

Create a New Invoice

Proper invoicing is the heart of your business. The quicker you get an invoice into the hands of a customer, the quicker you can get paid. With **Industrack Invoices**, you can quickly create an invoice from a preloaded price list or by pre-synced items from QuickBooks. Just fill in the necessary materials, services, and labor hours. Other than the **Invoice Module**, you can also create a new invoice from the **customer's Address Book, Invoices tab**.

To create a new invoice, open the **Adding New Invoice window**.

From the **Invoices page**, click on **Add New**.

The screenshot shows the Industrack Invoices page. At the top, there are navigation tabs: MAP, CUSTOMER, ESTIMATES, SCHEDULE, INVOICES (selected), TIMESHEET, P.O., and REPORTS. Below the tabs, there's a summary section with 'Last 30 Days' showing 'Paid' amount of \$11405.80, 'Overdue' amount of \$237.60, and 'Open invoices' amount of \$597169.70. A search bar is present with filters for 'All', 'Unpaid', 'Overdue', and 'Paid'. A red arrow points to a blue '+ ADD NEW' button in the top right corner of the page.

Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
05/24/2023	3463	1203	2151	BAY TO BAY BOAT CLUB	135 Lakeview Ave, Excelsior, MN, 55331		\$136,090.00	\$136,090.00	Unpaid
05/24/2023	3462		2814	Camp Rock	400 S 4th Street, Unit 1000M., Minneapolis, Minnesota, 55415		\$0.00	\$916.00	Paid
05/24/2023	3461		2813	Camp Rock	400 S 4th Street, Unit 1000M., Minneapolis, Minnesota, 55415		\$820.00	\$820.00	Unpaid
05/24/2023	3460		2800	Peter's Plumbing	1601 W Wayzata Blvd., Apt H, LONG LAKE, MN, 55356		\$1,579.50	\$1,579.50	Unpaid
05/24/2023	3459		2804	Complete Air & Heat Inc	1395 South Patrick Dr, Satellite Beach, FL, 32937		\$0.00	\$55.00	Paid
05/22/2023	3457	53	2812	BAY TO BAY BOAT CLUB	135 Lakeview Ave, Excelsior, MN, 55331		\$370.00	\$370.00	Unpaid
05/18/2023	3456	57585	2807	Walmart - Eden Prairie (57)	Walmart- Minnetonka, 19300 solid ave, Minnetonka, MN, 55301	06/17/2023	\$2,591.60	\$2,591.60	Unpaid
05/18/2023	3455	58585	2806	Walmart - Eden Prairie (57)	Walmart- Minnetonka, 19300 solid ave, Minnetonka, MN, 55301	06/17/2023	\$4,263.60	\$4,263.60	Unpaid

The **Adding New Invoice page** will open.

The screenshot shows the 'Adding New Invoice' page. The title 'Adding New Invoice:' is highlighted with a red box. Below the title, there are two search bars: 'Select Customer:' and 'Service Locations:'. The 'Select Customer:' search bar has a list of customers with their names and addresses. The 'Service Locations:' search bar is empty. At the bottom, there are 'PROCEED' and 'CANCEL' buttons.

Select Customer:

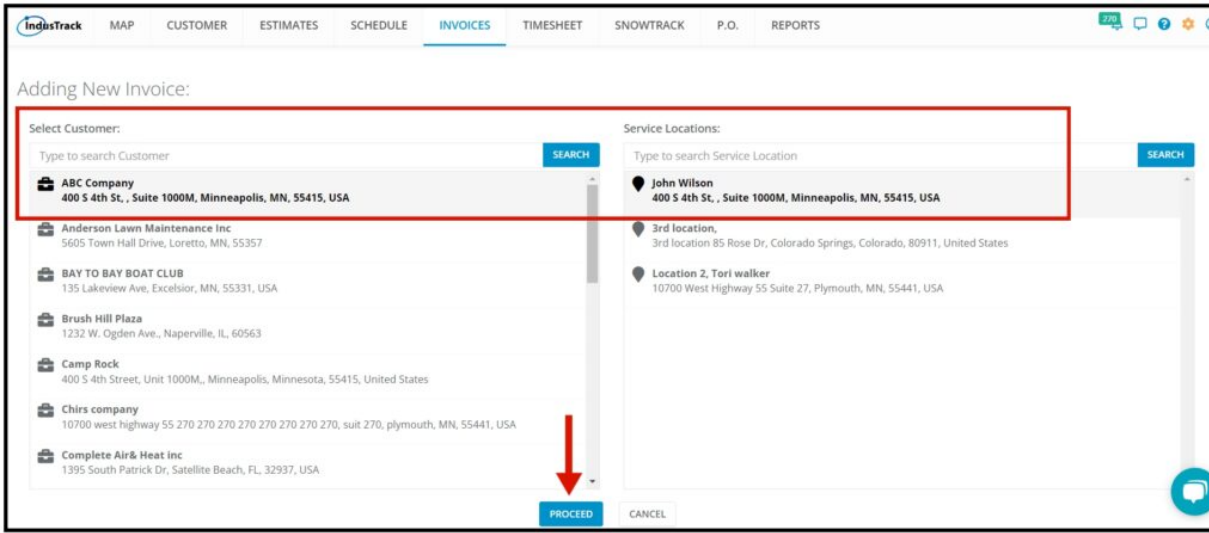
- ABC Company
400 S 4th St., Suite 1000M, Minneapolis, MN, 55415, USA
- Anderson Lawn Maintenance Inc
5605 Town Hall Drive, Loretto, MN, 55357
- BAY TO BAY BOAT CLUB
135 Lakeview Ave, Excelsior, MN, 55331, USA
- Brush Hill Plaza
1232 W. Ogden Ave., Naperville, IL, 60563
- Camp Rock
400 S 4th Street, Unit 1000M., Minneapolis, Minnesota, 55415, United States
- Chirs company
10700 west highway 55 270 270 270 270 270 270 270, suit 270, plymouth, MN, 55441, USA
- Complete Air & Heat Inc
1395 South Patrick Dr, Satellite Beach, FL, 32937, USA

