

Creating Invoices from different places

Aside from creating invoices from Invoice Module, you can also create invoices from different places.

Create an Invoice from the Customer Page

Go to the Customer Module, and select a Customer you would like to create an invoice.

Under the customer page, create an invoice from the **Invoice Tab**.

The screenshot shows the IndustTrack interface for a customer named ABC Company. The 'Invoices' tab is selected and highlighted with a red box. In the top right corner of the Invoices section, there is a blue button labeled '+ ADD NEW' with a red arrow pointing to it. The main table below shows a list of invoices with columns for Date, Number, Est #, Job #, Company, Location, Due Date, Balance, Total, and Status.

Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
05/26/2023	3471	4556	2824	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	06/25/2023	\$500.00	\$500.00	Unpaid
05/26/2023	3469		2811	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$0.00	\$0.00	Unpaid
05/26/2023	3466			ABC Company	3rd location, 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911		\$1,845.00	\$1,845.00	Unpaid
05/26/2023	3465			ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$1,845.00	\$1,845.00	Unpaid
05/03/2023	2071	1174	2071	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$0.00	\$1,250.00	Paid
05/03/2023	00998		00998	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$55.00	\$55.00	Unpaid

Create an Invoice from a Completed Job/s

From the Completed Jobs Queue, you will be able to convert completed jobs to invoices.

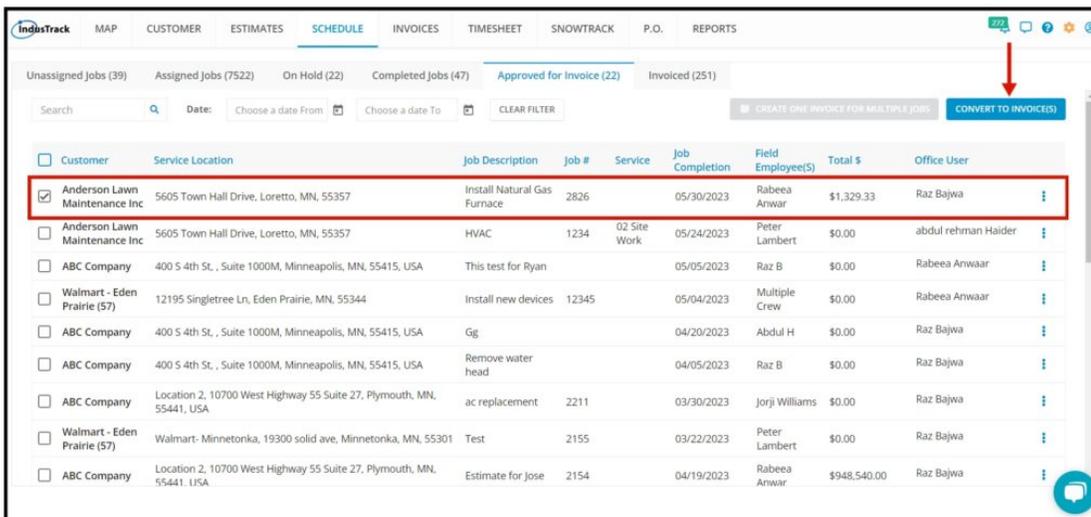
1. **Convert an approved job into an Invoice.**
2. **Convert One Invoice for Multiple Jobs** – Convert multiple jobs from the same customer into one Invoice.
3. **Convert multiple jobs from different customers into separate invoices.**

To do that go to the Scheduling Module, and click on Actions> Jobs Queue. Under the Completed Jobs column mark the selected Job for Approval and from the Approved for Invoice column you can then Convert the Job to Invoice.

