you will be asked to login with your Salesforce credentials); click the "Subscribe now" button from a trial; select "Checkout" from the App drop-down menu of your Salesforce org (not available in Salesforce Lightning Experience); or click the "Checkout" button in Setup.

If your Account Executive has recently published a quote for your review, upon logging in using the Checkout link from the App Menu, you will be taken directly to the quote, or if multiple quotes are published, you will be taken to the Quotes tab.



**Note:** The following users can log into Checkout: users with the "Manage Billing" permission enabled in their profile or in a permission set; users with the Checkout enabled permission selected on their user record (this permission can only be set with administrators with both Manage Billing and Manage Users permissions).

# CHAPTER 2: Activating Trials

## How can I activate my Salesforce trial?

When you log into Checkout from a trial org for the first time, you will be presented with the editions and clouds available for purchase.

[SALES CLOUD](#) [SERVICE CLOUD](#)

### Get the world's #1 sales application

Improve sales productivity, boost your win rates, and grow your revenue. Have questions?  
Call 1-800-NO-SOFTWARE.

#### SalesforceIQ Starter

Out-of-the-box CRM for up to 5 users

**25 USD**  
/ user / month

New Trial

- Effortless setup
- Automatic data capture
- Intelligent follow-up reminders
- Personalized sales tracking
- Shared address book
- Mobile apps
- Webinars and live trainings

#### Professional

Complete CRM for any size team

**65 USD**  
/ user / month\*

New Trial

- Account and contact management
- Opportunity tracking
- Lead management
- Task and event tracking
- Customizable reports and dashboards
- Mobile access and administration
- Chatter – company social network
- Outlook Side Panel and sync
- Role permissions
- Case management
- Campaigns\*\*
- Quotes and orders\*\*
- Collaborative forecasts\*\*
- Mass email\*\*
- Sales Data\*\*\*
- Sales Cloud Engage\*\*\*

#### Enterprise

Deeply customizable CRM for your business

**125 USD**  
/ user / month\*

Buy Now

Get all Professional features PLUS

- Workflow automation
- Enterprise territory management
- Profiles and page layouts
- Custom app development
- Integration via web service API
- Salesforce Identity
- Salesforce Private AppExchange
- Report history tracking\*\*
- Approval automation\*\*
- Sales Data\*\*\*
- Sales Cloud Engage\*\*\*

[Download the full edition comparison chart](#)

\* All per user products require an annual contract.  
\*\* Only available in Salesforce Classic.  
\*\*\* Available for an additional cost.

Once you have selected an edition, you will need to enter a quantity.

[SALES CLOUD](#) [SERVICE CLOUD](#)

### Get the world's #1 sales application

Improve sales productivity, boost your win rates, and grow your revenue. Have questions?  
Call 1-800-NO-SOFTWARE.

#### Enterprise

Deeply customizable CRM for your business

**125 USD**  
/ user / month\*

Quantity:

1

Proceed to Place Order

[Show all available products](#)

After entering your quantity and clicking Next, there will a brief wait as your cart is configured. You will then be presented with the Place Order screen.

From the Place Order page, you can perform the following: confirm your cart has the correct product and quantity; click Edit Cart if you wish to change the product and quantity; confirm your Billing Address and Contact info; enter valid credit card details; access, read and agree to the Master Service Agreement, or MSA.

Quote: Q-00289856

**1 Selected Products** Total: USD 1,500.00 Plus applicable taxes

Subscriptions in this order will Start on 3/2/2016 and Renew on 3/1/2017

**Recurring Products**

Product	Quantity	Order Term (Months)	Monthly/Unit Price	Sales Price
Sales Cloud - Enterprise Edition	1	12	USD 125.00	USD 1,500.00
			Subtotal Charges	USD 1,500.00
			Total Charges	USD 1,500.00 (Plus applicable taxes)

\*\*The Monthly/Unit Price shown above has been rounded to two decimal places for display purposes. As many as eight decimal places may be present in the actual price. The totals for this order were calculated using the actual price, rather than the Monthly/Unit Price displayed above, and are the true and binding totals for this order.

\*If this Order Form is executed and/or returned to salesforce.com by Customer after the Order Start Date above, salesforce.com may adjust these terms, without increasing the Total Price, based on the date salesforce.com activates the products above. Following activation, any adjustments to these terms may be confirmed by logging into Checkout, by reference to the order confirmation email sent by salesforce.com to the Billing Email Address above, and/or by contacting Customer Service.

