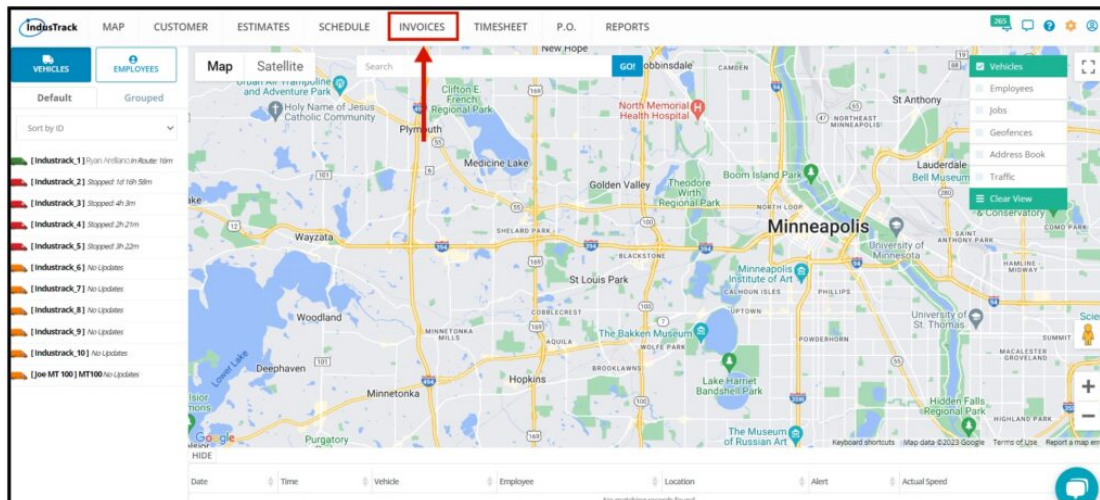


## Manage Invoices

Invoices can be printed, marked as sent or unpaid, or paid or emailed to the customer. If a job is already completed, you can convert that job into an invoice with just a couple of clicks. A won [estimate can also be converted into an invoice](#) even before a job is completed. You can also convert multiple jobs into one invoice.

To work on your invoices, go to **Invoices** on the module header. If the header is grayed out, you do not have any access to the module. If it does not appear on the header, your company account does not have access to it.



### Invoices Dashboard

At the top of the page is a **dashboard** summarizing the status of the invoices. You will see the dollar value of invoices paid in the last 30 days, the value of invoices that are overdue, and the value of invoices that are still open. At a glance, you are able to see the status of the invoices. These are updated every time an invoice is updated or created.

- **Paid in the last 30 days** – These are invoices that have been marked as paid in the last 30 days.
- **Overdue** – These are invoices that remain unpaid beyond the set terms of payment.
- **Open Invoices** – These are invoices that have been prepared or sent to the customers but not paid and are not yet due. The value of Invoices that have **no terms** indicated will be included here even if the invoice has not been paid for quite some time.

Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
05/24/2023	3463	1203	2811	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		2806	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 Viewed: 05/18/2023
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 Viewed: 05/18/2023
05/16/2023	3454			Curb Masters, Inc.	496 Farwell Ave, South St Paul, MN, 55075		\$0.00	\$800.00	Paid
05/16/2023	3453			ERICKSON ASPHALT SERVICES INC	12739 320th Ave, Princeton, MN, 55371		\$0.00	\$250.00	Paid
05/16/2023	3452			Camp Rock	400 S 4th Street, Unit 1000M, Minneapolis, Minnesota, 55415		\$0.00	\$300.00	Paid
05/15/2023	3451	585857	2803	Walmart - Eden Prairie (57)	Walmart - Minnetonka, 19300 solid ave, Minnetonka, MN, 55301		\$0.00	\$1,623.60	Paid
05/14/2023	3450		2801	Walmart - Eden Prairie (57)	Walmart - Minnetonka, 19300 solid ave, Minnetonka, MN, 55301		\$0.00	\$3,247.20	Paid
05/10/2023				Walmart-Plymouth, 12195 Singletree Ln, Eden Prairie, MN, 55344			\$0.00	\$0.00	Unpaid
05/09/2023	1131	1131	1000	Get Plowed Snow Removal	9740 Sheltering Oaks, Brighton, MI, 48114		\$0.00	\$907.00	Paid

### Invoices List

On the page, you will see the listing of all of your invoices that have been created using IndusTrack. The list gives you basic information about the estimates.

