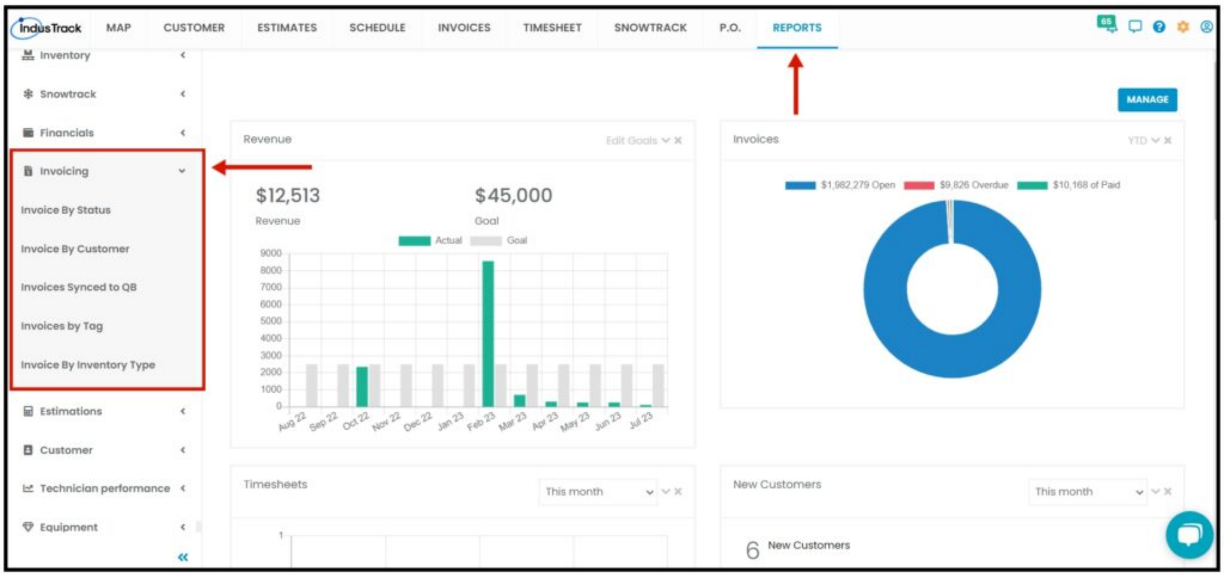
Invoicing Report

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

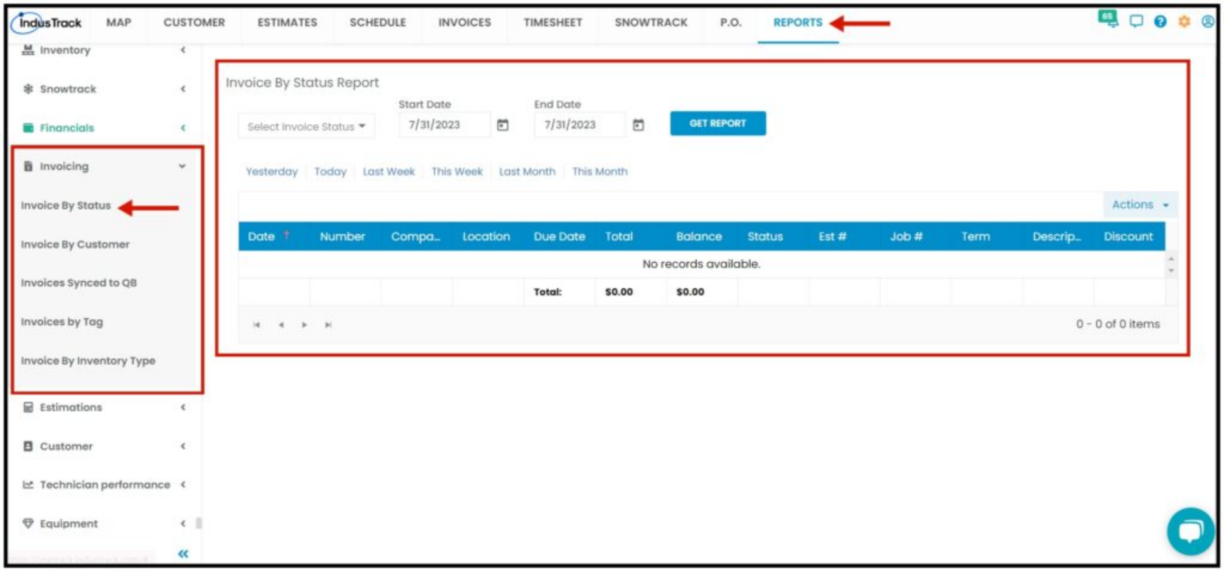


Invoice By Status

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