Prices shown above do not include any taxes that may apply. Any such taxes are the responsibility of Customer. This is not an invoice.

[Next](#) [Edit Cart](#)

**2 Contact Information** 1 Market St San Francisco CA 94105

**3 Payment**

**4 Terms and Agreements**

Quote: Q-00289856

**1 Selected Products** Total: USD 1,500.00 Plus applicable taxes

**2 Contact Information** 1 Market St San Francisco CA 94105

**Billing Address**

Street \*

City \*

State \*

Zip \*

Country \*

**Shipping Address**

☒ Same as billing

**Contact Information**

Billing Company Name

First Name \*

Last Name \*

Contact Email \*

Billing Phone \*

Billing Language \*

Billing Method

Billing Frequency

[Next](#)

**3 Payment**

**4 Terms and Agreements**

**3 Payment**

Card Number \*

Expiration Date \*  /

Security Code \*

First Name \*

Last Name \*

Contact Email \*

Street \*

City \*

State \*

Zip \*

By clicking the submit button below, I agree that my personal information, including payment information, may be transferred outside the country where I am located for processing purposes. For additional information about salesforce.com's privacy practices, please see <https://www.salesforce.com/company/privacy.jsp>

[Submit](#)

Once you activate your org, full Checkout functionality becomes available.

## CHAPTER 3: Full Checkout Experience

### What is the full Checkout experience?

Active customers have access to more options in Checkout, including the ability to add products onto their contract, review quotes, orders, invoices, and other details, and manage billing details on their contracts.

When you log into Checkout from an active org, you may land on either of the following pages:

1. If a single quote is active, either a quote you have created via self-service, or a quote your AE has published, you may land on the quote detail page, where you can proceed to accept the quote
2. If multiple active quotes are available, you may land on the quote list page
3. If no active quotes are available, you will land on the Home Page

The screenshot shows the Salesforce Checkout Home page. At the top, it says "SALES CLOUD" and "SERVICE CLOUD". Below that is a header "Get the world's #1 sales application" with a sub-header "Improve sales productivity, boost your win rates, and grow your revenue. Have questions? Call 1-800-NO-SOFTWARE." The main content is divided into three columns representing different pricing tiers:

- SalesforceIQ Starter**: Out-of-the-box CRM for up to 5 users. Price: 25 USD / user / month. Button: New Trial.
- Professional**: Complete CRM for any size team. Price: 65 USD / user / month\*. Button: New Trial.
- Enterprise**: Deeply customizable CRM for your business. Price: 125 USD / user / month\*. Button: Buy Now.

Below each tier is a list of features. The Enterprise tier also includes a section for "Get all Professional Features PLUS" with additional features like Workflow automation, Enterprise territory management, and more.

At the bottom, there is a link to "Download the full edition comparison chart" and footnotes: "\* All per user products require an annual contract.", "\*\* Only available in Salesforce Classic.", and "\*\*\* Available for an additional cost."


From the Home page, you have several options:

- Add More Products
- Contacts Sales Assistance to Upgrade or Renew Your Account
- Change Contract Billing Address
- Contact the Billing Department

The screenshot shows the Checkout Home page. At the top, it says "Checkout Home". Below that is a sub-header "Checkout gives you an easy way to manage all your salesforce.com orders, inquiries, purchases, and contracts. Here you'll find links to resources that will help you get even greater value from your Salesforce deployment." The main content is divided into two columns:

- Buy More**:
  - Add More Products
  - Contact Sales Assistance to Upgrade or Renew Your Account
- Account Management**:
  - Change Contract Billing Address
  - Contact the Billing Department

## Adding more products

 **Important:** Please note that not all customers will be able to self-service their own add-ons, depending on how many contracts you have and other factors.

When you click “Add More Products”, you will be presented with the add-on quoting interface. The first screen brings up a list of products you currently own.

If you want to add more licenses, simply adjust the quantity field. Please note that final pricing will be calculated when you click “Add to cart”, including any discounts if applicable.

Check on “All available products” to see a list of common products available to add onto your contract.