- **Date** – This is the date that the invoice was created.
- **Number** – This is the invoice number
- **Estimate Number** – If the invoice has an estimate associated with it, you will be able to see the estimate number.
- **Job Number** – If the invoice has a job associated with it, the job number will be shown.
- **Company** – This is the customer's business name as indicated in their [Address Book](#).
- **Service Location** – This is the [service address](#) where the job (if applicable) was done. This was added when the customer's profile was created and this can be, but not necessarily, the customer's address or location.
- **Due Date** – This is the date when the payment is due, based on the set terms of payment.
- **Balance** – This is the amount still due. It can be the whole invoice amount or what is left unpaid if a partial payment was made.
- **Total** – This is the net total value of the invoice.
- **Status** – This is the stage where the invoice is currently at. It could either be unpaid, paid, partially paid, or overdue.

Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
05/24/2023	3463	1203	2121	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 Viewed: 05/18/2023
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 Viewed: 05/18/2023
05/16/2023	3454			Curb Masters, Inc.	496 Farwell Ave, South St Paul, MN, 55075		\$0.00	\$800.00	Paid
05/16/2023	3453			ERICKSON ASPHALT SERVICES INC	12739 320th Ave, Princeton, MN, 55371		\$0.00	\$250.00	Paid
05/16/2023	3452			Camp Rock	400 S 4th Street, Unit 1000M., Minneapolis, Minnesota, 55415		\$0.00	\$300.00	Paid
05/15/2023	3451	58587	2803	Walmart - Eden Prairie (57)	Walmart- Minnetonka, 19300 solid ave, Minnetonka, MN, 55301		\$0.00	\$1,623.60	Paid
05/14/2023	3450		2801	Walmart - Eden Prairie (57)	Walmart- Minnetonka, 19300 solid ave, Minnetonka, MN, 55301		\$0.00	\$3,247.20	Paid
05/10/2023				Walmart - Plymouth	Walmart-Plymouth, 12195 Singtree Ln, Eden Prairie, MN, 55344		\$0.00	\$0.00	Unpaid
05/03/2023	1131	1131	1001	Get Plowed Snow Removal	9749 Sheltering Oaks, Brighton, MI, 48114		\$0.00	\$907.00	Paid

You can sort the list according to the invoice number, date, company/customer name, due date, and total amount. Just click on the table header to sort the list alphabetically according to the selected header.

Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
05/24/2023	3463	1203	2121	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 Viewed: 05/18/2023
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 Viewed: 05/18/2023

To search for a specific invoice, use the **search bar** at the upper left-hand corner of the page. **Search by Company Name, Invoice Number, or Service Location.**

Use the filters to narrow down the list of invoices.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE **INVOICES** TIMESHEET P.O. REPORTS

Last 30 Days ✓ Paid ! Overdue 📁 Open Invoices  
 \$ 11405.80 \$ 237.60 \$ 597169.70

Search   Date (from/to): Choose a date From  Choose a date To  All Unpaid Overdue Paid

<input type="checkbox"/>	Date ↓	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
<input type="checkbox"/>	05/24/2023	3463	1203	2131	BAY TO BAY BOAT CLUB	135 Lakeview Ave, Excelsior, MN, 55331		\$136,090.00	\$136,090.00	Unpaid
<input type="checkbox"/>	05/24/2023	3462		2814	Camp Rock	400 S 4th Street, Unit 1000M, Minneapolis, Minnesota, 55415		\$0.00	\$916.00	Paid
<input type="checkbox"/>	05/24/2023	3461		2813	Camp Rock	400 S 4th Street, Unit 1000M, Minneapolis, Minnesota, 55415		\$820.00	\$820.00	Unpaid
<input type="checkbox"/>	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
<input type="checkbox"/>	05/24/2023	3459		2804	Complete Air& Heat inc	1395 South Patrick Dr, Satellite Beach, FL, 32937		\$0.00	\$55.00	Paid
<input type="checkbox"/>	05/22/2023	3457	53	2812	BAY TO BAY BOAT CLUB	135 Lakeview Ave, Excelsior, MN, 55331		\$370.00	\$370.00	Unpaid
<input type="checkbox"/>	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 Viewed: 05/18/2023
<input type="checkbox"/>	05/18/2023	3455	58585	2808	Walmart - Eden Prairie (57)	Walmart- Minnetonka, 19300 solid ave, Minnetonka, MN, 55301	06/17/2023	\$4,263.60	\$4,263.60	Unpaid Viewed: 05/18/2023

