

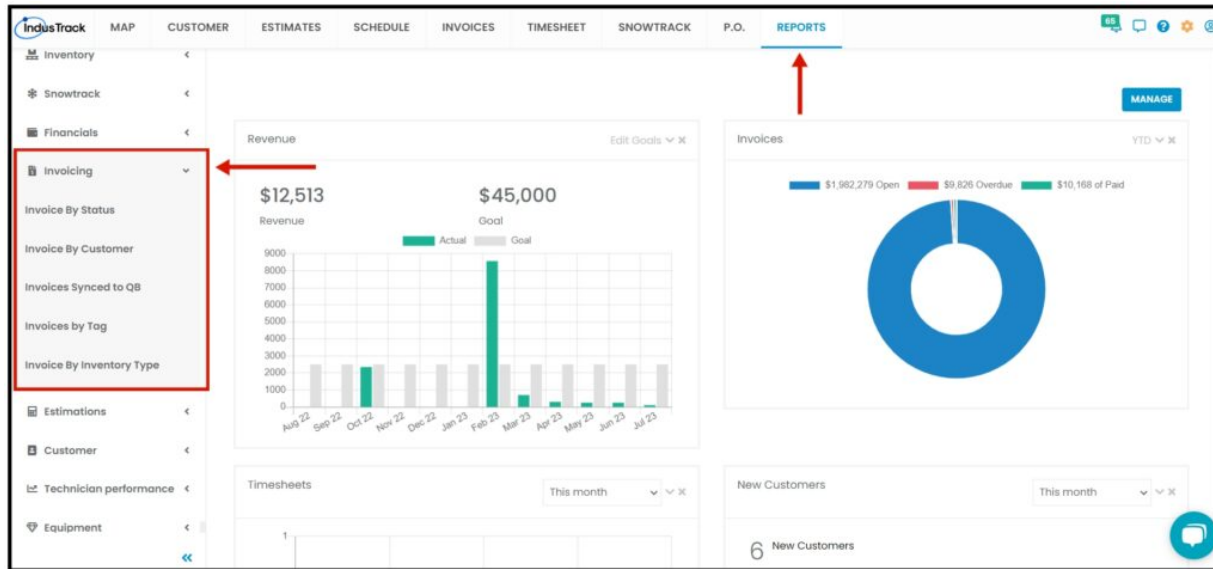
Invoicing Report

Invoicing reports provide a detailed summary of all the issued invoices over a specific period of time. These reports help your business track and manage your financial transactions, monitor sales, and analyze revenue generation. Invoicing reports typically include information such as invoice number, customer details, payment terms, invoice date, due date, amount owed, and payment status. By reviewing these reports, businesses can gain insights into their cash flow, outstanding payments, customer payment patterns, and overall financial health.

To access Invoicing Report, click on the **REPORTS Module** on the left-hand side and click on **Invoicing**.

A drop-down option will show its subcategories for the reports you want to see:

- Invoice By Status
- Invoice By Customer
- Invoices Synced to QB
- Invoices by Tag
- Invoice By Inventory Type

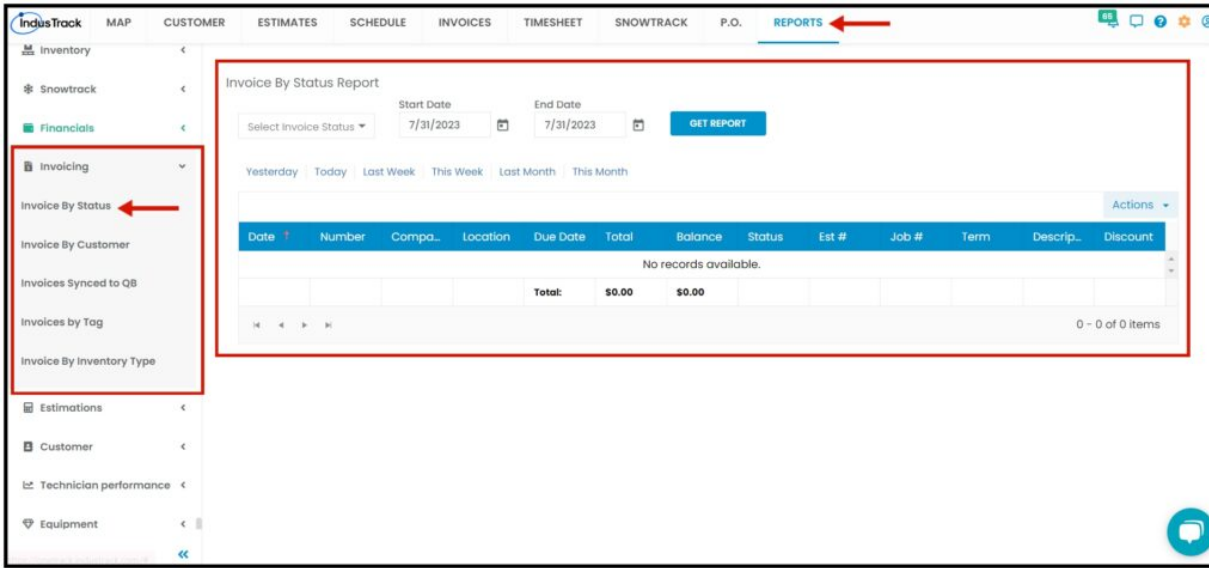


Invoice By Status

In this Report, you will be able to generate each of the statuses of the invoices such as:

- Unpaid
- Overdue
- Paid
- Sent
- Viewed
- Partially Paid

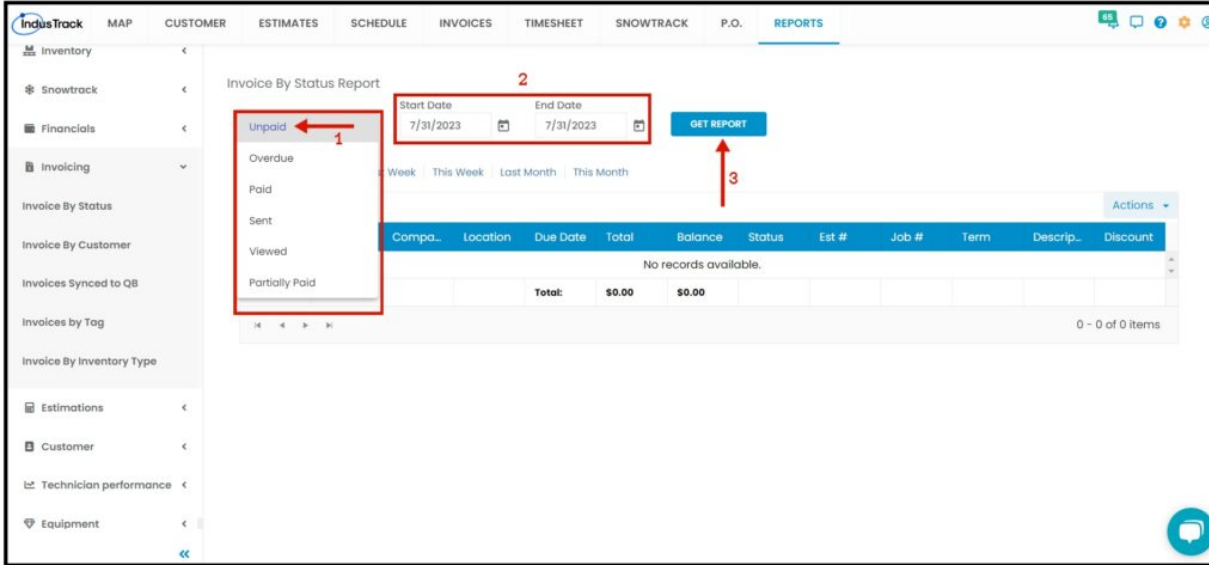
To view the Invoice By Status Report, go to **Reports** Menu on the top > Click **Invoicing** > on the drop-down click **Invoice By Status**.



Generate Invoice By Status Report

You can filter the report by the following:

1. Status– Which status you would like to generate
 - o Unpaid, Overdue, Paid, Sent, Viewed, Partially Paid
 - o You can only select one status each time.
2. Date/s – specific date of the report
 - o Select the **start date** and **end date**
3. After you selected the status and the start and end date, click on **Get Report**.



- Alternatively, you can also select a period rather than selecting a specific date:
 - o Yesterday | Today | last Week | This Week | Last Month | This Month

Invoice By Status Report

Unpaid ▼ Start Date 7/31/2023 End Date 7/31/2023 GET REPORT

Yesterday Today Last Week This Week Last Month This Month

After we click on Get Report, we can now export the Invoice By Status into **Excel or PDF format** by clicking on the **Actions Button**.

Actions Button

- Export to PDF
- Export to Excel
- Configure Report Columns
- Schedule Report
- Add to Favorites

The screenshot shows the IndusTrack software interface. At the top, there are navigation tabs: MAP, CUSTOMER, ESTIMATES, SCHEDULE, INVOICES, TIMESHEET, SNOWTRACK, P.O., and REPORTS. The 'REPORTS' tab is active. Below the navigation, the 'Invoice By Status Report' page is displayed. It includes a filter for 'Unpaid', start and end dates set to '7/1/2023', and a 'GET REPORT' button. Below the filter, there are tabs for 'Yesterday', 'Today', 'Last Week', 'This Week', 'Last Month', and 'This Month'. The main content is a table with columns: Date, Number, Company, Location, Due Date, Total, Balance, Status, Est #, Job #, and Term. The table contains three rows of data and a total row. An 'Actions' dropdown menu is open on the right side of the table, with a red box highlighting the 'Export to PDF' and 'Export to Excel' options.

Date	Number	Company	Location	Due Date	Total	Balance	Status	Est #	Job #	Term
07/11/2023	5375	Sky Ranch Tagaytay	8401 Elliot Ave S, Minneapolis, Minnesota, 55420	08/10/2023	\$3.21	\$3.21	Unpaid			Net 30
07/12/2023	5376	Sky Ranch Tagaytay	Location 2, 10700 Hwy 55 W, Plymouth, Minnesota, 55441	08/11/2023	\$993.86	\$493.86	Partially Paid			net 30 real
07/20/2023	5377	2 wheels club	71 A Lopez St, Cebu, PH, 39746		\$174.60	\$88.60	Partially Paid	270		Various Remediatio...
		2 wheels	71 A Lopez St,				Partially			\$0.00
Total:					\$3,017.58	\$2,348.58				

Export Report

- Click on **export to Excel** or **export to PDF** to download the report to your computer. Either way, you can completely see the details in the report.