Quote: Q-00289552

Contract 01166714 - Subscriptions in this order will Start on 3/7/2016 and Renew on 2/28/2017

Your Installed Products	Installed Quantity	List Price	Additional Quantity
Sales Cloud - Enterprise Edition	5	USD 125.00	<input type="text" value="0"/>

Platform Licenses	Quantity
Force.com - Enterprise Edition	<input type="text" value="0"/>
Service Cloud - Enterprise Edition	<input type="text" value="0"/>


Feature Licenses	Quantity
Additional API Calls - 10,000 per day	<input type="text" value="0"/>
Analytics Cloud - Builder	<input type="text" value="0"/>
Data Storage (500MB)	<input type="text" value="0"/>
File Storage (10GB)	<input type="text" value="0"/>
Knowledge	<input type="text" value="0"/>
Mobile	<input type="text" value="0"/>

Support Licenses	
Standard Support	<input checked="" type="radio"/>
Premier Success Plan (Support)	<input type="radio"/>
Premier+ Success Plan (Support & Admin)	<input type="radio"/>

Sandbox	Quantity
Sandbox (Developer Pro)	<input type="text" value="0"/>
Sandbox (Full Copy)	<input type="text" value="0"/>

[Add to cart](#)

Depending on the edition of your org, these products will vary, but often consist of additional storage, API calls, support options, and sandboxes.

 **Note:** Please note that pricing for Premier Support and sandboxes is derived from the overall value of the total licenses you own, and as such pricing will only be calculated when you click “Add to cart”.

When your cart has been configured you will be sent to the Place Order page.

If the payment method on your contract is credit card or direct debit, you will be presented with a page where you can confirm your cart, billing details, and payment details, before agreeing to the MSA and placing your order.



Contract 01166714 - Subscriptions in this order will Start on 3/7/2016 and Renew on 2/28/2017

\*\*\*The Monthly/Unit Price shown above has been rounded to two decimal places for display purposes. As many as eight decimal places may be present in the actual price. The totals for this order were calculated using the actual price, rather than the Monthly/Unit Price displayed above, and are the true and binding totals for this order.

If this Order Form is executed and/or returned to [salesforce.com](https://www.salesforce.com) by Customer after the Order Start Date above, [salesforce.com](https://www.salesforce.com) may adjust these terms, without increasing the Total Price, based on the date [salesforce.com](https://www.salesforce.com) activates the products above. Following activation, any adjustments to these terms may be confirmed by logging into Checkout, by reference to the order confirmation email sent by [salesforce.com](https://www.salesforce.com) to the Billing Email Address above, and/or by contacting Customer Service.

Prices shown above do not include any taxes that may apply. Any such taxes are the responsibility of Customer. This is not an invoice.

**Sign with DocuSign**

[Edit Cart](#)[illegible]

Log a Case

Topic

Purchasing

Subject

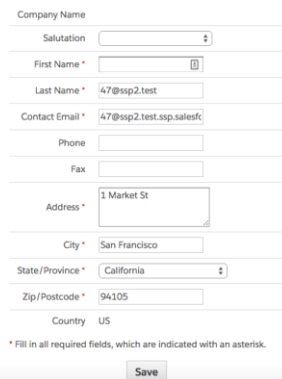
Description

Submit

To change the billing information associated to your contract, select Change Contract Billing Address.

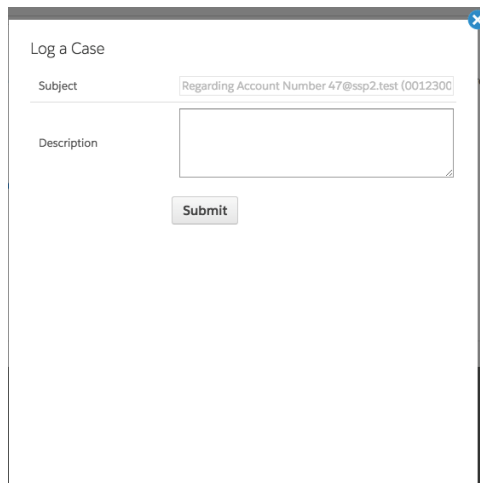
Contract: 01166739

Billing Address and Contact Information



A form titled "Billing Address and Contact Information" with the following fields: Company Name (text), Salutation (dropdown), First Name (text, required), Last Name (text, required), Contact Email (text, required), Phone (text), Fax (text), Address (text, required), City (text, required), State/Province (dropdown, required), Zip/Postcode (text, required), and Country (text, required). A "Save" button is at the bottom. A note at the bottom states: "\* Fill in all required fields, which are indicated with an asterisk."


