Create a Job Invoice for the Entire Job

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To create a Job Invoice for all billable charges for the Job, follow the instructions below.

1. From the Main Application Menu navigate to Job Management and select the Job Queue menu option.

2. The Open Job List will be displayed. Click the Ready to Invoice button from the function buttons located at the top of the Open Job List.

3. All Jobs which are ready to be invoiced will be displayed in the grid area. In the upper right of the list, a count of Jobs to invoice will be listed. In the lower right area the total Install and RMR charges available to be invoiced is shown.

4. To invoice a Job on the list, highlight the Job in the grid area then click the Invoice button located at the lower right of the form or just double-click on the Job row in the grid area.

5. The Job Invoice form will be displayed. All charges for the Job that have not yet been invoiced will fill into the invoice lines section of the invoice form.

- Confirm the information in the Invoice Header is correct; make any changes if necessary.
- If Recurring Charges are being invoiced at this time, make the appropriate date selections in the Bill RMR area of the Invoice Header.
- Navigate to the Items tab; confirm the Install Charges are correct.
- Navigate to the Parts tab and confirm Part Charges, if any.
- Navigate to the WIP tab (if displayed); review the amounts of WIP that will be relieved with this invoice - make any necessary changes to the allocation percentage(s).
- Navigate to the Invoice Footer; accept or change the default Invoice Description. Select or type in a Contact name if needed; this name will print on the invoice. Type in a note in the Memo field if desired; remember this memo field will print on the invoice. The more information provided to your customer relative to the invoice charges, the less likely the invoice will be challenged by your customer.
- If the Invoice will be printed immediately, un-check the Add to Print Queue option.

6. When finished filling in all required information, click the Save button to post the invoice to the G/L and the Customer's account.