Set the **dates** field to show invoices that were created between the selected dates.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE **INVOICES** TIMESHEET P.O. REPORTS

Last 30 Days ✓ Paid ! Overdue 📁 Open Invoices  
 \$ 11405.80 \$ 237.60 \$ 597169.70

Search   Date (from/to): Choose a date From  Choose a date To  All Unpaid Overdue Paid

<input type="checkbox"/>	Date ↓	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
<input type="checkbox"/>	05/24/2023	3463	1203	2131	BAY TO BAY BOAT CLUB	135 Lakeview Ave, Excelsior, MN, 55331		\$136,090.00	\$136,090.00	Unpaid
<input type="checkbox"/>	05/24/2023	3462		2814	Camp Rock	400 S 4th Street, Unit 1000M, Minneapolis, Minnesota, 55415		\$0.00	\$916.00	Paid
<input type="checkbox"/>	05/24/2023	3461		2813	Camp Rock	400 S 4th Street, Unit 1000M, Minneapolis, Minnesota, 55415		\$820.00	\$820.00	Unpaid
<input type="checkbox"/>	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
<input type="checkbox"/>	05/24/2023	3459		2804	Complete Air& Heat inc	1395 South Patrick Dr, Satellite Beach, FL, 32937		\$0.00	\$55.00	Paid
<input type="checkbox"/>	05/22/2023	3457	53	2812	BAY TO BAY BOAT CLUB	135 Lakeview Ave, Excelsior, MN, 55331		\$370.00	\$370.00	Unpaid
<input type="checkbox"/>	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 Viewed: 05/18/2023
<input type="checkbox"/>	05/18/2023	3455	58585	2808	Walmart - Eden Prairie (57)	Walmart- Minnetonka, 19300 solid ave, Minnetonka, MN, 55301	06/17/2023	\$4,263.60	\$4,263.60	Unpaid Viewed: 05/18/2023

Filter the invoice list according to **status**.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE **INVOICES** TIMESHEET P.O. REPORTS

Last 30 Days ✓ Paid ! Overdue 📁 Open Invoices  
 \$ 11405.80 \$ 237.60 \$ 597169.70

Search   Date (from/to): Choose a date From  Choose a date To  All Unpaid Overdue Paid

<input type="checkbox"/>	Date ↓	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
<input type="checkbox"/>	05/24/2023	3463	1203	2131	BAY TO BAY BOAT CLUB	135 Lakeview Ave, Excelsior, MN, 55331		\$136,090.00	\$136,090.00	Unpaid
<input type="checkbox"/>	05/24/2023	3462		2814	Camp Rock	400 S 4th Street, Unit 1000M, Minneapolis, Minnesota, 55415		\$0.00	\$916.00	Paid
<input type="checkbox"/>	05/24/2023	3461		2813	Camp Rock	400 S 4th Street, Unit 1000M, Minneapolis, Minnesota, 55415		\$820.00	\$820.00	Unpaid
<input type="checkbox"/>	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
<input type="checkbox"/>	05/24/2023	3459		2804	Complete Air& Heat inc	1395 South Patrick Dr, Satellite Beach, FL, 32937		\$0.00	\$55.00	Paid
<input type="checkbox"/>	05/22/2023	3457	53	2812	BAY TO BAY BOAT CLUB	135 Lakeview Ave, Excelsior, MN, 55331		\$370.00	\$370.00	Unpaid
<input type="checkbox"/>	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 Viewed: 05/18/2023
<input type="checkbox"/>	05/18/2023	3455	58585	2808	Walmart - Eden Prairie (57)	Walmart- Minnetonka, 19300 solid ave, Minnetonka, MN, 55301	06/17/2023	\$4,263.60	\$4,263.60	Unpaid Viewed: 05/18/2023

## More Actions

To view payments received transaction history, click on more actions and select **View Payments**.



Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
05/30/2023	3476			ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	06/14/2023	\$329.00	\$329.00	Unpaid
05/30/2023	3475			Brush Hill Plaza	1232 W. Ogden Ave., Naperville, IL, 60563		\$250.00	\$250.00	Unpaid Sent: 05/30/2023
05/30/2023	3474			ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$173.25	\$173.25	Unpaid
05/30/2023	3473	2816		Walmart - Eden Prairie (57)	12195 Singletree Ln, Eden Prairie, MN, 55344		\$1,864.00	\$1,864.00	Unpaid
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	3470	2822	2823	Camp Rock	400 S 4th Street, Unit 1000M, Minneapolis, Minnesota, 55415		\$916.00	\$916.00	Unpaid
05/26/2023	3469	2811		ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$0.00	\$0.00	Unpaid

On the Payments Page, you will be able to see here all of the payments received with info on **when it was paid, the invoice number, the customer, payment method, amount paid, and reference number if any.**

Paid On	Invoice Numbers	Customer	Payment Method	Reference #	Amount
05/30/2023	42455	BAY TO BAY BOAT CLUB	Cash		\$981.00
05/24/2023	3459	Complete Air & Heat inc	Cash		\$55.00
05/24/2023	3462	Camp Rock	Cash		\$916.00
05/16/2023	3452	Camp Rock	Cash		\$300.00
05/16/2023	3450	Walmart - Eden Prairie (57)	Cash		\$3,247.20
05/15/2023	5689	Brush Hill Plaza	Cash		\$250.00
05/14/2023	3451, No Number	Walmart - Eden Prairie (57)	Cash		\$3,223.60
05/14/2023	1131	Get Plowed Snow Removal	Cash		\$907.00
05/13/2023	2071	ABC Company	Cash		\$1,250.00
05/13/2023	42455	BAY TO BAY BOAT CLUB	Cash		\$55.00

## Mark for Sync Option

If your Industrack account has been integrated with Quickbooks, here is how you sync your invoices.

Put a checkmark on all of the Invoices you wanted to sync to Quickbooks and click on Mark for Sync.

IndusTrack

MAP

CUSTOMER

ESTIMATES

SCHEDULE

INVOICES

TIMESHEET

SNOWTRACK

P.O.

REPORTS

Open Invoices

Last 30 Days

✓

Paid

\$ 12386.80

!

Overdue

\$ 0.00

🚚

Open Invoices

\$ 155640.51

Search

Date (from/to):

Choose a date From

Choose a date To

All

Unpaid

Overdue

Paid

CLEAR FILTER

+ ADD NEW

More Actions

☑

Date

Number

Est #

Job #

Company

Location

Due Date

Balance

Total

Status

☑

05/30/2023

3476

ABC Company

400 S 4th St., Suite 1000M, Minneapolis, MN, 55415

06/14/2023

\$329.00

\$329.00

Unpaid

☑

05/30/2023

3475

Brush Hill Plaza

1232 W. Ogden Ave., Naperville, IL, 60563

\$250.00

\$250.00

Unpaid Sent: 05/30/2023

☑

05/30/2023

3474

ABC Company

400 S 4th St., Suite 1000M, Minneapolis, MN, 55415

\$173.25

\$173.25

Unpaid

☐

05/30/2023

3473

2816

Walmart - Eden Prairie (57)

12195 Singletree Ln, Eden Prairie, MN, 55344

\$1,864.00

\$1,864.00

Unpaid

☐

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

3470

2822

Camp Rock

400 S 4th Street, Unit 1000M, Minneapolis, Minnesota, 55415

\$916.00

\$916.00

Unpaid

☐

05/26/2023

3469

2811

ABC Company

400 S 4th St., Suite 1000M, Minneapolis, MN, 55415

\$0.00

\$0.00

Unpaid

View Payments

Mark for Sync

## Edit, Preview, Send, Print, Delete, Clone Invoices, and Receive Payments

If you have mistakenly input the wrong data on the invoice, you can always edit them.

From the **Invoices List**, find the specific invoice to be edited. **Click on it to open** or **click on the three dots on the right-hand side and click on edit**.

Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
05/30/2023	3476			ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	06/14/2023	\$329.00	\$329.00	Unpaid
05/30/2023	3475			Brush Hill Plaza	1232 W. Ogden Ave., Naperville, IL, 60563		\$250.00	\$250.00	Unpaid
05/30/2023	3474			ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$173.25	\$173.25	Unpaid
05/30/2023	3473	2816		Walmart - Eden Prairie (57)	12195 Singletree Ln, Eden Prairie, MN, 55344		\$1,864.00	\$1,864.00	Unpaid
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	3470		2822	Camp Rock	400 S 4th Street, Unit 1000M, Minneapolis, Minnesota, 55415		\$916.00	\$916.00	Unpaid
05/26/2023	3469		2811	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$0.00	\$0.00	Unpaid

After clicking on the Invoice, the Invoice will open up. Edit all the necessary info you need to edit.

Once done editing, click on Actions and select Save or Save and Close.

General: Description: AC Replacement

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

Invoice #: 3476

Term: Net 15

Created: 5/30/2023

Name	Description	Warehouse	Unit Price	Quantity	Price	Discount
30" Vent Fan		Main warehouse	\$ 329	1	\$329.00	Add
Type to search			\$	1	\$	

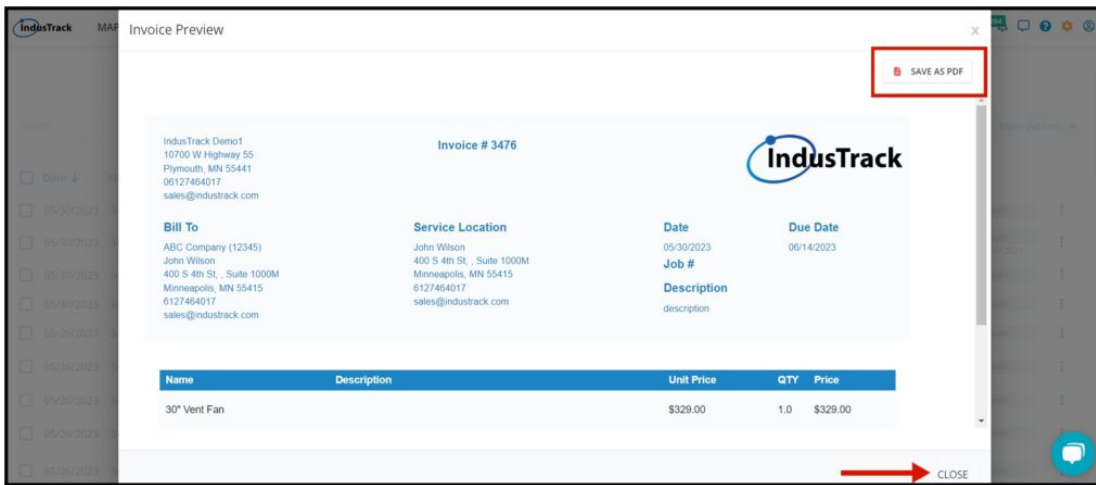
## Preview Invoice

If you want to see the look and feel of your invoice, select which invoice you wanted to preview and on the right-hand side click on the three-dot and select **Preview**.

Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
05/30/2023	3476			ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	06/14/2023	\$329.00	\$329.00	Unpaid
05/30/2023	3475			Brush Hill Plaza	1232 W. Ogden Ave., Naperville, IL, 60563		\$250.00	\$250.00	Unpaid
05/30/2023	3474			ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$173.25	\$173.25	Unpaid
05/30/2023	3473	2816		Walmart - Eden Prairie (57)	12195 Singletree Ln, Eden Prairie, MN, 55344		\$1,864.00	\$1,864.00	Unpaid
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	3470		2822	Camp Rock	400 S 4th Street, Unit 1000M, Minneapolis, Minnesota, 55415		\$916.00	\$916.00	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	3468			Camp Rock	400 S 4th Street, Unit 1000M, Minneapolis, Minnesota, 55415	08/24/2023	\$1,206.86	\$1,206.86	Unpaid
05/26/2023	3467			Anderson Lawn Maintenance Inc	5605 Town Hall Drive, Loretto, MN, 55357		\$2.50	\$2.50	Unpaid

After clicking on **Preview**, you will see how your Invoice looks if you **download it as a PDF File**, this is how your invoice will look once you send it to the customer.