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

Invoice By Status Report

Unpaid Start Date 7/1/2023 End Date 7/31/2023 GET REPORT

Yesterday Today Last Week This Week Last Month This Month

Date	Number	Company	Location	Due Date	Total	Balance	Status	Est #	Job #	Term	Actions
07/11/2023	5375	Sky Ranch Tagaytay	8401 Elliot Ave S, Minneapolis, Minnesota, 55420	08/10/2023	\$3.21	\$3.21	Unpaid			Net 30	Export to PDF Export to Excel Configure Report Columns Schedule Report Add to Favorites
07/12/2023	5376	Sky Ranch Tagaytay	Location 2, 10700 Hwy 55 W, Plymouth, Minnesota, 55441	08/11/2023	\$993.86	\$493.86	Partially Paid			net 30 real	Replaceme... \$U.UU
07/20/2023	5377	2 wheels club	71 A Lopez St, Cebu, PH, 39746		\$174.60	\$88.60	Partially Paid	270		Various Remediatio...	\$0.00
		2 wheels	71 A Lopez St,				Partially				
Total:					\$3,017.58	\$2,346.58					

1 - 9 of 9 items

Configure Report Columns

Enable or disable the columns on this report if you want to see them or not. When disabling the column/s, once you generate this report that specific column will be removed.

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

Invoice By Status Report

Unpaid Start Date 7/1/2023 End Date 7/31/2023 GET REPORT

Yesterday Today Last Week This Week Last Month This Month

Date	Number	Company	Location	Due Date	Total	Balance	Status	Est #	Job #	Term	Actions
07/11/2023	5375	Sky Ranch Tagaytay	8401 Elliot Ave S, Minneapolis, Minnesota, 55420	08/10/2023	\$3.21	\$3.21	Unpaid			Net 30	Export to PDF Export to Excel Configure Report Columns Schedule Report Add to Favorites
07/12/2023	5376	Sky Ranch Tagaytay	Location 2, 10700 Hwy 55 W, Plymouth, Minnesota, 55441	08/11/2023	\$993.86	\$493.86	Partially Paid			net 30 real	Replaceme... \$U.UU
07/20/2023	5377	2 wheels club	71 A Lopez St, Cebu, PH, 39746		\$174.60	\$88.60	Partially Paid	270		Various Remediatio...	\$0.00
		2 wheels	71 A Lopez St,				Partially				
Total:					\$3,017.58	\$2,346.58					

1 - 9 of 9 items

Uncheck columns you don't see in the Report. Click SAVE after configuring.

Edit Columns Settings



- Date
- Number
- Company
- Location
- Due Date
- Total
- Balance
- Status
- Est #
- Job #

CLOSE

SAVE

Schedule Report

You can also Automatically schedule a report on a specified frequency. Refer to Schedule Report Module.

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

Invoice By Status Report

Unpaid Start Date 7/1/2023 End Date 7/31/2023 GET REPORT

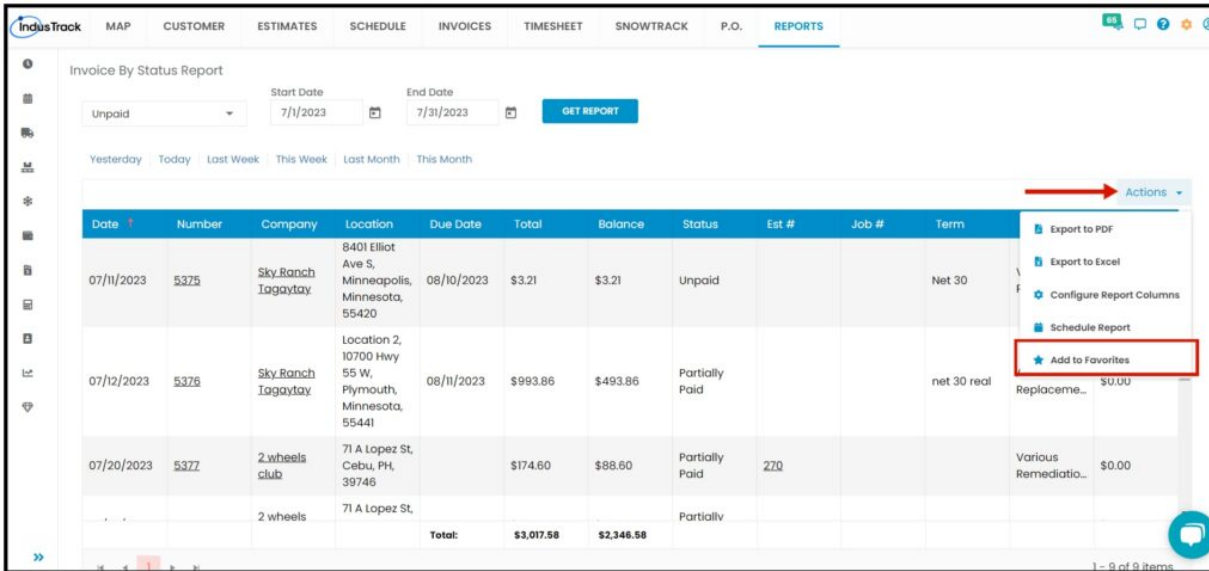
Yesterday Today Last Week This Week Last Month This Month