Service Locations:

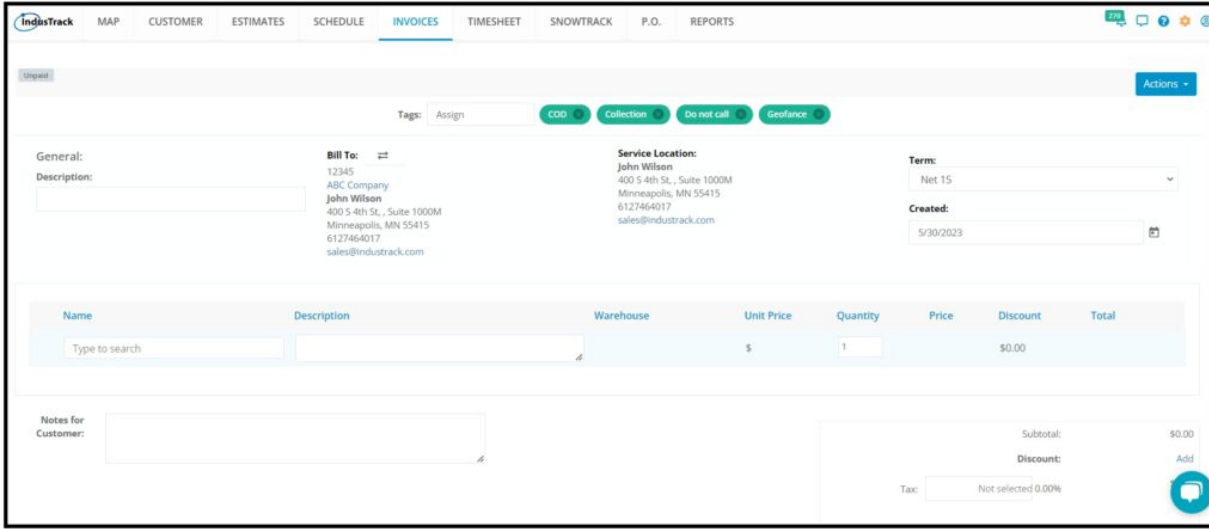
PROCEED CANCEL

Select the Customer and their Location

Scroll down the list of customers to find the correct one. You can also use the **search bar** to quickly find the client's name. Once you've selected a customer all of their service locations will show up. **Select the correct service location and proceed.**



The **Invoice Page** will come up. Fill in the details to create your invoice.



The Invoice Page

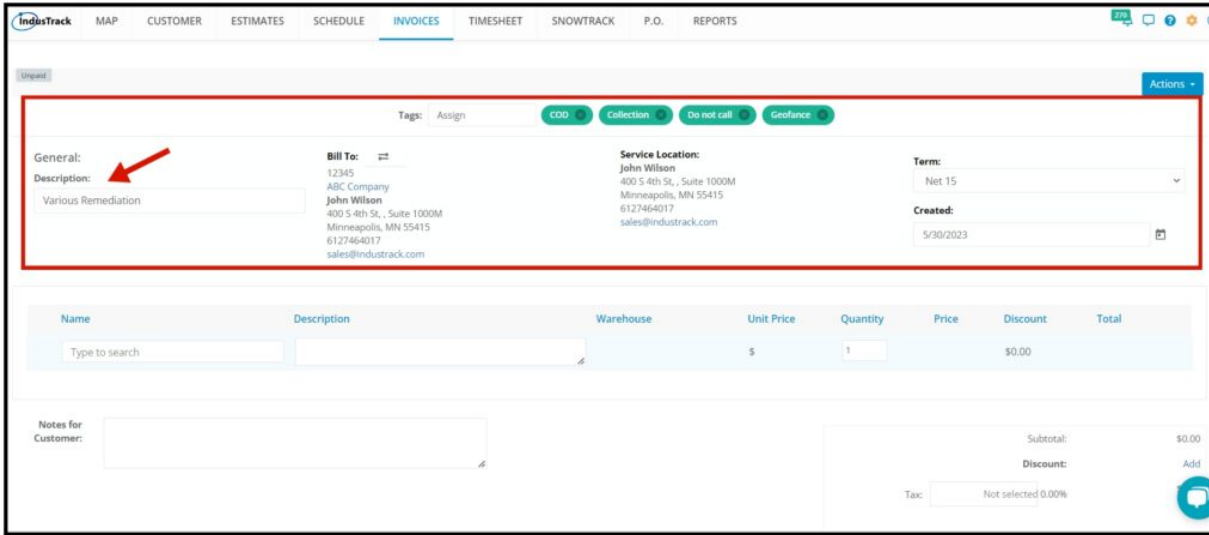
The page has 3 sections, the **invoice description**, **information summary**, and **invoice details**.