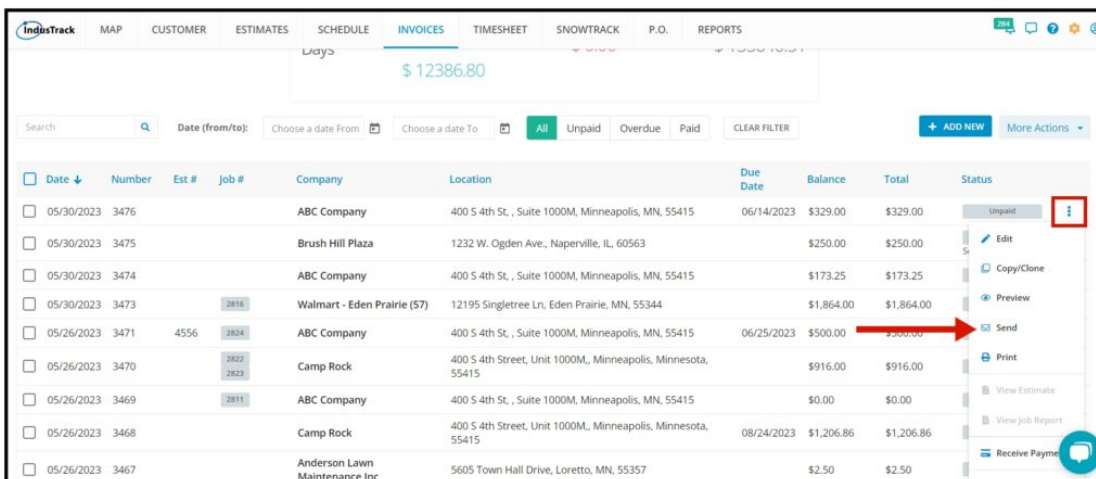
On the Preview, you will have an option as well to save it as a PDF File. To exit the preview click on Close.



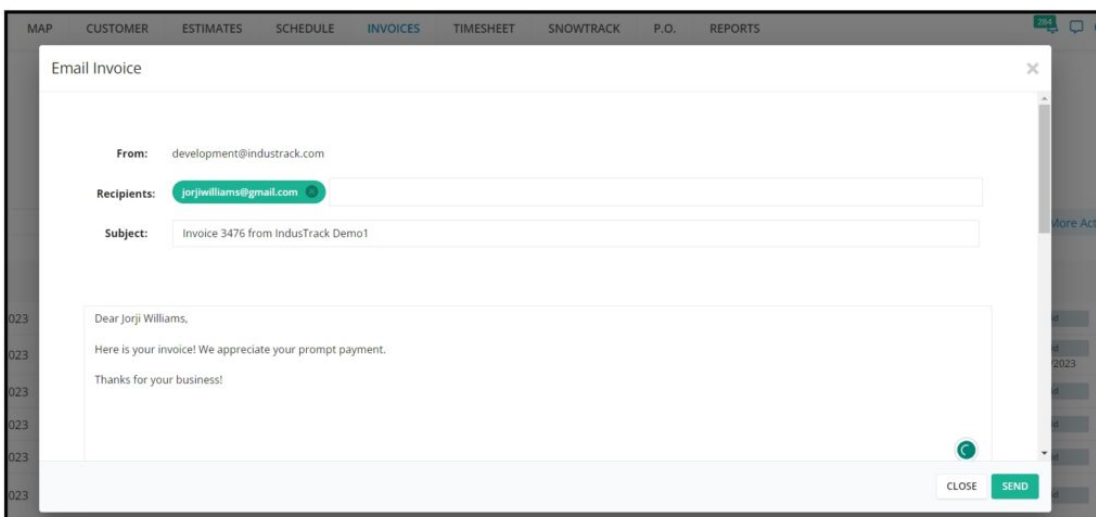
## Send Invoice

Send your invoices to your customers. To do that, **select the correct invoice you want to send and on the right-hand side click on the three dots.**

Click on **Send**.