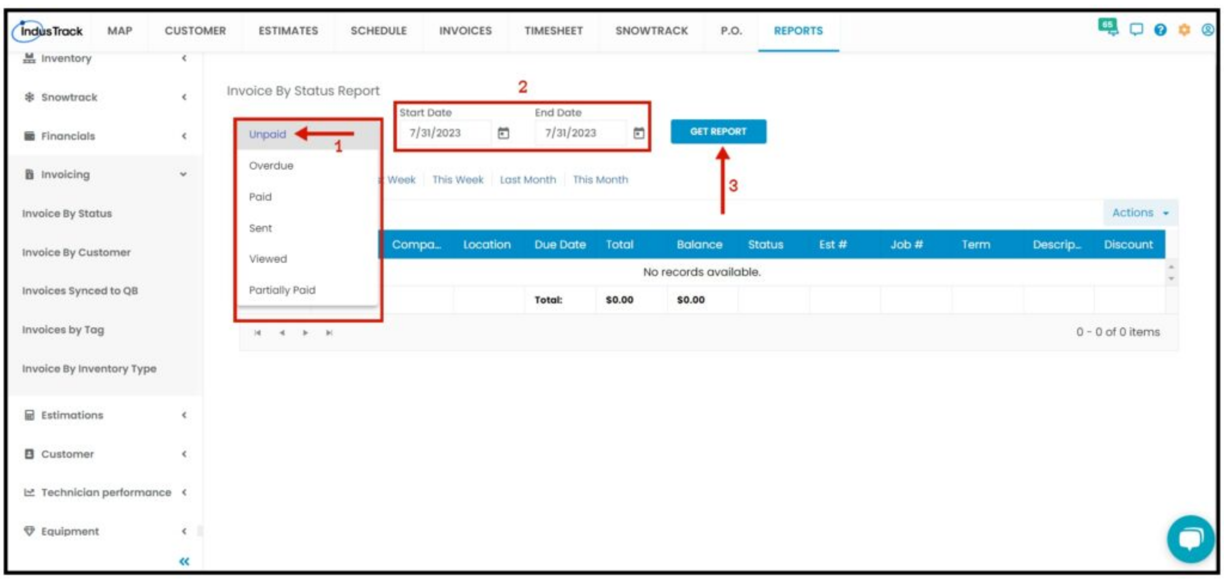
To view the Invoice By Status Report, go to **Reports** Menu on the top> Click **Invoicing**> on the drop-down click **Invoice By Status**.