To contact the Billing Department, select Contact Billing. This link launches a case form, which you can use to inquire about invoices, payments, statements, etc.



A "Log a Case" form with the following fields: Subject (text, pre-filled with "Regarding Account Number 47@ssp2.test (0012300)"), Description (text area), and a "Submit" button. The form is displayed in a window with a close button in the top right corner.

## Quotes Tab

Quotes are a convenient way to estimate prices for products before placing an order. In Checkout, you have the ability to create multiple quotes to compare pricing and features by creating multiple quotes using edition packages and quantities.

 **Important:** Quotes are valid until the end of the calendar month in which the quote was created.

Clicking the Add More Products link will either launch the editions selection screen if your Salesforce org is not yet activated, or the add-on experience if your org is currently active. See above for details on both.

The Quote home page lists all quotes created by users in your organization. From this page, you can:

- Filter the list to show certain quotes, such as saved quotes and completed quotes

- View the actions you can complete per quote, quote number, who the quote was created by, status of the quote, the expiration date of the quote, quote amount, and contract number

In the Actions column, you can:

- **Checkout** – Click to begin the process of placing an order based on a quote
- **Delete** – Click to remove a quote from the list. You can only delete active quotes that you have created in Checkout
- **View** – Click to view completed quotes, or click to begin the process of accepting a quote requiring e-signature

In the Quote Number column, click on a quote number to view the quote details

Quotes


View: All ⌵ Add More Products

Actions	Quote Number	Created By	Status	Expires On	Accepted By	Quote Amount	Contract Number
Delete   Checkout	<a href="#">Q-00289845</a>	47@ssp2.test 47@ssp2.test	Draft	3/31/2016		USD 0.00	<a href="#">01166739</a>

<< < 1 > >>

On the Quote Order Details, you can view:

- Contract number
- The date the subscription to the order will begin
- The date the subscription will renew
- Installed Products
- Installed quantity
- List Price
- View all products

 **Important:** You can increment on additional products if your org is active.

If your org is active, you can click on the Contract Number link to open the Contract page

Quote: [Q-00289845](#)

Contract 01166739 - Subscriptions in this order will Start on 3/2/2016 and Renew on 2/28/2017

Your Installed Products	Installed Quantity	List Price	Additional Quantity
Sales Cloud - Enterprise Edition	5	USD 125.00	<input type="text" value="0"/>

Show all available products

[Add to cart](#)

## Contracts Tab

Contracts determine how you are billed and contain the terms and conditions for your Salesforce account. For example, your payment method and billing address are specified in your contract. Your organization may have one contract for all your orders, or multiple contracts.

Click on the Contracts tab to view the Contracts page. From this page, you can:

- View a list of all your organization's contracts, including each contract's number, billing last name, start date, end date, status, and payment method.
- Click a contract number to view contract details, change your billing address, or change your credit card information.
- Click a column heading to sort the list in ascending order. Click the heading a second time to sort in descending order.

## Contracts

Contract Number	Billing Last Name	Contract Start Date	Contract End Date	Status	Payment Method
01166739	47@ssp2.test	2/29/2016	2/28/2017	Activated	Check

<< < 1 > >>

On the Contract details page, you can:

- Add more products if your org is active
- Change your billing address
  - If your payment method is Credit Card, your billing address must match the address on your credit card
- Log a case if you have issues or concerns
- View the contract, billing, and shipping details
- View the contract special terms and purchase and pricing conditions, if applicable
- View the list of orders placed under this contract

Contract: 01166739

### Contract Detail

[Add More Products](#) | [Change Billing Address](#) | [Log a Case](#)

Contract Number	01166739	Billing Name	47@ssp2.test
Status	Activated	Billing Company Name	
Contract Start Date	2/29/2016	Billing Language	English
Contract End Date	2/28/2017	Billing Address	1 Market St San Francisco, CA 94105 US
Payment Terms	Net 30	Shipping Address	1 Market St San Francisco, CA 94105 US
Payment Method	Check		
Billing Frequency	12.0		

### Orders

Order Number	Status	Order Start Date	Order End Date	Amount
06857500	Provisioned	2/29/2016	2/28/2017	USD 7,500.00

<< < 1 > >>

- Click on an order number to view details for a particular order
  - Once you click on the order number, you can view the Order details of the respective contract selected