Date	Number	Company	Location	Due Date	Total	Balance	Status	Est #	Job #	Term	Actions
07/11/2023	5375	Sky Ranch Iagaytay	8401 Elliot Ave S, Minneapolis, Minnesota, 55420	08/10/2023	\$3.21	\$3.21	Unpaid			Net 30	Export to PDF Export to Excel Configure Report Columns Schedule Report Add to Favorites
07/12/2023	5376	Sky Ranch Iagaytay	Location 2, 10700 Hwy 55 W, Plymouth, Minnesota, 55441	08/11/2023	\$993.86	\$493.86	Partially Paid			net 30 real	Replaceme... \$0.00
07/20/2023	5377	2.wheels club	71 A Lopez St, Cebu, PH, 39746		\$174.60	\$88.60	Partially Paid	270		Various Remediatio...	\$0.00
		2 wheels	71 A Lopez St,				Partially				
Total:					\$3,017.58	\$2,346.58					

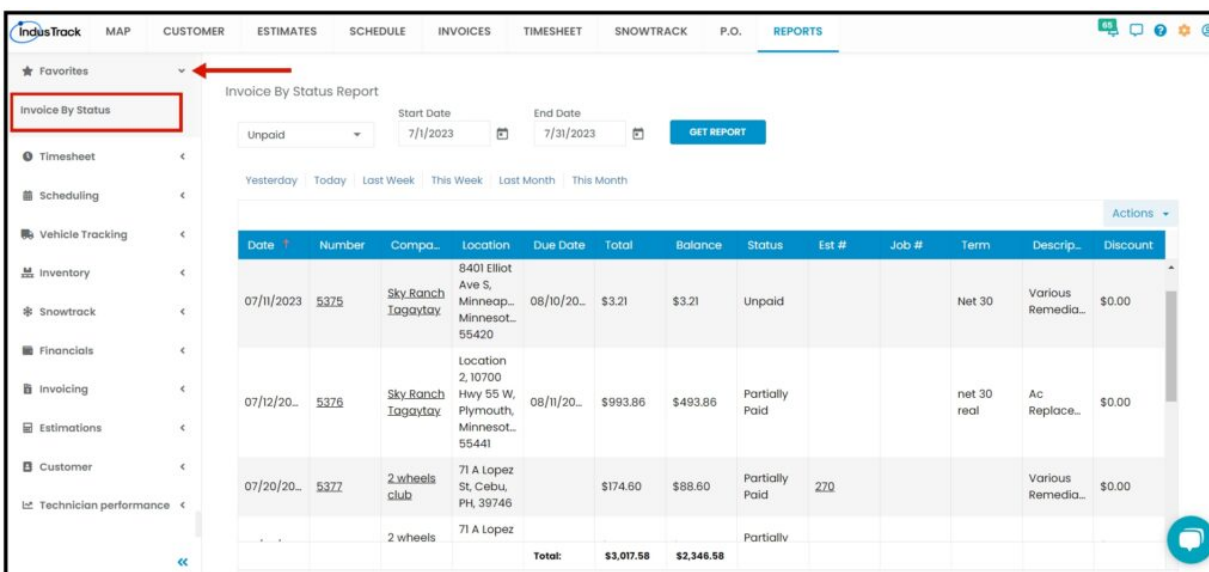
1 - 8 of 8 items

Add to Favorites

If you are frequently using this Report, you can select and Add it to your Favorites.



After you added a Report to **Favorites**, a **Favorite Tab** will be added at the top right of the left panel. All reports that are added to Favorite will be listed in the Top panel for easy access.

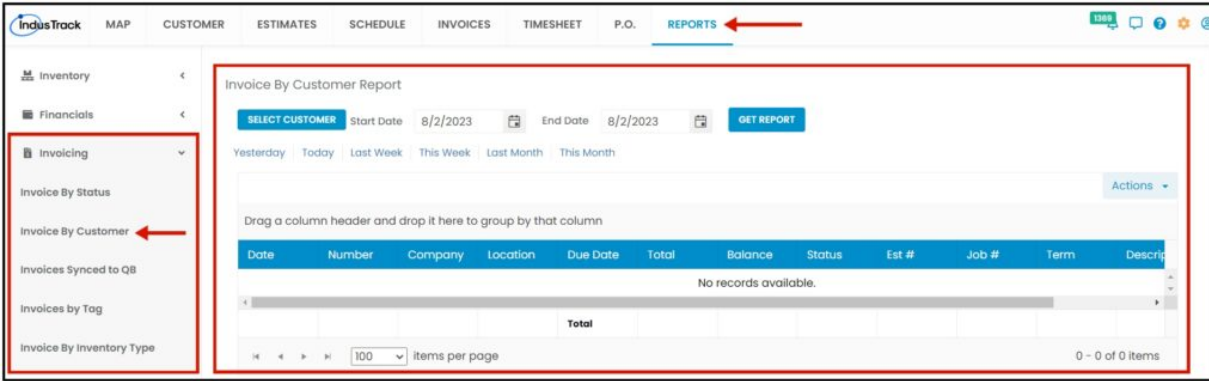


Invoice By Customer Report

You can find in this report the details of the customer and invoices:

- Date – Invoice created date
- Number – Invoice Number
- Company
- Location
- Due Date
- Total
- Balance
- Status – Invoice status
- Est # – If there is an estimate associated with the invoice.
- Job # – If there is a job associated with the invoice.
- Term
- Description
- Discount