Information Summary

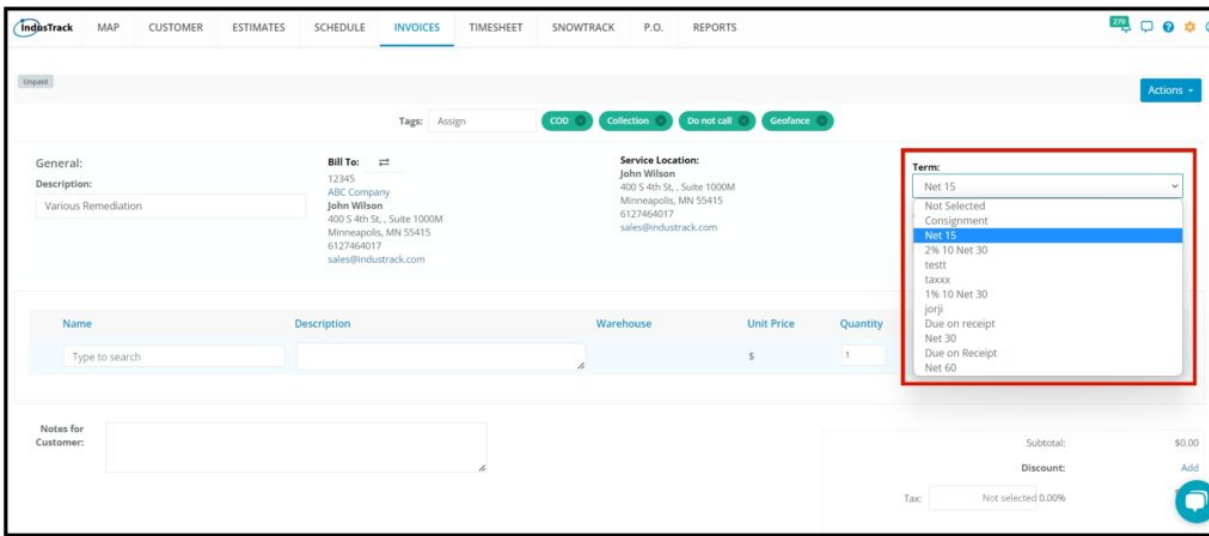
The information summary contains **customer information** with the **terms of payment** and **invoice number**.

If the customer you selected has a term assigned to it, the term will automatically apply. If your invoice number is set to autoincrement the invoice number will be automatically generated.

Give the Invoice a description.