An email Invoice window will pop up. **You will be able to Edit the Subject line, add multiple recipients, and an option to Include the Invoice body to the Email.**



And if you scroll down, you will see the preview of the invoice body and details. **Click on Send to send the Invoice.**

MAP CUSTOMER ESTIMATES SCHEDULE **INVOICES** TIMESHEET SNOWTRACK P.O. REPORTS

Email Invoice

Total due \$329.00 Due Date: 06/14/2023

Bill To:  
ABC Company  
(12345)  
John Wilson  
400 S 4th St, Suite 1000M  
Minneapolis, MN 55415 USA

Service Location:  
John Wilson  
400 S 4th St, Suite 1000M  
Minneapolis, MN 55415 USA

Invoice # 3476  
Term: Net 15  
Created: 05/30/2023

Parts & Service Number	Name	Description	Unit Price	Quantity	Price
	30" Vent Fan		\$ 329.00	1	\$ 329.00

NOTE:

Subtotal: \$329.00  
Total: \$329.00  
Total Due: \$329.00

CLOSE SEND

After sending the invoice, notice that the status of the invoice changed to Sent and there is a date of when it was sent.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE **INVOICES** TIMESHEET SNOWTRACK P.O. REPORTS

Last 30 Days ✓ Paid ! Overdue \$ 0.00 📧 Open invoices \$ 155640.51

\$ 12386.80

Search  Date (from/to): Choose a date From Choose a date To All Unpaid Overdue Paid CLEAR FILTER + ADD NEW More Actions

Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
<input type="checkbox"/> 05/30/2023	3476			ABC Company	400 S 4th St, Suite 1000M, Minneapolis, MN, 55415	06/14/2023	\$329.00	\$329.00	Unpaid Sent: 05/30/2023

If the customer opened the email, the status will change to viewed.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE **INVOICES** TIMESHEET SNOWTRACK P.O. REPORTS

Last 30 Days ✓ Paid ! Overdue \$ 0.00 📧 Open invoices \$ 155640.51

\$ 12386.80

Search  Date (from/to): Choose a date From Choose a date To All Unpaid Overdue Paid CLEAR FILTER + ADD NEW More Actions

Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
<input type="checkbox"/> 05/30/2023	3476			ABC Company	400 S 4th St, Suite 1000M, Minneapolis, MN, 55415	06/14/2023	\$329.00	\$329.00	Unpaid Viewed: 05/30/2023



## Print Invoice

To Print the Invoice, select the correct invoice. On the three dots, select Print.

The screenshot shows the IndusTrack interface with the 'INVOICES' tab selected. A summary bar at the top shows a total of \$12,386.80. Below this is a table of invoices. The first row, invoice 3476, is highlighted. A red box is drawn around the three-dot menu icon to the right of the 'Unpaid' status. A red arrow points from this menu to the 'Print' option in the dropdown list.

Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
05/30/2023	3476			ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	06/14/2023	\$329.00	\$329.00	Unpaid
05/30/2023	3475			Brush Hill Plaza	1232 W. Ogden Ave., Naperville, IL, 60563		\$250.00	\$250.00	
05/30/2023	3474			ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$173.25	\$173.25	
05/30/2023	3473	2816		Walmart - Eden Prairie (57)	12195 Singletree Ln, Eden Prairie, MN, 55344		\$1,864.00	\$1,864.00	
05/26/2023	3471	4556	2824	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	06/25/2023	\$500.00	\$500.00	
05/26/2023	3470		2822	Camp Rock	400 S 4th Street, Unit 1000M, Minneapolis, Minnesota, 55415		\$916.00	\$916.00	
05/26/2023	3469		2811	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$0.00	\$0.00	
05/26/2023	3468			Camp Rock	400 S 4th Street, Unit 1000M, Minneapolis, Minnesota, 55415	08/24/2023	\$1,206.86	\$1,206.86	
05/26/2023	3467			Anderson Lawn Maintenance Inc	5605 Town Hall Drive, Loretto, MN, 55357		\$2.50	\$2.50	

## Copy/Clone Invoice

In Indutrack, you can clone or duplicate your invoice as well.

To do that, select which invoice you would like to clone. On the right-hand side click on the three dots and select **Copy/Clone**.

This screenshot is similar to the first one, but the red arrow now points to the 'Copy/Clone' option in the dropdown menu for invoice 3476. The 'Print' option is also visible in the menu.