Order: 06857500

### Order Detail

[Log a Case](#)

Account Name	47@ssp2.test	Order Type	Initial
Contract Number	01166739	Order Start Date	2/29/2016
Contract End Date	2/28/2017	Order End Date	2/28/2017
Status	Provisioned		

Product Name	Quantity	Monthly/Unit Price	Total Amount
Sales Cloud - Enterprise Edition	5.00	USD 125.00	USD 7,500.00

<< < 1 > >>

## Contract Details

### Field

### Description

Contract End Date	Last day the contract is active.
Contract Number	Unique number automatically assigned to the contract.
Contract Start Date	First day that the contract is active.
Status	The stage the contract has reached in the contract business process.

## Billing Information

Field	Description
Billing Address	Address associated with billing for this contract.
Billing Company Name	Company name for this contract.
Billing Frequency	Periodic billing interval.
Billing Language	Default language.
Billing Name	Billing contact name.
Payment Information	Payment details such as name, last four digits of the credit card used, credit card type, and more.
Payment Method	How invoices are paid.
Payment Terms	Payment terms for this contract.
Shipping Address	Address where products are sent.

## Orders Tab

The Orders home page shows all orders placed by Checkout users within your organization. An order is a transaction indicating that you have agreed to purchase specific products and services from Salesforce. Each order is associated with one contract, which determines the terms for the order.

Click on the Orders tab to view the Orders page. From this page, you can:

- Click an order number to view the order's details.
- Click a contract number to view the contract's details.
- View the order number, order start date, order end date, status, contract number associated with the order, and amount.
- Find out the status of an order by reviewing the Status column. Available statuses include:

- Activated – Order has been placed but products have not been installed in your organization.
- Pending – Waiting for approval.
- Provisioned – Products for this order were successfully installed in your organization.

## Orders

Order Number	Order Start Date	Order End Date	Status	Contract Number	Amount
06857500	2/29/2016	2/28/2017	Provisioned	01166739	USD 7,500.00

<< < 1 > >>

- Click a column heading to sort the list in ascending order. Click the heading a second time to sort in descending order.
- Click the Order Number to displayed detailed information.

Order: 06857500

### Order Detail

[Log a Case](#)

Account Name	47@ssp2.test	Order Type	Initial
Contract Number	01166739	Order Start Date	2/29/2016
Contract End Date	2/28/2017	Order End Date	2/28/2017
Status	Provisioned		

Product Name	Quantity	Monthly/Unit Price	Total Amount
Sales Cloud - Enterprise Edition	5.00	USD 125.00	USD 7,500.00

<< < 1 > >>

From the Order Detail page, you can:

- View information about the products ordered as well as details about the order.
- Log a case if you have issues or concerns.
- Click on the contract number to view details of the associated contract.
- The Order Detail section contains the following fields:

Field	Description
Account Name	Name of the account associated with the order.
Contract End Date	Last day the contract is active.
Contract Number	Contract number associated with the order. Click the number to view contract details.
Order End Date	Last day the order is active.
Order Start Date	Date the order originated.
Order Type	Type of order: <ul style="list-style-type: none"> <li>• Activated – Order has been placed but products have not been installed in your organization.</li> <li>• Pending – Waiting for approval.</li> <li>• Provisioned – Products for this order were successfully installed in your organization.</li> </ul>

The Order Products section contains the following fields:

Field	Description
Monthly Unit Price	Invoiced cost of the product per month.
Product Name	Product being ordered.
Publisher Name	Name of the vendor that published the product.
Quantity	Number of a particular product provided to the invoiced company.
Total Amount	Net price for this product. The total amount is equivalent to the quantity multiplied by the unit price. This price is for the item only and does not include tax.

## Installed Products Tab

The Installed Products page contains a list of all products purchased through Checkout and installed in your organization.

Click on the Installed Products tab to view the Installed Products page. The Installed Products list contains all Editions, apps, and services you have purchased.

Installed Products

							<a href="#">Add More Products</a>
Product	Contracts	Orders	Start Date	End Date	Term	Quantity	
Sales Cloud - Enterprise Edition	<a href="#">01166739</a>	<a href="#">06857500</a>	2/29/2016	2/28/2017	12	5	<a href="#">&lt;&lt;</a> <a href="#">&lt;</a> <a href="#">1</a> <a href="#">&gt;</a> <a href="#">&gt;&gt;</a>

Using this list, you can:

- Click an order number to view the order with which a product is associated.
- Click the contract number to view the contract with which a product is associated.
- View the start and end dates, term, and quantity of your installed products or services.
- Click Add More Products to create a new quote for additional seats, products, or services.