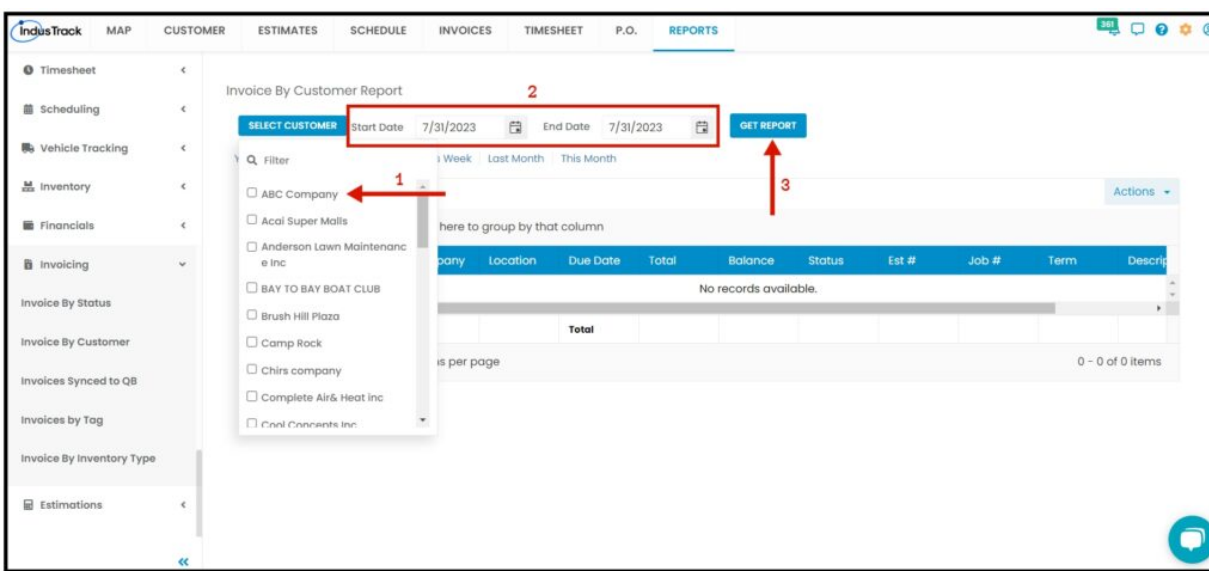
To view **Invoice by Customer Report**, go to **Reports** Menu on the top> Click **Invoicing**> on the drop-down click **Invoice by Customer Report**.



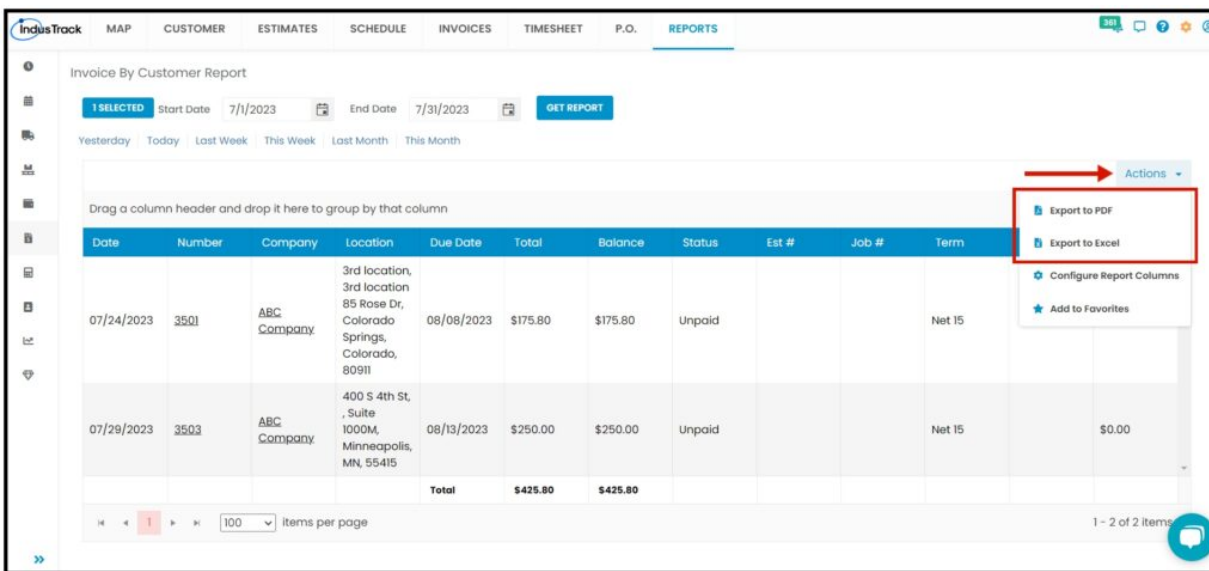
Generate Invoice By Customer Report

You can filter the report by the following:

1. Customer
 - o Click on **Select Customer**
 - o You can only select one customer at a time.
2. Date/s – The invoice created date.
 - o Select the **start date** and **end date**
3. After you selected the customer and the start and end date, click on **Get Report**.



After we click on Get Report, we can now export the Invoice By Customer Report into **Excel** or **PDF** format by clicking on the **Actions** Button and selecting **Export to PDF** or **Export to Excel**.