The Invoice has now been duplicated.

The screenshot shows the result of cloning invoice 3476. A new invoice, 3477, has been created with identical details to 3476. Both invoices are listed at the bottom of the screen, each with a balance of \$329.00 and a status of 'Unpaid'.

Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
05/30/2023	3477			ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	06/14/2023	\$329.00	\$329.00	Unpaid
05/30/2023	3476			ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	06/14/2023	\$329.00	\$329.00	Unpaid



If you want to delete an invoice, the delete option will be seen when clicking on the three dots as well. Select Delete and the invoice will be deleted and removed from the list.

Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
05/30/2023	3477			ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	06/14/2023	\$329.00	\$329.00	Unpaid
05/30/2023	3476			ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	06/14/2023	\$329.00	\$329.00	Unpaid
05/30/2023	3475			Brush Hill Plaza	1232 W. Ogden Ave., Naperville, IL, 60563		\$250.00	\$250.00	Unpaid
05/30/2023	3474			ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$173.25	\$173.25	Unpaid
05/30/2023	3473	2816		Walmart - Eden Prairie (57)	12195 Singletree Ln, Eden Prairie, MN, 55344		\$1,864.00	\$1,864.00	Unpaid
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	3470	2822	2823	Camp Rock	400 S 4th Street, Unit 1000M, Minneapolis, Minnesota, 55415		\$916.00	\$916.00	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	3468			Camp Rock	400 S 4th Street, Unit 1000M, Minneapolis, Minnesota, 55415	08/24/2023	\$1,206.86	\$1,206.86	Unpaid
05/26/2023	3467			Anderson Lawn Maintenance Inc	5605 Town Hall Drive, Loretto, MN, 55357		\$2.50	\$2.50	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

## Receive Payments

If the customer is ready to pay for the invoice, click on the three dots on the right-hand side and select **Receive Payment**.

Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
05/30/2023	3477			ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	06/14/2023	\$329.00	\$329.00	Unpaid
05/30/2023	3476			ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	06/14/2023	\$329.00	\$329.00	Unpaid
05/30/2023	3475			Brush Hill Plaza	1232 W. Ogden Ave., Naperville, IL, 60563		\$250.00	\$250.00	Unpaid
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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	3470	2822	2823	Camp Rock	400 S 4th Street, Unit 1000M, Minneapolis, Minnesota, 55415		\$916.00	\$916.00	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	3468			Camp Rock	400 S 4th Street, Unit 1000M, Minneapolis, Minnesota, 55415	08/24/2023	\$1,206.86	\$1,206.86	Unpaid
05/26/2023	3467			Anderson Lawn Maintenance Inc	5605 Town Hall Drive, Loretto, MN, 55357		\$2.50	\$2.50	Unpaid

After clicking on Receive Payments, all invoices from this customer will be seen as well.

**Put a checkmark on the invoice that the customer is ready to pay and select a payment method.**

Click on Save and the **invoice status will change to PAID**.

Customer: ABC Company

Payment Date: 5/30/2023

Payment Method: Cash

Amount Received: \$ 329

Description	Due Date	Origin	Open Balance	Payment
<input checked="" type="checkbox"/> Invoice #3477 (06/13/2023)	06/13/2023	\$329.00	\$0.00	329
<input type="checkbox"/> Invoice #1231		\$956.00	\$956.00	
<input type="checkbox"/> Invoice #1237		\$1,440.00	\$1,440.00	
<input type="checkbox"/> Invoice #1238		\$670.00	\$670.00	
<input type="checkbox"/> Invoice #1239		\$1,155.00	\$1,155.00	

Amount to Apply: \$329.00

Amount to Credit: \$0.00

Buttons: CLOSE, SAVE

the Invoice Status will change to PAID once the payment is received.

IndusTrack

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SCHEDULE

INVOICES

TIMESHEET

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Search

Q

Date (from/to):

Choose a date From

Choose a date To

All

Unpaid

Overdue

Paid

CLEAR FILTER

+ ADD NEW

More Actions

<input type="checkbox"/>	Date ↓	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
<input type="checkbox"/>	05/30/2023	3477			ABC Company	400 S 4th St, , Suite 1000M, Minneapolis, MN, 55415	06/14/2023	\$0.00	\$329.00	<div>Paid</div>