On this page, you can view:

- Products, contracts, orders, start date, end date, term, and quantity.
- Select the Contracts link to view contract details (see above for more info).
- Select the Orders link to view order details (see above for more info).

## Statements Tab

A statement provides an overview of financial transactions for all your Salesforce organization's contracts, for a given period of time. You can easily generate and view statements in Checkout. By default, a statement shows activity for the last 365 days. However, you can also select 30, 60, 90, or 120 days or enter start and end dates.

To generate a statement:

1. Click on the Statements tab
2. From the View drop-down list, select a predefined duration or enter start and end dates if those fields are enabled.
3. If your organization has contracts in different currencies, choose a currency from the Contract Currency drop-down list. This drop-down list is disabled if your contracts are in a single currency.
4. Click Show Statement.
  - a. The statement displays at the bottom of the page. The statement contains a summary section that lists the starting balance, the total of all invoices, payments, credits and adjustments, and the current balance.
  - b. The current balance is the amount due or the amount to be refunded after all adjustments, credit memos, and payments have been applied to all invoices for the organization.
  - c. Once you have generated a statement, you can:
    - i. Click a column heading to sort the list in ascending order. Click the heading a second time to sort in descending order.
    - ii. Click Print this Page to view the statement in a printable format. Use your browser's print function to print the statement.
    - iii. Log a case if you have issues or concerns.
    - iv. Click on a reference number to view details for a particular payment, invoice, credit memo, or adjustment.
    - v. Click on a contract number to view details for a particular contract.
  - d. The Statement Activity table displays information about each invoice:

Field	Description
Date	Date the statement was generated.
Description	Type of information in the statement: invoice, credit memos, or adjustment.
Provider	Vendor whose products appear in the statement.
Reference	Reference number used to identify the payment, invoice, credit memo, or adjustment.
Contract	Contract number associated with this statement.



Amount

Amount of the invoice, credit memo, or adjustment.  
A negative number indicates money credited to your account.

## Invoices Tab

The Invoices page contains a list of invoices for your organization. Every time you place an order using Checkout, an invoice is generated.

The Invoice contains a list of all products purchased along with pricing and any additional charges and taxes that are owed.

Click the Invoices tab to view the Invoices home page. From this page, you can:

- Filter the list of invoices using the View drop-down list
- Click the invoice number to view transaction details
- Click the contract number to view the associated contract
- Find out if an invoice is past due
- Click a column heading to sort the list in ascending order. Click the heading a second time to sort in descending order
- Print the page for your personal records
- Log a case if you have issues or concerns

### Invoices

View: Last 365 Days

Invoice Number	Contract Number	Invoice Date	Invoice Due Date	Total Amount	Balance Due	Past Due
<a href="#">automated_1458686706813</a>	<a href="#">01171425</a>	3/22/2016	12/31/2015	USD 19,876.54	USD 19,876.54	<a href="#">Contact Billing</a>
<a href="#">automated_1458686703660</a>	<a href="#">01171425</a>	3/22/2016	2/3/2016	USD 12,345.67	USD 12,345.67	<a href="#">Pay Invoice</a>
<a href="#">automated_1458686700352</a>	<a href="#">01171425</a>	3/22/2016	3/22/2016	USD 9,999.98	USD 9,999.98	
<a href="#">automated_1458686697505</a>	<a href="#">01171425</a>	3/22/2016	1/5/2016	USD 10,000.03	USD 10,000.03	<a href="#">Contact Billing</a>
<a href="#">automated_1458686695059</a>	<a href="#">01171425</a>	3/22/2016	11/5/2015	USD 10,000.00	USD 10,000.00	<a href="#">Pay Invoice</a>
<a href="#">automated_1458686692662</a>	<a href="#">01171425</a>	3/22/2016	1/29/2000	USD 9,995.00	USD 9,995.00	<a href="#">Pay Invoice</a>
<a href="#">automated_1458686689521</a>	<a href="#">01171425</a>	3/22/2016	2/1/2016	USD 9,999.99	USD 9,999.99	<a href="#">Contact Billing</a>
<a href="#">automated_1458686687146</a>	<a href="#">01171425</a>	3/22/2016	1/2/2016	USD 100,000.00	USD 100,000.00	<a href="#">Pay Invoice</a>
<a href="#">automated_1458686684325</a>	<a href="#">01171425</a>	3/22/2016	1/2/2016	USD 1.00	USD 1.00	<a href="#">Pay Invoice</a>
<a href="#">automated_1458686681505</a>	<a href="#">01171425</a>	3/22/2016	4/22/2016	USD 10,000.01	USD 10,000.01	
<a href="#">automated_1458686678581</a>	<a href="#">01171425</a>	3/22/2016	4/22/2016	USD 9,999.00	USD 9,999.00	
<a href="#">automated_1458686671230</a>	<a href="#">01171425</a>	3/22/2016	4/22/2016	USD 10,000.02	USD 10,000.02	