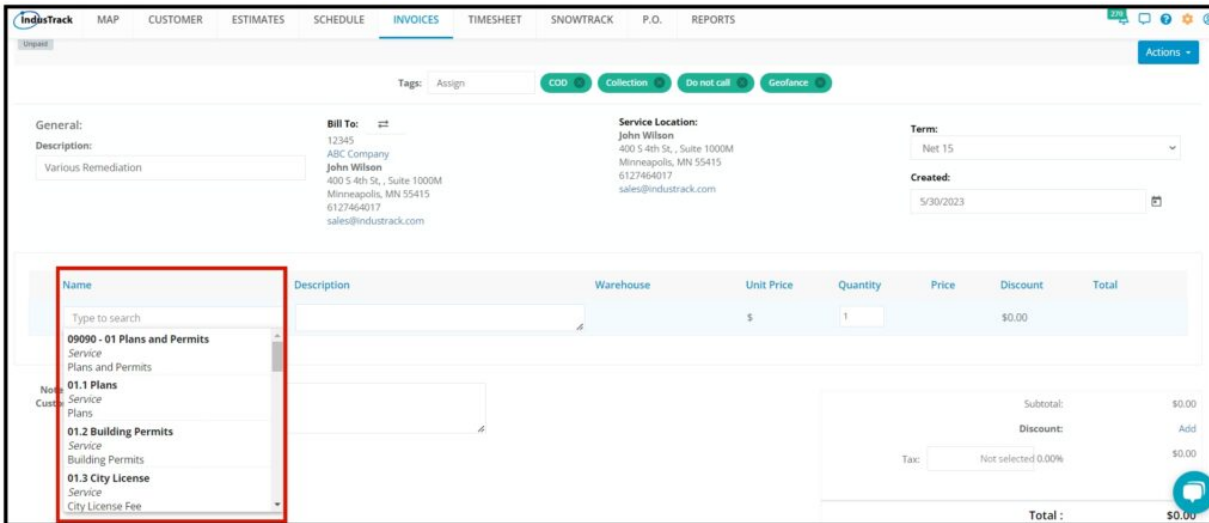


If the **Terms of Payment** are not set up for the customer or you will be using a different one for the invoice you are creating, click on the **Term** field and select from the different terms available.



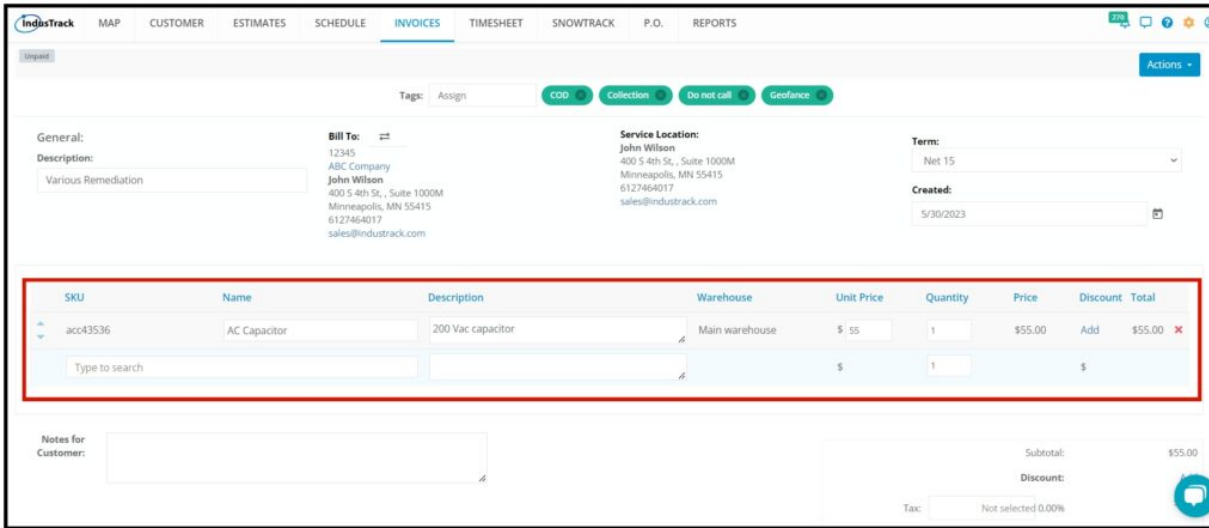
Parts & Services Details

Add the parts and services to the invoice. Click on the **parts and service search bar** and find the part you want from the list and click on it. You can also **search** for a part by typing in the name or number/code of the part or service. **If the item/s you wanted to add is not on the list, scroll down to the very bottom of the list and there will be an option to create a new item.**

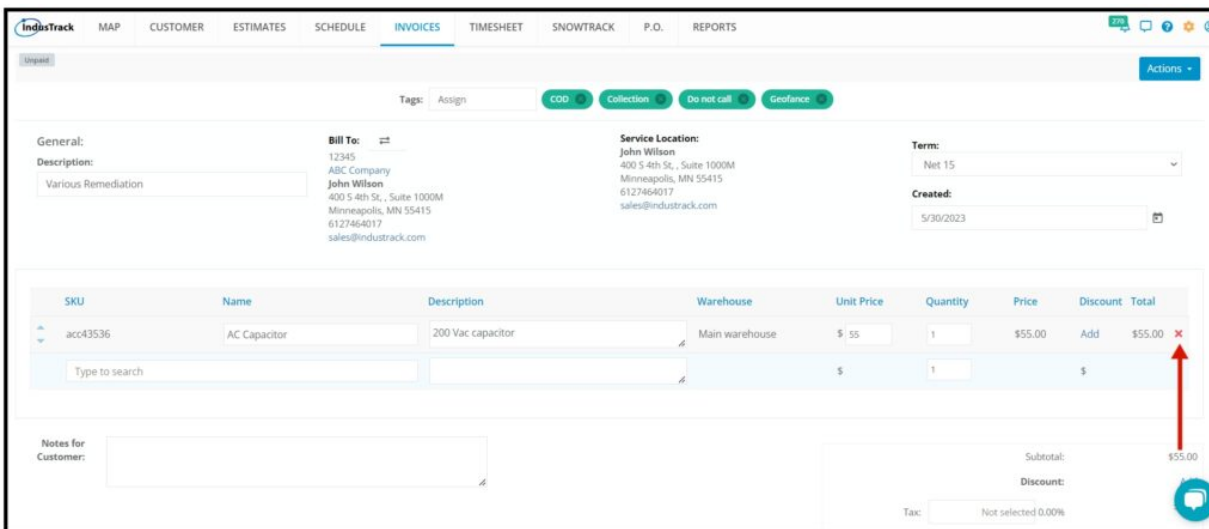


The other fields will auto-fill depending on your selection.