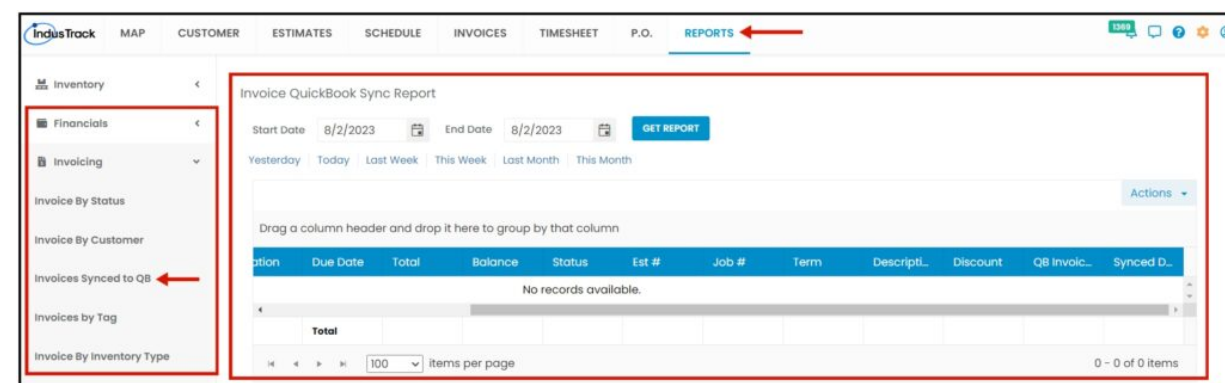
Invoices Synced to QB Reports

In this report, you will be able to see all of the invoices that were synced to Quickbooks.

You can find in this report the details of the customer and invoices and the details of the sync:

- Date – Invoice created date
- Number – Industrack Invoice Number
- Company
- Location
- Due Date
- Total
- Balance
- Status
- Est #
- Job #
- Tem
- Description
- Discount
- QB Invoice # – Invoice Number when synced to QB
- Synced Date – The date when the invoice was synced to QB

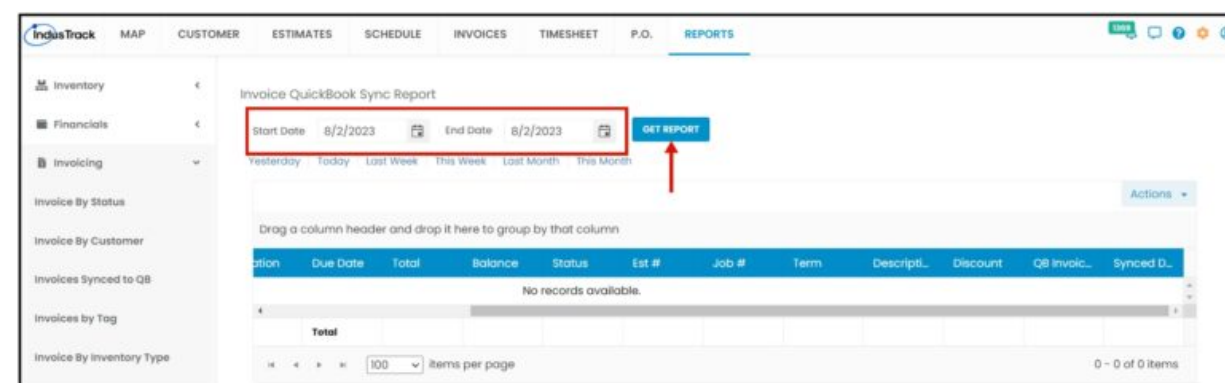
To view **Invoice Quickbooks Sync Report**, go to **Reports** Menu on the top> Click **Invoicing**> on the drop-down click **Invoice Quickbooks Sync Report**.



The screenshot shows the Industrack web interface. The top navigation bar includes 'MAP', 'CUSTOMER', 'ESTIMATES', 'SCHEDULE', 'INVOICES', 'TIMESHEET', 'P.O.', and 'REPORTS'. The 'REPORTS' menu is open, and the 'Invoicing' sub-menu is expanded. The 'Invoices Synced to QB' option is highlighted with a red arrow. The main content area shows the 'Invoice QuickBook Sync Report' with filters for 'Start Date' (8/2/2023) and 'End Date' (8/2/2023), and a 'GET REPORT' button. Below the filters, there is a table header with columns: 'Location', 'Due Date', 'Total', 'Balance', 'Status', 'Est #', 'Job #', 'Term', 'Descript...', 'Discount', 'QB Invoic...', and 'Synced D...'. The table currently displays 'No records available.' and a 'Total' row. The page footer shows '100 items per page' and '0 - 0 of 0 items'.