<< < 1 > >>

### Invoice List

Field	Description
Invoice Number	The identification number for this invoice. Click to view details.
Contract	The contract number associated with this invoice.
Invoice Date	The date the invoice was created.
Invoice Due Date	The date that payment is due for this invoice.

Total Amount	The total amount due for the invoice before any payments are applied. May include additional charges and discounts.
Balance Due	The total amount due after all previous payments and credits have been applied.
Past Due	A red icon displays if the invoice is past due.

You can use the View drop-down menu to toggle through different views of your organization's invoices:

- Date range, all invoices, current invoices, past due invoices

For invoices that are past due (indicated by the red icon on the Past Due column), your options vary depending on your payment type

- For credit card, simply pay the past due invoice by selecting the past due icon

Payment Info

Please confirm that you are paying 1.00 on Invoice #automated\_1458686684325 before proceeding.

Card Number \*

Expiration Date \* Month / Year

Security Code \*

First Name \*

Last Name \*

Contact Email \* 147@ssp3.test.ssp.salesforce.com.test

Street \* 1 Market St

City \* San Francisco

State \* California

Zip \* 94105

By clicking the submit button below, I agree that my personal information, including payment information, may be transferred outside the country where I am located for processing purposes. For additional information about salesforce.com's privacy practices, please see <https://www.salesforce.com/company/privacy.jsp>

Submit

- For check or wire transfer, payments up to \$5000 USD can be paid via the Pay Now button on the invoice
- For direct debit, please log a case

Click an invoice number to display detailed information. From this page, you can:

- View information about the invoice including payment and billing information, line item details, and associated applications
- Click Print this Page to generate a printable version of the invoice
- Log a case if you have issues or concerns
- Click Email to send the invoice as an email attachment
- Click the contract number to view details of the associated contract

Invoice details are divided into three sections. The information table displays basic information about the invoice:

Field	Description
Invoice Number	The identification number for this invoice. Click to view details.
Account Name	The name of the account associated with the invoice.
Contract	The contract number associated with this invoice. Click the number to view contract details.
Invoice Date	The date the invoice was created.
Invoice Due Date	The date that payment is due for this invoice.
Total Amount	The total amount due for the invoice before any payments are applied. May include additional charges and discounts.
Total Payment	The net amount due with invoice.
Total Credit	The credit available in the invoiced company's account.
Balance Due	The total amount due after all previous payments and credits have been applied.
Payment Method	The method used to make payments.
Payment Term	The terms for submitting payment. For example, if the Payment Terms are NET 30, the payment is due within 30 days.
Billing Contact	The contact at the company associated with the invoice.
Billing Company Name	The name of the company used for billing.
Billing Address	The address used for billing.
Shipping Address	The address used for shipping.

The Invoice Lines table displays the billing information associated with this invoice.

Field	Description
Service	The name of a product or service associated with the invoice line item.
Provider	Company that provided the product or service, for example Salesforce of a partner.
Billing Reference	Reference to a company's billing information.
Quote	The quote associated with this invoice line item.
Start Date	The first day that the product or service is active.
End Date	The last day that the product or service is active.
Quantity	The number of a particular product or service provided to the invoiced company.
Total Amount	The net amount for this product or service. The total price is equivalent to the quantity multiplied by the unit price. This price is for the item only and does not include tax.

The Applications table displays about the payments and credit memos applied to this invoice.

Field	Description
Payment	A link to the payment detail page associated with this invoice.
Credit Memo	A link to the credit memo associated with this invoice.
Application Date	The date that the amount was applied.
Amount	The amount applied.