Once you have selected the part or service that you need, **set the quantity** by clicking the arrows or by highlighting the number and typing in the desired quantity. The **Price (total price)** will auto-compute.

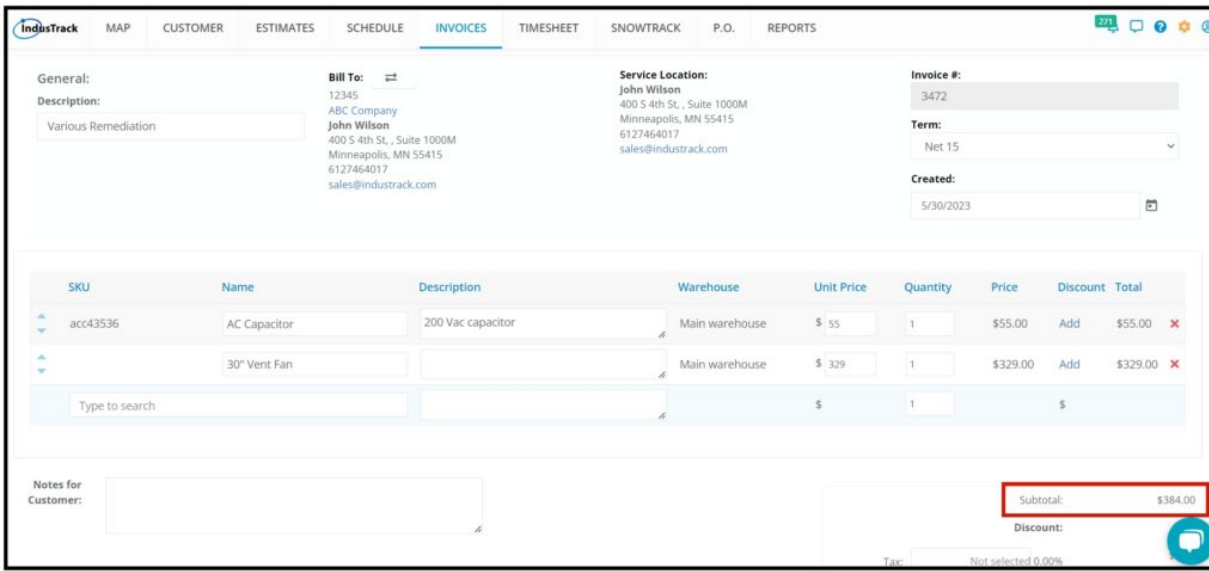


To remove the item from the list, click the **X button** at the far right of the item.



Repeat these steps for each item you want to add to the invoice.

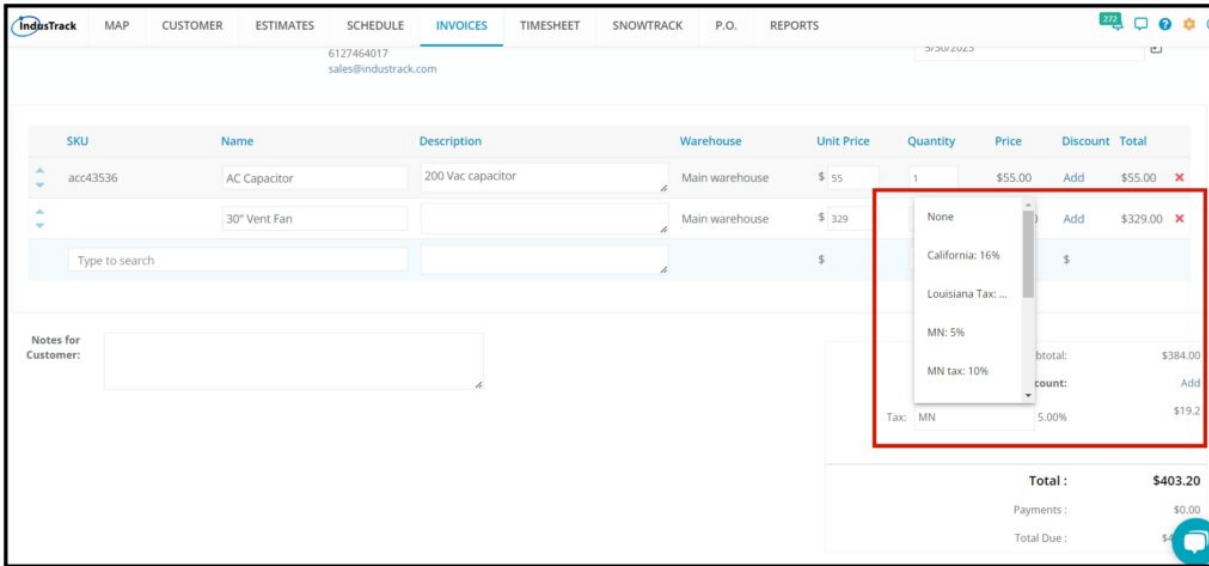
As you add items to your invoice, the **Subtotal field** will auto-calculate.