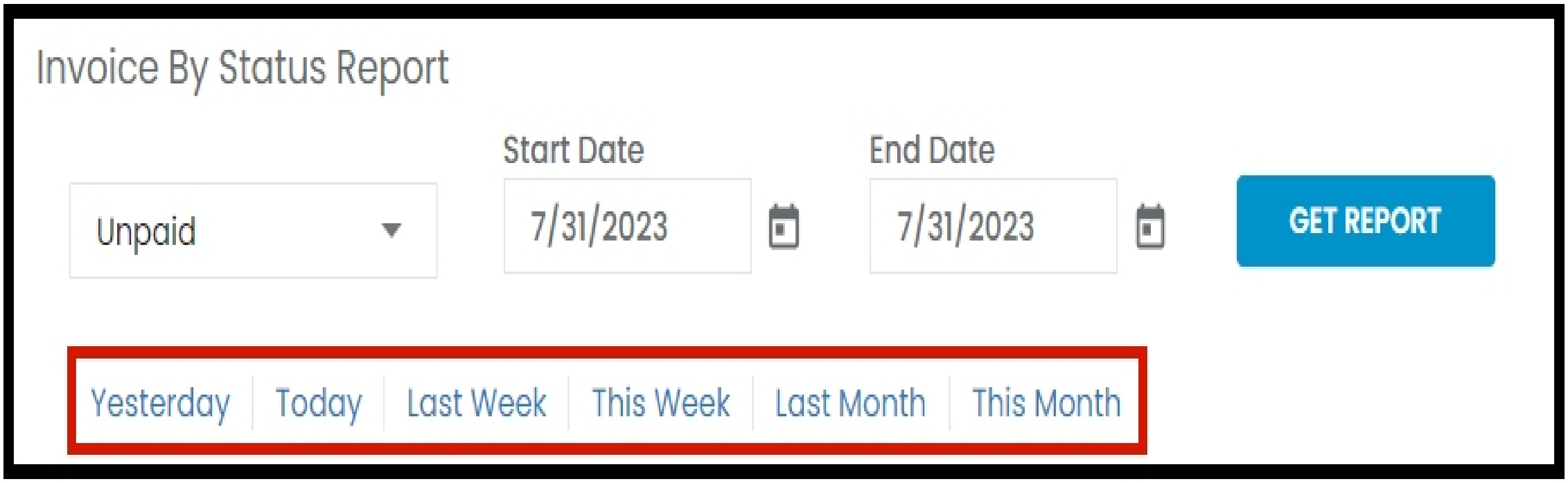
Generate Invoice By Status Report

You can filter the report by the following:

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



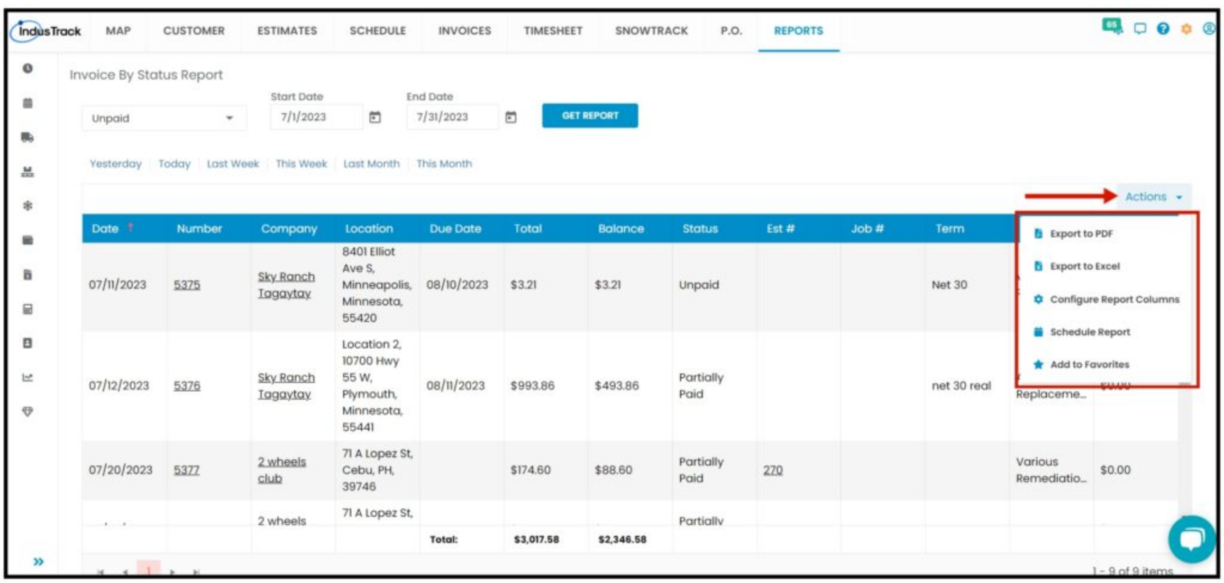
- Alternatively, you can also select a period rather than selecting a specific date:
    - *Yesterday* | *Today* | *last Week* | *This Week* | *Last Month* | *This Month*