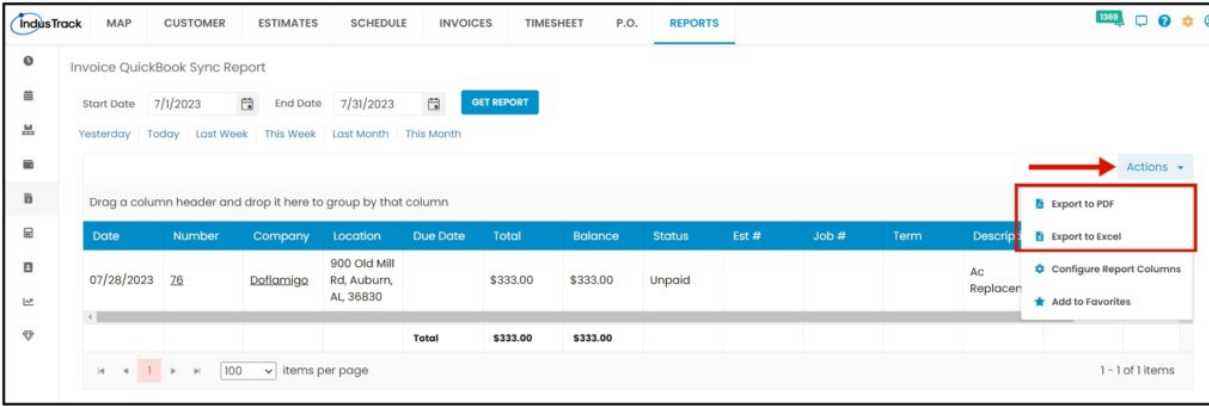
Generate Invoice By Quickbook Sync Report

Filter the report by **Start and End date** which is the date when the invoice was created and then click on **GET REPORT**.



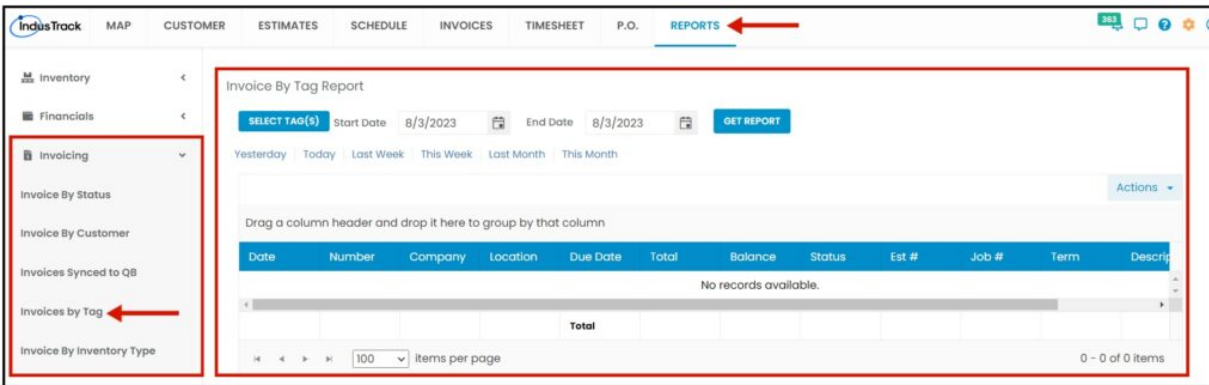
The screenshot shows the same Industrack web interface as the previous one. The 'Invoices Synced to QB' option is still selected. The 'GET REPORT' button is now highlighted with a red arrow. The rest of the interface, including the table header and 'No records available.' message, remains the same.

After we click on Get Report, we can now export the invoice Quickbook Sync Report into **Excel or PDF format** by clicking on the **Actions Button** and selecting **Export to PDF or Export to Excel**.



Invoice by Tag Report

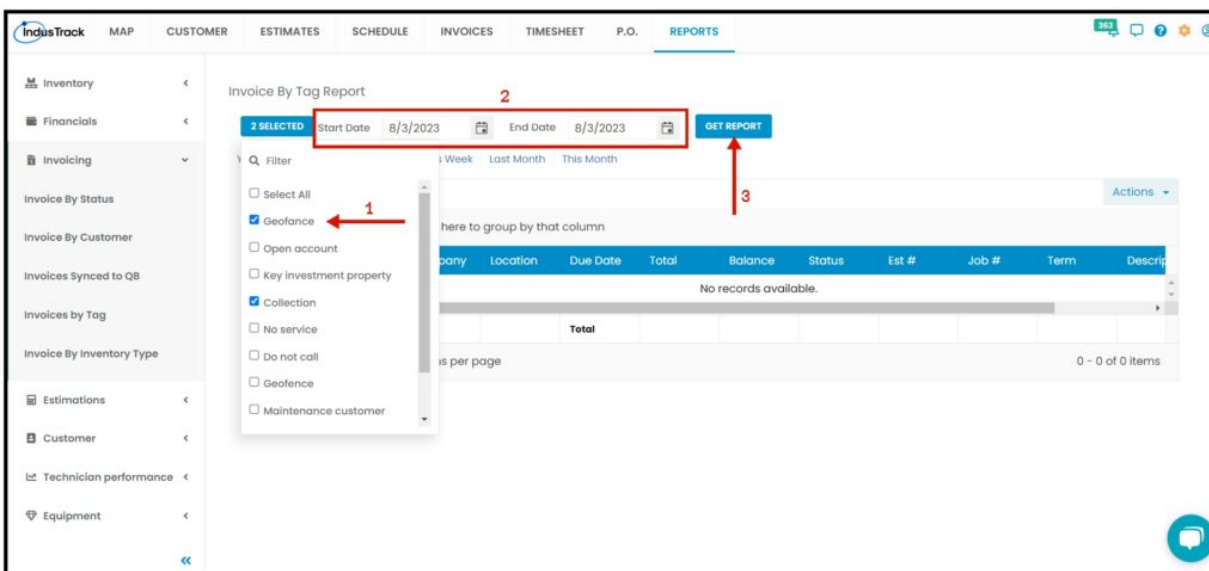
In this Report, you can generate invoices by their Tags. To view **Invoice By Tag Report**, go to **Reports** Menu on the top > click **Invoicing** > on the drop-down click **Invoice By Tag Report**.