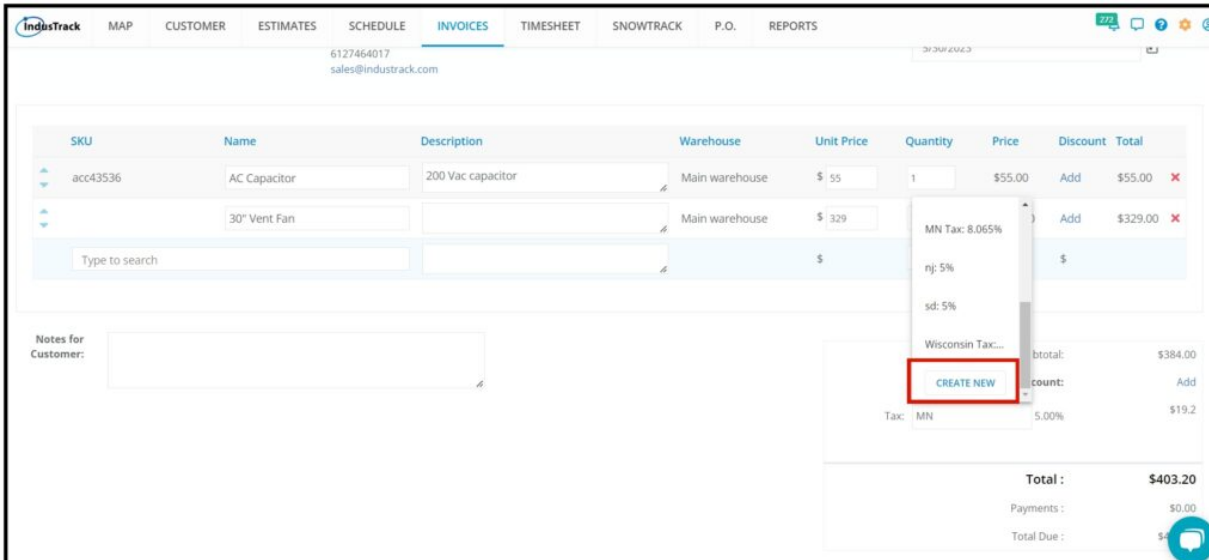
After adding the details, add a discount and set the tax, if applicable.

Either add or revise the tax rate. **Tax Rates** are set up under Company Settings. The Tax Rate applicable for a specific customer is assigned when their profile is created under the Customer Module.

If no tax rate is set up for the customer, click on the **tax field**. If this is already set up but you want to revise it, click the **tax rate** on the tax field.



You can **create a new tax rate** by scrolling down at the very bottom of the list. **Save** the tax rate once done.

