Batch Invoicing



Batch invoicing gives you the opportunity to create a client's invoice for multiple jobs.

Batch invoices save time and paper (if paper copies are required) as you can specify the client then create just one invoice that details different jobs and their associated costs. You are then requesting one bulk payment which in turn could save your customer time and money in processing.

You have the ability to set the criteria for the search and once this has been established you can create batch invoices with just a few simple clicks. Job Tracker can even be programmed to update the individual job records for you, again saving you time.

B Job Tracker Pro [Se	tup]						
Networking Counte	rs & Data	Documents	File Locations	Maintenance	Email Setup	· Unused ·	
Security / Users Imp	ort	Custom Logo	SMS	Program Features	Sage Line 50	Scanning	
Networking Counter Networking Counter Security / Users Imp Address Look Up Job Tracker Driect Job Tracker Driect Job Tracker Online Program Settings Enable / Disable Features SMS Templates Job Time Bands / SLA Batch Invoicing Imp Filing System Live Jobs Screen Production Module Settings Table / Disable Features	Batch Batch Batch This to Batch the Lix Set I Batch Batch Batch Batch Batch Batch Batch Batch Dath Occursion Dath Dath Dath Dath Dath Dath Dath Dath	Documents Custom Logo tch Invoice, Receiving PA pop half of batch invoici invoice payments are re Jobs Status to: Connels Job Finished box. r Awaiting Payment box nvoice Paid Date to to Save half of batch invoice nvoicing, Generating Invoicing, Generating Invoicing, Baccessibl se in the batch invoice potons below all relate en picking jobs for batc Status Equals: Poode	File Locations SMS SMS ayments ng specifices what to handled via the Awar and the Awar age of	Maintenance Program Features a do when marking multi- ating Payment screen w is ignored if a date is specific is ignored if a date is specific multiple jobs. voice for multiple jobs. woice for multiple jobs.	Email Setup Sage Line 50 Sage Line 50 ipple invoices as paid which is accessible vie ad during batch processing E ₂ /t	Scanning	The first steps involve you defining the criteria for your batch invoices. Click Control Panel, select the tab Program Features, and then select the box Batch Invoicing. This new screen will
Estimate> Job Field Map Business Rules Set Congestion / Surcharges	Whe The Put Set Merg	re the Invoice Paid bo following date is not b the batch Payment Rei Job Status to: Enter the mery pe Codes: Save	x is blank	w the job is shown on the inc	voice. Eggt		pop up.

Figure 1

This pop up screen allows you to specify what to do once the batch invoice has been generated. Taking time to complete these fields upfront could potentially save you and your business a great deal of time. These can of course be changed at any time but note that changing them will not undo previous actions, i.e. if you have the 'Set Job Status' field here set to 'needs scanning', once you create a batch invoice it will complete the action. If you did not want this done on those records you will now need to go back and manually adjust each job.



Batch Invoicing



🛿 Batch Invoice Settings 📃 🗖 🔀		When creating a batch
Batch Invoice, Receiving Payments		invoice you can select
This top half of batch invoicing specifices what to do when marking multiple invoices as paid. Batch invoice navments are bandled via the Awaiting Payment screen which is accesible via		the required jobs from
the Live Jobs Screen		a broad search or
Set Job Status to:		specify in these fields
Tick Job Finished box.		on the lower half of the
Clear Awaiting Payment box.		screen certain criteria
Set Invoice Paid Date to today.		to use each time which
Save		will help speed up the
	1	process.
Batch Invoicing, Generating a single invoice for multiple jobs.		
Batch Invoicing enables you to create a single invoice for multiple jobs.		
datch Invoicing is accessible via the Client I ab on the Jobs Screen All Jobs in the batch invoice will have the same invoice number and copy of the invoice		
document assigned.		
When picking jobs for hatch invoicing, only show jobs that match the following criteria:		In these fields, you can
Job Status Equals: Booked		select the actions that
Where the Invoiced box is blank	you want Job Tracker to	
Where the Invoice Paid box is blank		complete once a batch
The following date is not blank:		invoice has been
Put the batch Payment Reference in field:		created. This will
Set Job Status to:		complete these actions
Enter the merge codes to customise how the job is shown on the invoice.		for every individual job
		included on the batch
		invoice.
	_	
re 2	\backslash	In order to have the
	\backslash	batch reference added
		to each job, simply
		choose a box in the job
		screen where you want
		this captured, then add
		the code for that box in



this field here, i.e. [JOBDETAILS9]

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Batch Invoicing



Once you have assigned your invoice related data to your chosen fields within the Jobs Screen, you will need to visit this screen in Counters & Data to tell Job Tracker which fields to utilise. From the Control Panel, click on the tab Counters and Data.