Generate Invoice by Tag Report

You can filter the report by the following:

1. Tag/s –
 - o Click on **Select Tag/s**
 - o You have the option to either select one tag or multiple tags.
2. Date/s – The invoice created date.
 - o Select the **start date** and **end date**
3. After you selected the tag/s and the start and end date, click on **Get Report**.



After we click on Get Report, we can now export the Invoice By Tag Report into **Excel** or **PDF** format by clicking on the **Actions** Button and selecting **Export to PDF** or **Export to Excel**.

Invoice By Tag Report

Start Date: 7/1/2023 End Date: 7/31/2023 GET REPORT

Yesterday Today Last Week This Week Last Month This Month

Drag a column header and drop it here to group by that column

Date	Number	Company	Location	Due Date	Total	Balance	Status	Est #	Job #	Term
07/29/2023	3503	ABC Company	400 S 4th St, Suite 1000M, Minneapolis, MN, 55415	08/13/2023	\$250.00	\$250.00	Unpaid			Net 15
07/10/2023	3499	Walmart-Eden Prairie (52)	Walmart-Minnetonka, 19300 solid ave, Minnetonka, MN, 55301 3rd location, 3rd location		\$1,558.20	\$1,558.20	Unpaid	1239	2867	HVAC TEST TIME 123
Total					\$1,984.00	\$1,984.00				

100 items per page 1 - 3 of 3 items

Invoice by Inventory Type Report

In this Report, you can find detailed information on the Total amount of each Inventory Type added to the invoices by the customer/s:

- Invoice #
- Due Date
- Customer Name
- Services
- Inventory Item
- Non Inventory Item
- Inventory Equipment
- SubTotal
- Tax
- Total

To view **Invoice by Inventory Type Report**, go to **Reports** Menu on the top>Click **Invoicing**> on the drop-down click **Invoice by Inventory Type Report**.

REPORTS

Invoice By Inventory Type Report

SELECT CUSTOMER Start Date: 8/3/2023 End Date: 8/3/2023 GET REPORT

Yesterday Today Last Week This Week Last Month This Month

Drag a column header and drop it here to group by that column

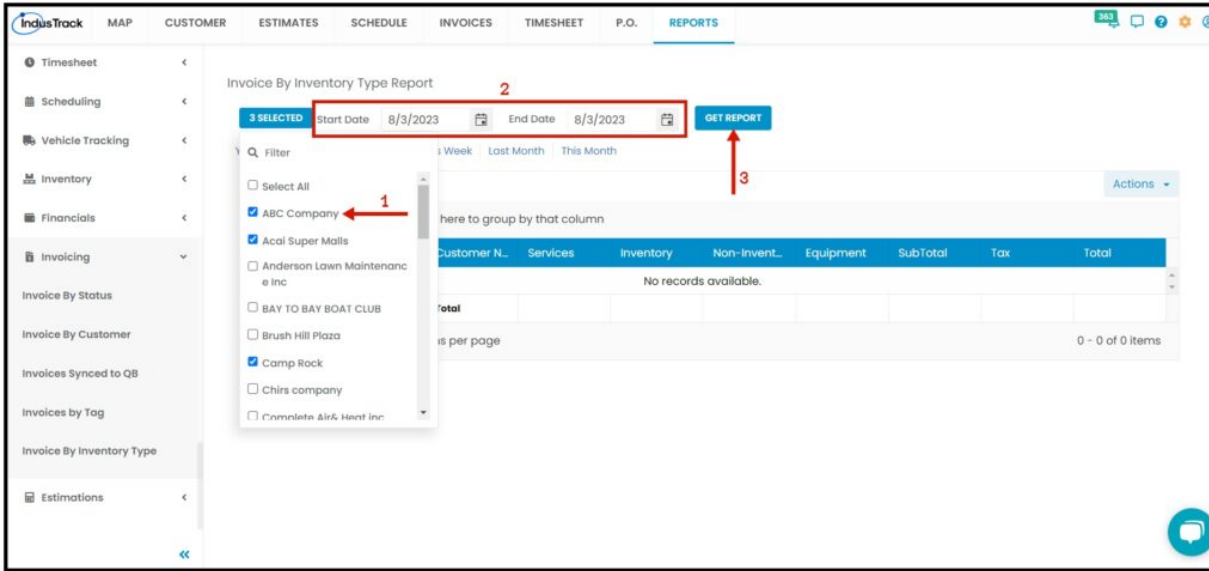
Inv. #	Due Date	Customer N...	Services	Inventory	Non-Invent...	Equipment	SubTotal	Tax	Total	
No records available.										
Total										

100 items per page 0 - 0 of 0 items

Generate Invoice By Inventory Type Report

You can filter the report by the following:

1. Customers –Name/s of Customer
 - Click on **Select Customer**
 - You have the option to either select one certain customer, multiple customers or select all customers.
2. Date/s – the job completion date.
 - Select the **start date** and **end date**
3. After you selected the customer/s and the start and end date, click **Get Report**.



After we click on Get Report, we can now export the **Invoice By Inventory Type Report** into **Excel** or **PDF** format by clicking on the **Actions Button** and selecting **Export to PDF** or **Export to Excel**.