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.**

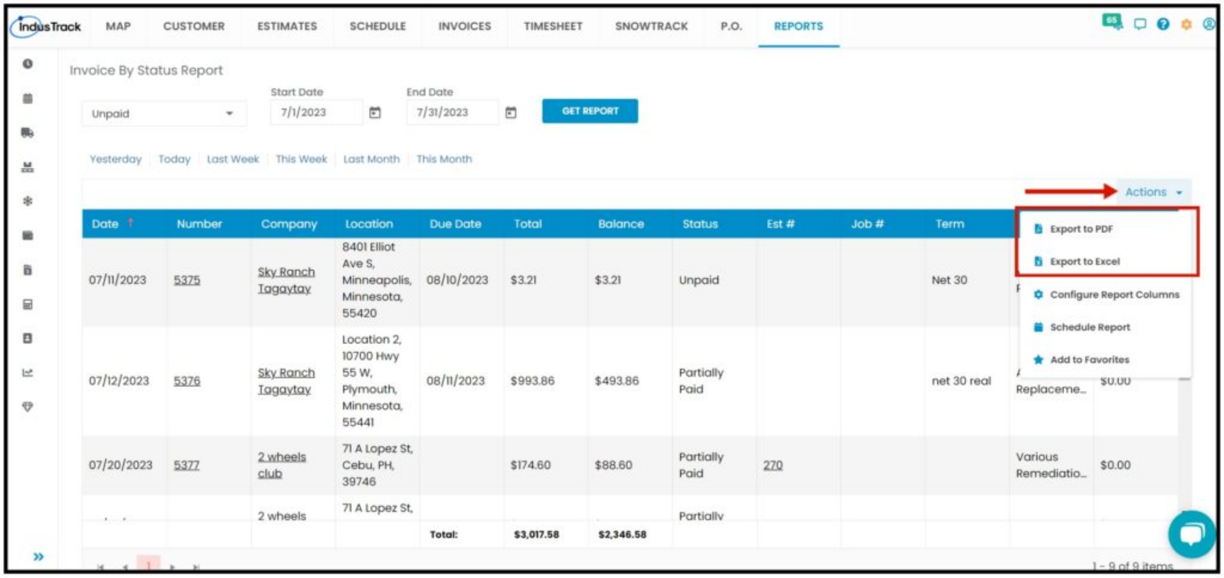
Actions Button

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



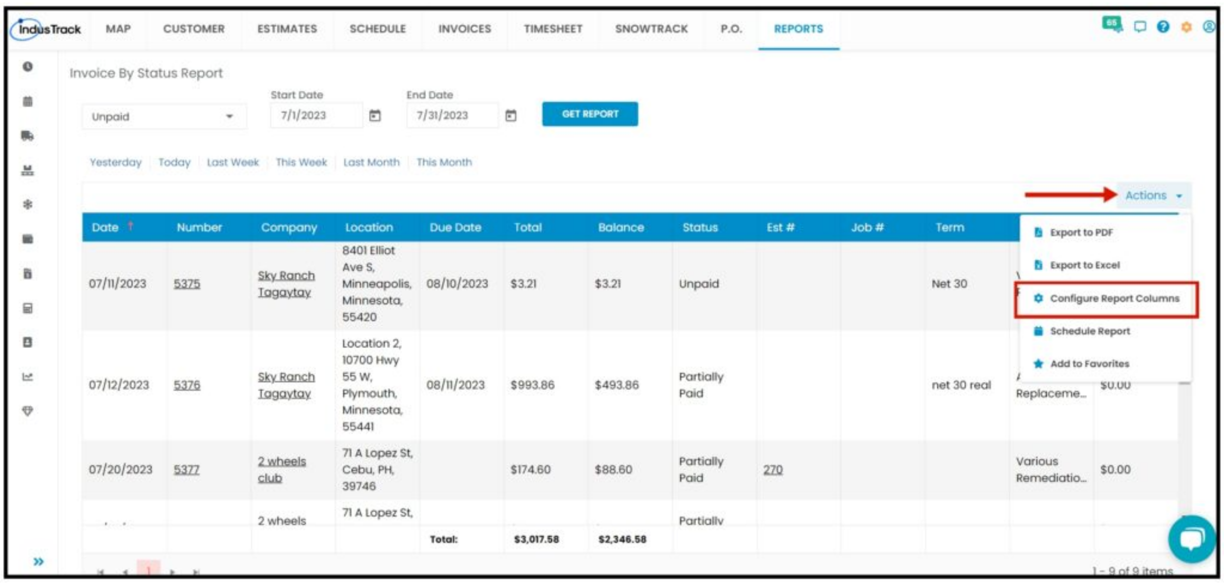
Export Report

- 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.

