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Client billing information template

Client Contact Information YOUR COMPANY NAME/LOGO

Note: All personal information is held securely in accordance with the appropriate legislation, is confidential and treated appropriately.

Client Information

Mr/Mrs/Miss/Ms/Other _____ Last name _____

Name you like to be called _____

Address _____

Telephone Numbers/Contact Details

Home _____ Work _____

Cellphone _____ Pager _____

Fax _____

Email/s _____

Preferred Contact Mode/s _____

Employment Information

Occupation _____

Employer Name _____

Personal Information

Date of Birth _____ Marital Status _____

No. of Children _____

Significant Other's Name _____

Significant Others Date of Birth _____

Significant Dates (eg. Wedding anniversary) _____

Name(s) and Age(s) of Child(ren) _____

[COMPANY NAME]

Street Address _____ Phone: _____
 Address 2 _____ Fax: _____
 City, ST ZIP Code _____ E-mail: _____

STATEMENT

Statement #: _____ Bill To: Name _____
 Date: _____ Company Name _____
 Customer ID: _____ Street Address _____
 Address 2 _____
 City, ST ZIP Code _____

DATE	TYPE	INVOICE #	DESCRIPTION	AMOUNT	PAYMENT	BALANCE
01/01/2016	Sales	456	Products worth \$500	\$500.00	\$250.00	\$250.00
TOTAL						\$250.00

Reminder: Please include the statement number on your check.
 Terms: Balance due in 30 days.

REMITTANCE

Customer Name: _____
 Customer ID: _____
 Statement #: _____
 Date: _____
 Amount Due: \$250.00
 Amount Enclosed: _____

Client Billing

Date Type: Accounting Period Date Roll Up To Root Customer: True False

Start Date: 2/6/2015 End Date: 3/15/2015

Customer Name: % Branch: ALL

Show Summary: True False Job Title: %

Transaction Type: All Group By: None

Client Billing Report

Affiliate: Sales

For: Period From: 02/06/15 - 03/15/15 Date Type: Accounting Period Date Roll up To Root Customer: False Show Summary: True

Job Title: % Customer Name: All

Transaction Type: All Group By: None

Customer #	Customer Name / Department	Bill Units	Total Bill	No. Of Invoices	No. Of Employees
1087	Alexis Energy/Corporate	140.00	\$5,625.00	4	1
1307	Apple/Corporate	25.00	\$575.00	1	1
1295	Big A's Toy Barn/Corporate	65.00	\$1,072.50	2	2
1300	Bullhorn/Corporate	45.00	\$1,425.00	1	1
1324	Carestream/Admin/Clinical	45.00	\$712.50	1	1
1085	Greatbatch/Corporate	79.00	\$2,384.25	2	2
1314	Java Juice/Corporate	30.00	\$360.00	1	1
1114	Micro Dynamics/Accounting	168.00	\$3,300.00	4	2
1113	MN Plastics/Corporate	163.00	\$4,767.75	8	4
1129	MN Plastics/Offshore	23.00	\$96.00	1	1
1301	Pop Copy/Corporate	80.00	\$2,100.00	2	2
1299	Town Hall Tavern/Corporate	115.00	\$8,425.00	4	4
1107	Ultimate Customer/Corporate	120.00	\$2,966.25	5	4
1305	Vineyard vines/Corporate	95.00	\$925.00	2	2
1317	walton white BHM/Corporate	25.00	\$562.50	1	1
1319	Walker White's Shop HK/Corporate	20.00	\$450.00	1	1

Sales Total					
REG Amount	\$28,422.50	REG Unit	972.00	No. of Customers	36
OT Amount	\$8,294.25	OT Unit	234.00	No. of Employees	26
DT Amount	\$0.00	DT Unit	0.00	No. of Invoice	40

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