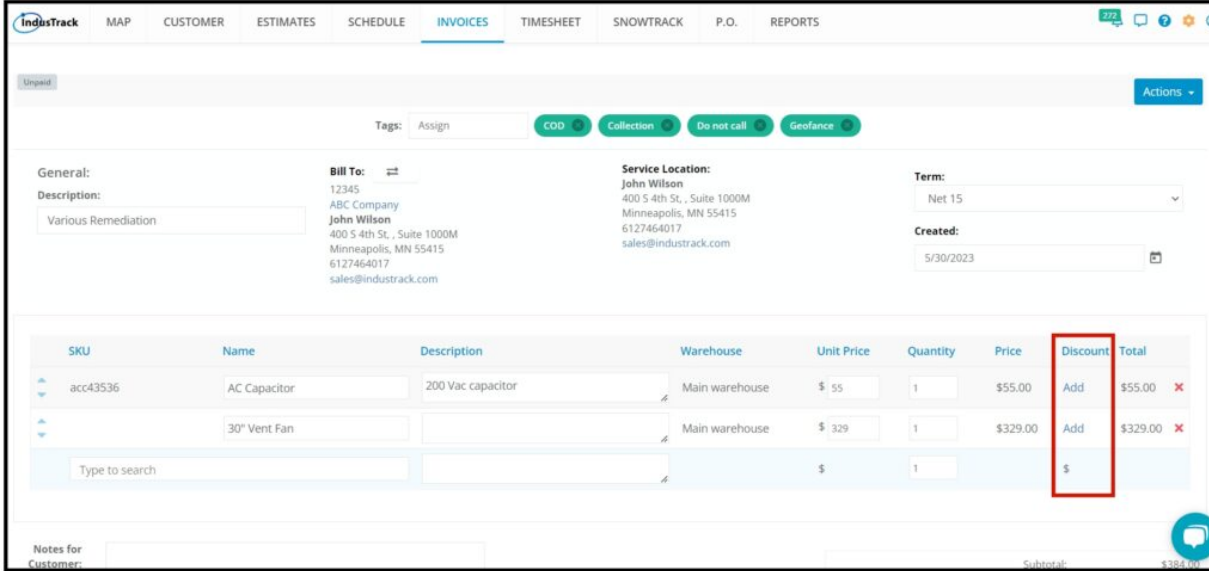


Discount

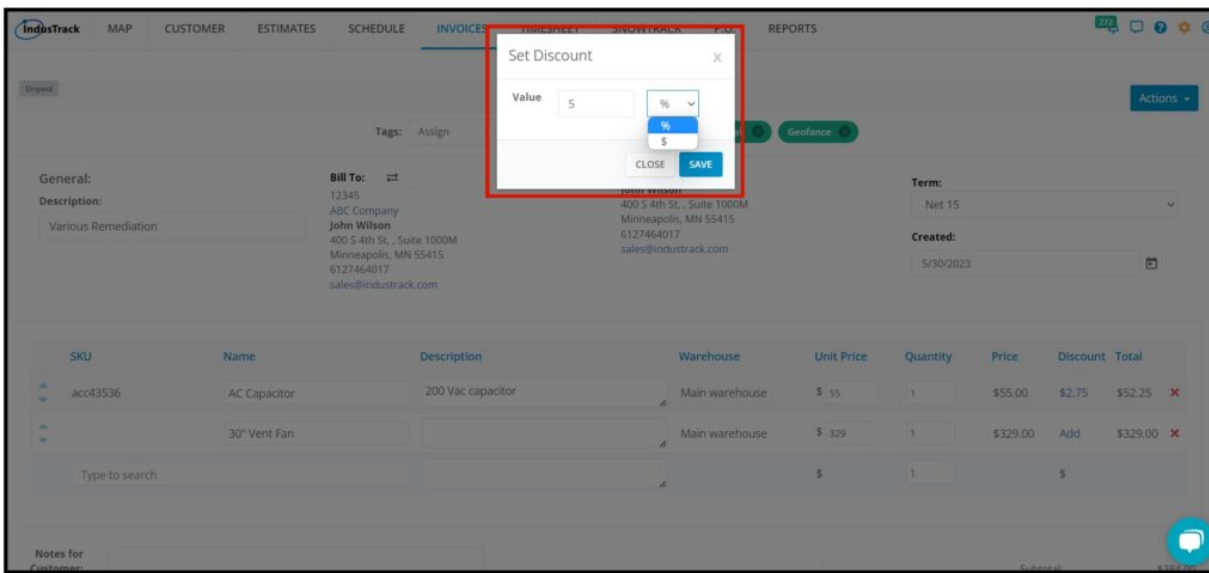
If applicable, add a discount. There are two ways to add a Discount. If there has been a discount applied to the customer profile, the discount will automatically be added.

Add a discount on each line item or Add a discount to the invoice overall.

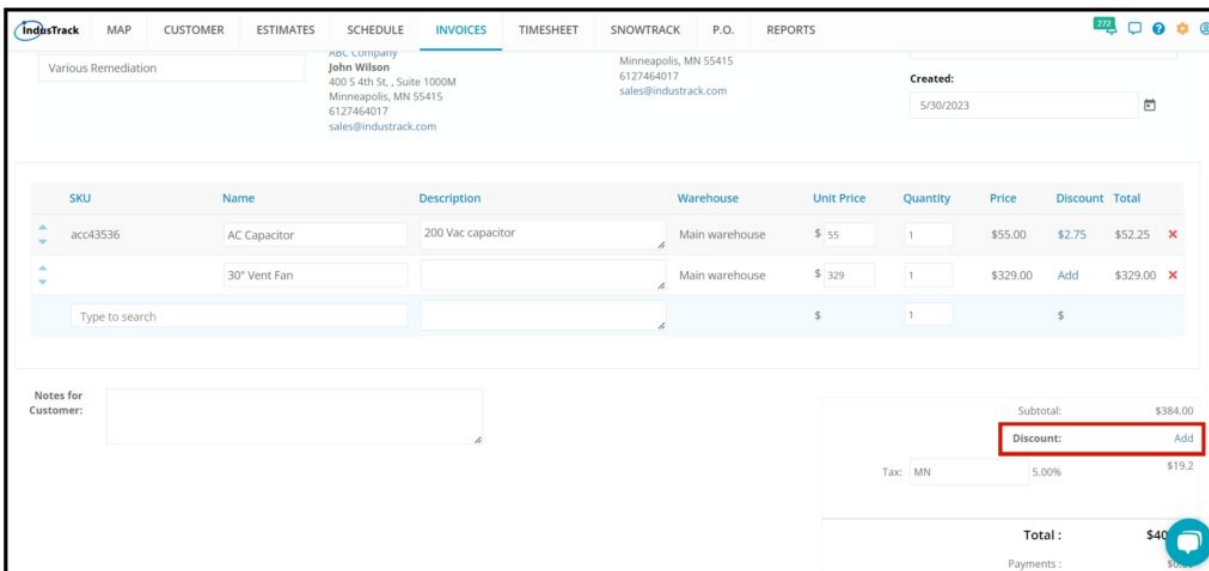
To Add a discount to each of the line items, **click on Add in the Discount Column.**