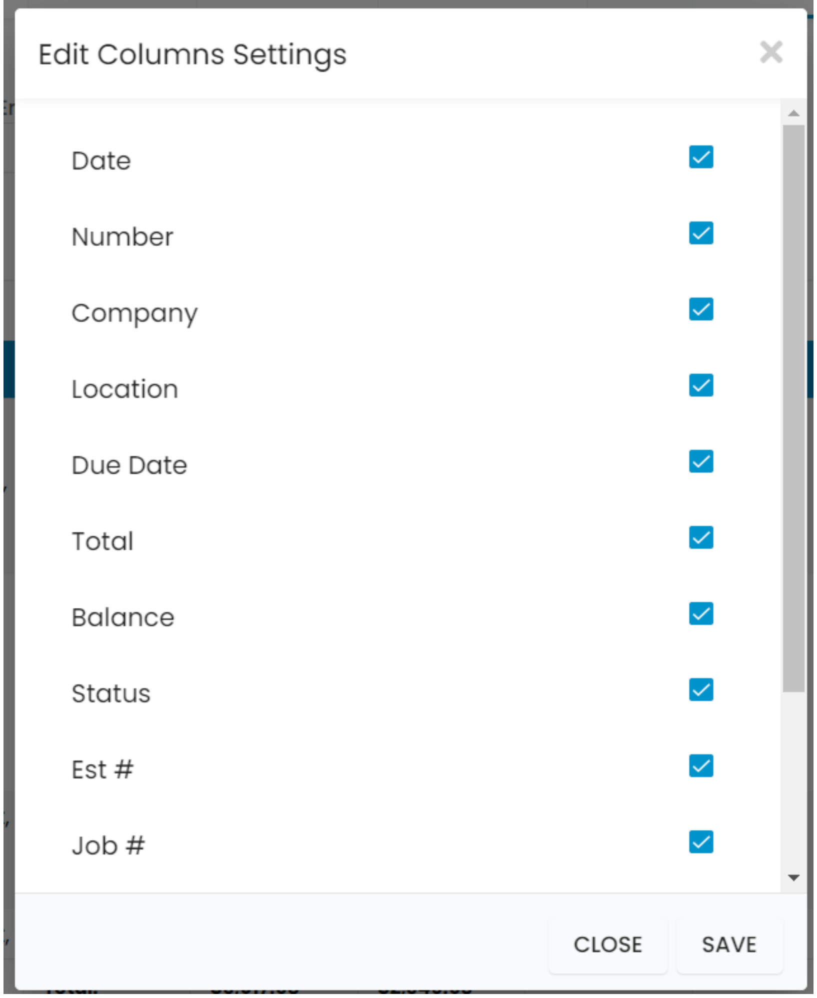


Configure Report Columns

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.

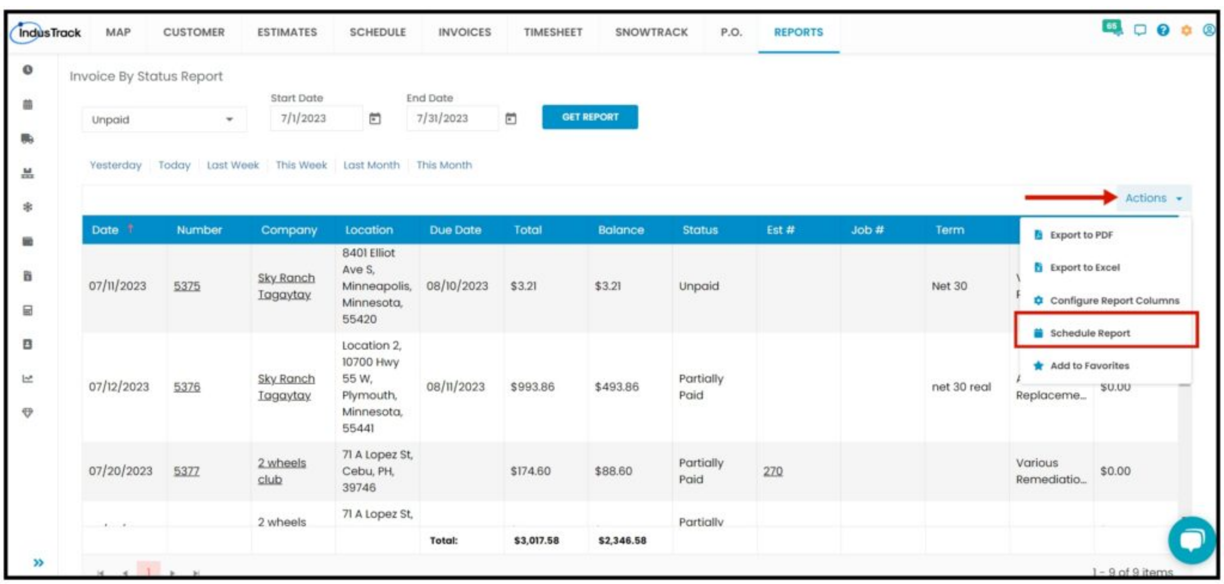


Uncheck columns you don’t want to see in the Report. Click SAVE after configuring.



