

# Job Open Billing

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The Job Open Billing Report is designed to print a listing of Jobs displaying charges for the Job, the the amounts invoiced, and the amounts remaining to be invoiced broken down into three columns; Install Charges, Part Charges and RMR Charges.

This report is generated for Jobs with a Sold Date within a particular Date Range.

Once the desired options have been selected on the report options form, click the OK button to display the report in Print Preview mode.

## Report Selections

**Sold Date** - This option will default to the current month date range. If a different date range is desired you may change the From and To Dates. This report searches on the Sold Date field entered on the Job Work Order form.

**Department** - The default is to display data for All Departments. If the data for only certain Departments is desired, you may highlight the first Department, then depress the CTRL key and highlight additional Departments within the list.

**Salesperson** - The default is to display data for All Salespersons. If the data for only certain Salespersons is desired, you may highlight the first Salesperson, then depress the CTRL key and highlight additional Salespersons within the list.

**Job Status** - The report default is all Job Statuses. you may select a single Job Status from the drop-down list if desired.

*Hide Closed Jobs* - This option is selected by default. If Closed Jobs are to be included in the report, uncheck this option.

*Hide Reversed Jobs* - This option is selected by default. If Reversed Jobs are to be included in the report, uncheck this option.

**Job Type** - The report default is all Job Types. you may select a single Job Type from the drop-down list if desired.

**Installer** - The report default is all Installers. you may select a single Installer from the drop-down list if desired.

**Install Companies** - The report default is all Install Companies. you may select a single Install Company from the drop-down list if desired.

**Sort By** - The report default is to sort by Customer Number. Other Sorting options available are Customer Name and Job Number.

Open Billings

Selections

Sold Date

From Date: 7/1/2017 To Date: 4/30/2018

Department: All, Accounting, Administration, Installation, Sales New, Salesx, Service

Salesperson: All, Oliver Blais, Bill Carroll, Devan Clements, Donald Drake, Scott Hamilton, Michael Johnson, Alexis Johnson, Carolyn Johnson

Job Status: All, Exclude 'Closed' jobs, Exclude 'Reversed' jobs

Job Type: All

Installer: All

Install Company: All

Sort: Customer Number

Ok Close