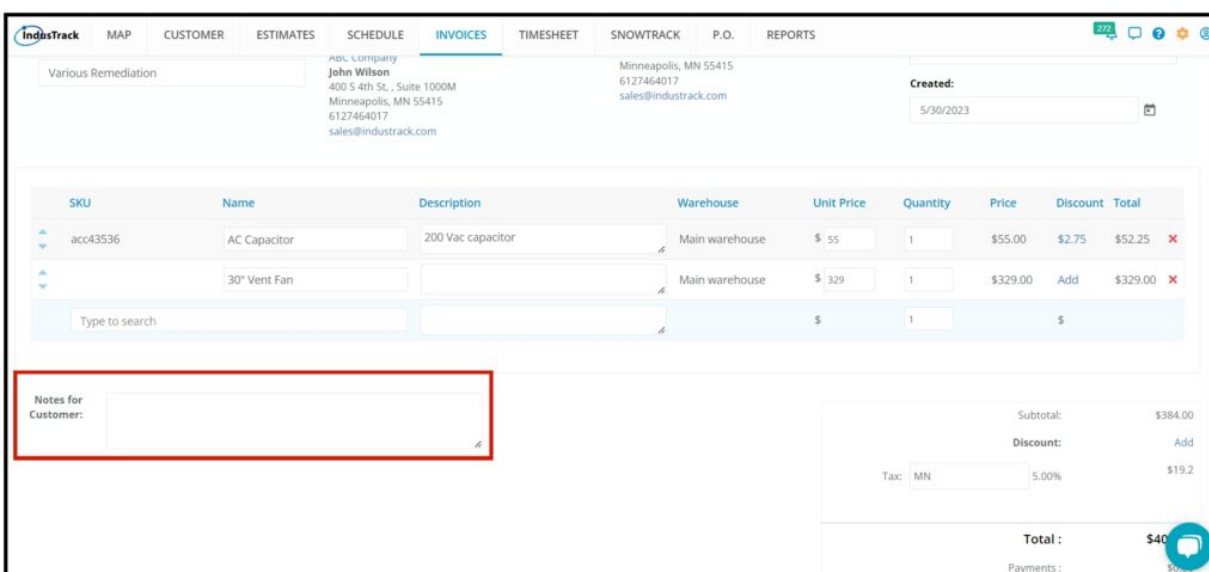
Set discount either in Dollar or percentage.



Add Discount to overall invoice, under the Subtotal the Discount will be seen in there, click on Add.



If there are any notes that you need to add to the invoice, add these to the **Notes for Customer** field.



If you need to further manage the invoice, go to the **Actions** button and select the option from there. Refer to Manage Invoices for the procedures.

Save the New Invoice

On the Actions, click the **Save** button to save the new invoice. The invoice will remain open and you can continue working on it. To save and exit the invoice click the **Save and Close** button.

The screenshot shows the IndusTrack software interface for creating an invoice. The top navigation bar includes 'MAP', 'CUSTOMER', 'ESTIMATES', 'SCHEDULE', 'INVOICES', 'TIMESHEET', 'SNOWTRACK', 'P.O.', and 'REPORTS'. The 'INVOICES' tab is active. Below the navigation bar, there are tags: 'Assign', 'COD', 'Collection', 'Do not call', and 'Geofence'. The main form area is divided into sections: 'General' (Description: Various Remediation), 'Bill To' (12345, ABC Company, John Wilson, 400 S 4th St, Suite 1000M, Minneapolis, MN 55415, 6127464017, sales@industrack.com), 'Service Location' (John Wilson, 400 S 4th St, Suite 1000M, Minneapolis, MN 55415, 6127464017, sales@industrack.com), 'Term' (Net 15), and 'Created' (5/30/2023). A table lists items with columns for SKU, Name, Description, Warehouse, Unit Price, Quantity, Price, and D. The table contains two rows: 'acc43536 AC Capacitor 200 Vac capacitor Main warehouse \$ 55 1 \$55.00 \$2' and '30" Vent Fan Main warehouse \$ 329 1 \$329.00 Ac'. An 'Actions' dropdown menu is open on the right, with 'Save' and 'Save and Close' highlighted in red. Other options include 'Preview', 'Send to E-Mail', 'Print', 'Send Reminder', 'Receive Payment', 'Add discount', 'Copy', and 'Close'. At the bottom, there are fields for 'Notes for Customer' and 'Subtotal: \$384.00'.

The new invoice will be added to the invoice list and the Invoice tab of the customer Address Book.