Job Tracker Pro [Setup] Security / Users Import Custom Logo	SMS	Program Feature	es Sage Line 50	Scanning	Use this dropdown
Networking Louriers & Data Documents System Wide Settings Date Format: dd/mm/yyyy 23/01/ Image: System Wide Settings Date Format: dd/mm/yyyy 23/01/ Image: System Wide Settings Date Format: dd/mm/yyyy 23/01/ Image: System Wide Settings Force date validation on all date fields Use Windows Regional settings for date formatting Currency Symbol: E Manual Description: MANUAL Document and Job Counters M Set Next Job Number: 5007 Set Next Job Number: 5007 Image: Set Next Invoice Number: 1330 Image: Set Next Document Number: 50068 Set Next Document Number: 50068 Set Next Estimate Number: 1018 Image: Set Next Stimate Number: 1018 Image: Set Next Stimate Number: 10482 Additional Counter Formating Append to invoice No: Job Job Append 2 digit Year to Invoice: Invoice Pre-Fix Job Numbers with MMYY Quote Purchase	VAT Tick if VAT regist Tax Descrip Standard VAT Re Reduced VAT Re Reduced VAT Re in Digits: Manual Job Nur Manual Purchas Manual Estimate Numbers: Y** [5007 Numbers: [1300 Numbers: [3108]	manterance	Data Options Replace contacts when Replace contacts when Replace contacts when Make client details comp Search Format: 3 Archive Date: Created Select your Job Due I Delivery Date Select your Quote Due Invoice Options When printing an invoice automatically set the invoice date in the following date b Invoiced ✓ Auto Tick Awailing Pay ✓ Auto Tick Job Finished Terms (days) 30 Use the following field to ho date an invoice was paid. Invoice was paid	<pre>chused - chused - chused</pre>	which field you are utilising to hold the invoice printed date. Once you have applied this, Job Tracker will automatically update this field for you once you select to print the invoice, whether this be via the Job Screen or via Batch Printing.
Live Job Threshold & Colours Show overdue jobs as: SAMPLE	Data Formatting Force addresses to: C	Jpper Case 🙃 Title	Case C Lower Case C No	Format	
Show jobs due within 7 days as: SAMPLE Show jobs due within 30 days as: SAMPLE	Default Job Status: Av	waiting Order sheet	OK <u>C</u> ancel ;		Use this drop down to select the field that you have assigned to record the invoice paid date.

Once you have assigned and labelled your chosen invoice related fields within the Jobs screen, and you have assigned them within the Counters & Data screen as detailed above, you will be able to utilise these fields as search criteria set on the Batch Invoice Settings page as detailed previously in Figure 2.

You are now ready to create batch invoices for any of your clients.

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Batch Invoicing

Creating a batch invoice can be done via the Job screen. Search and access a job for your chosen client in the usual way. You do not need to access a job that needs to be included on the batch invoice, this criteria is set further on (or will be set by any predefined criteria that you have set within the Batch Invoice Settings screen), simply access any job for your chosen client. If you prefer you can access the client using the search facility within the Contacts screen, from here access the history tab and double click any job detailed on the bottom half of the screen.

9		Job Track	er Pro [Jobs]	lob Statue-		- • ×	
New Job	Job Complete	Print Job Sheet	Show Estimate New	Purchase	Invoice No:	Exit	job on the Jobs
Job Details	Client Details ┥	Documents / Emails / SMS	Reminders	Purchase I	Orders Scanning	/ Drag N Drop	screen, click on
Client Details Comp. Addr Post Co Telepho CRM F	ne: Herts Herts & Time ess de: Find Ada ne: Find Ada ile: ax	Pick Clear	Client Job Details Client Ref Booking No Passed By Insurance Ref:	Unused Unused Unused Unused	Received Accepted Completed Unused	67 67 67	the client details tab, checking that you have the correct client identified.
History Notes Em A/C Contacts	ail: No		Unused Unused	Unused Unused	Unused	09	
Client notes for this job. Notes: [press F2 to insert t	The client is the 3	Pick Remove	Batch Invoice	cal Authority etc. (if applica	ble		From here click Batch Invoice, a new page will pop up showing any jobs for this client that match the criteria you have set in the Batch Invoice Settings page.
Figure 4							

This screen will detail for you any jobs for your chosen client that match the criteria specified in the Batch Settings Screen. If no criteria has been set there then all jobs relating to that customer will appear.



Batch Invoicing



One way to select the jobs that you wish to include in the batch invoice is to type the job numbers here, each separated by a comma. Alternatively click once on each relevant job in the list and you will notice it becomes highlighted. The column titled Include will then show a 'yes' and the job number is added to this box for you.

You can tick or untick this box to either include or ignore jobs with a zero value.

		-	Uninvoiced Jol	os for Herts				×	
Client Details Name: Address: Contacts: Completed, I	s Herts Herts_Time, Tel:, Mob:, eMail: Un-invoiced Jobs	4			Sele	ect Jobs nore Zero Value Jobs	Payment Reference:	C8	Completion of this payment reference field is compulsory.
Uninvoiced	Site Address Harford Leisure Dr. Hill Crescent, HertfordCW8 4 Uppominister Street,Epston PortCH66 3PT Jobs: 2 Value of uninvoiced Jobs: £ 130	Created 04/09/2015 04/09/2015 14/09/2015	Email Sent 00:00:00 00:00:00 00:00:00	Status Avvaiting Payment Avvaiting Payment to Invoice: 0	Order No 33365	Net E 1304.84 0.000	Include Gustomer		This reference will show on the invoice, and depending on your selected settings within the batch invoice settings screen you can have this updated on each job making it easier for you to search for relevant associated jobs in the future.
The sele invc	details shown here w ect or deselect a job to pice.	vill adju o be inc	st each tir luded in t	ne you he		Once yo relevant create in generat See Figu templat Job Trac job with will be a Emails/ all the re	bu are hap t jobs sele nvoice. Th ed using ure 6 on h e. tker will a tke invo available SMS tab elevant d	opy that ected fo ne new i your cho low to a nutomat ice num within th for each etails.	you have all the r inclusion, click invoice will be osen template. ssign your chosen ically update each iber, and a copy he Documents/ n job, along with



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Batch Invoicing

A template file can be created in the usual way and assigned here to be used as the default for batch Invoices.



Figure 6



www.job-tracker.co.uk

not necessary.