## Payments Tab

The Payments home page contains a list of all payments made by your organization.

Click the Payments tab to view the Payments home page. From this page, you can:

- Choose a view from the drop-down list to filter the list of payments

- Click the payment number to view payment details
- Click the contract number to view the associated contract
- View the amount, date, and method of each payment
- Click a column heading to sort the list in ascending order. Click the heading a second time to sort in descending order

Field	Description
Payment Number	Identification number for this payment. Click the number to view payment details.
Contract Number	Number for the contract associated with this payment. Click to view contract details.
Payment Date	Date that this payment was issued.
Payment Method	Type of payment. Available types include: <ul style="list-style-type: none"> <li>• Adjustment-Partial payment or change to the total owed</li> <li>• Check</li> <li>• Credit Card</li> </ul>
Amount	Amount of this payment applied to invoices associated with the contract.
Unapplied Amount	Amount of this payment that has not yet been applied to an invoice for the corresponding contract.

Once you have located a payment on the Payments home or list pages, click the payment number to display detailed information. From this page, you can:

- Click the invoice number to view the associated invoice
- Click the contract number to view the associated contract
- Log a case if you have issues or concerns

Field	Description
Applied To	Invoice to which this payment was applied.
Contract	Contract associated with the invoice to which this payment was applied.
Application Date	Date the payment was applied to the invoice.
Amount	Amount applied to the invoice.

## Credit Memos Tab

The Credit Memos home page contains a list of credits issued to your organization. Credit memos are generated by the billing system to show adjustments to an account and are directly related to invoices.

Click the Credit Memos tab to view the Credit Memos home page. From this page, you can:

- Select a view from the drop-down list to filter the list of credit memos
- Click the credit memo number to view details
- Click the contract number to view the associated contract
- Click the invoice number to view the associated invoice
- Click a column heading to sort the list in ascending order. Click the heading a second time to sort in descending order

To filter the credit memos displayed, select a filter from the drop-down list. Information about each credit memos that meets the filter criteria is displayed:

Field	Description
Credit Memo Number	Number assigned to the credit memo when it was created. Click the number to see details.
Contract	Number of the contract associated with this credit memo. Click the contract number to view the contract details.
Related Invoice	Number of the invoice to which this credit memo applied.
Credit Memo Date	Date that this credit memo was issued.
Total Credit	Total amount of this credit memo. The number is negative because this amount is being credited to your account.

On the Credit Memos home page, click the credit memo number to display detailed information. From this page, you can:

- View information about the credit memo, including details of the products, services, and associated invoices
- Click Print this Page to generate a printable version of the credit memo
- Log a case if you have issues or concerns
- Click the contract number to view the associated contract
- Click the invoice number to view the associated invoice. Credit memo details contain the following fields:

Field	Description
Credit Memo Number	Number assigned to the credit memo when it was created.
Account Name	Name of the account associated with the credit memo.
Account Number	Number assigned to the account.
Related Invoice	Number of the invoice to which this credit memo applied.
Credit Memo Date	Date that this credit memo was issued.
Total Credit	Total amount of this credit memo. The number is negative because this amount is being credited to your account.
Contract	Number of the contract associated with this credit memo. Click the contract number to view the contract details.

The Credit Note Lines table lists and describes the products and services associated with this credit memo. The table contains the following fields:

Field	Description
Service	Name of a product service associated with the credit memo line item.
Provider	Company that provided the product or service, for example Salesforce or a partner.
Billing Reference	Reference to the company's billing information.
Total Amount	Total amount of this credit memo line item.
Quote	The quote associated to the credit memo.
Start Date	The start date of the credit memo.
End Date	The last day of the credit memo.
Quantity	The quantity of the credit memo.

The Applications table lists and describes the invoices associated with this credit memo. The table contains the following fields:

Field	Description
Applied To	Number of the invoices to which this credit memo was applied.
Application Date	Date that the credit amount was applied.
Amount	Amount applied to the application

## Footer

On the bottom of most pages in Checkout, you will see a footer that has relevant information including:

- The name and contact information for your Account Executive
- Click the Send Mail button to email your AE
- Contact information for Salesforce Customer Service
- Link to Frequently Asked Questions
- Link to request assistance with Checkout by logging a case
- Link to our Privacy Statement