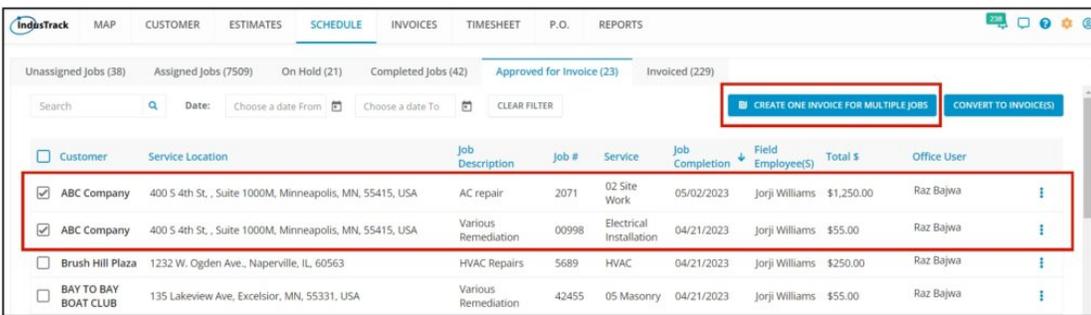
The screenshot shows the IndustTrack SCHEDULE module. The 'Completed jobs (48)' tab is selected. A red box highlights the first job in the list: Anderson Lawn Maintenance Inc, with a total of \$1,329.33. A red arrow points to the 'APPROVE' button in the top right corner.

Customer	Service Location	Job Description	Job #	Service	Job Completion	Field Employee(S)	Total \$	
<input checked="" type="checkbox"/>	Anderson Lawn Maintenance Inc	5605 Town Hall Drive, Loretto, MN, 55357	Install Natural Gas Furnace	2826	05/30/2023	Rabeea Anwar	\$1,329.33	
<input type="checkbox"/>	BAY TO BAY BOAT CLUB	135 Lakeview Ave, Excelsior, MN, 55331, USA	ac units replacement	2821	05/26/2023	Rabeea Anwar	\$2.50	
<input type="checkbox"/>	Anderson Lawn Maintenance Inc	5605 Town Hall Drive, Loretto, MN, 55357	AC service	2820	05/26/2023	Rabeea Anwar	\$2.50	
<input type="checkbox"/>	Anderson Lawn Maintenance Inc	5605 Town Hall Drive, Loretto, MN, 55357	Lawn Wires Sparking	2819	05/26/2023	Rabeea Anwar	\$2.50	
<input type="checkbox"/>	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415, USA	Inspection job	2808	05/24/2023	Raz B	\$570.00	
<input type="checkbox"/>	Complete Air & Heat inc	1395 South Patrick Dr, Satellite Beach, FL, 32937, USA	it's a new job.	2187	WH Gas Valve replacement	05/26/2023	Rabeea Anwar	\$0.00
<input type="checkbox"/>	Walmart - Eden Prairie (57)	12195 Singletree Ln, Eden Prairie, MN, 55344	sweeping lot	swe	12/29/2021	Raz B	\$0.00	
<input type="checkbox"/>	Winco Landscape Inc	8800 13th Ave. E., Shakopee, MN, 55379	test one person wo with helper	121214	12/23/2021	Multiple Crew	\$0.00	
<input type="checkbox"/>	Walmart - Eden Prairie (57)	12195 Singletree Ln, Eden Prairie, MN, 55344	Test time editing		12/23/2021	Multiple Crew	\$0.00	

Convert the Completed Job to Invoice.



If there are multiple jobs from the same customer, you have the option to create one invoice for those multiple jobs as long as it is from the same customer. To do that, Put check marks on the jobs > click on **CREATE ONE INVOICE FOR MULTIPLE JOBS**.



Creating Invoice from the Estimate Module

From the estimate module, select an estimate you would like to convert into an Invoice.

Once you find that Estimate, on the three-dot select **Convert to Invoice**.

After you have converted the estimate into an invoice, the estimate Status will change to Invoiced, and in the Invoice Module you will see the invoice we just converted in the list.

Note that if the Convert to Invoice option is grayed out, that means that the estimate has been converted to Invoice already.