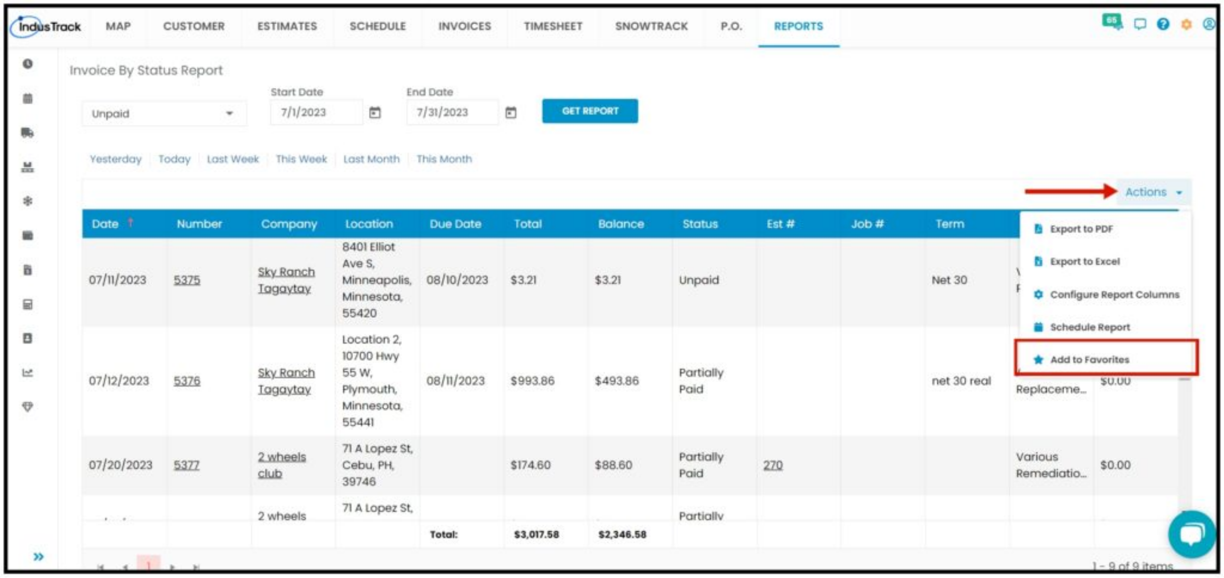
Schedule Report

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

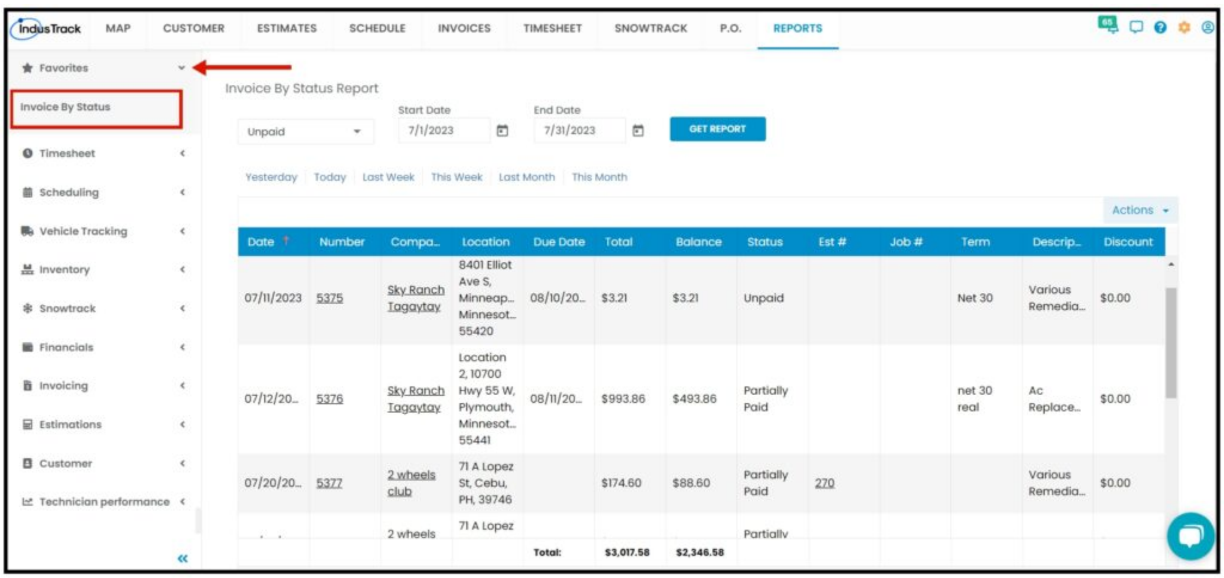


Add to Favorites

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.

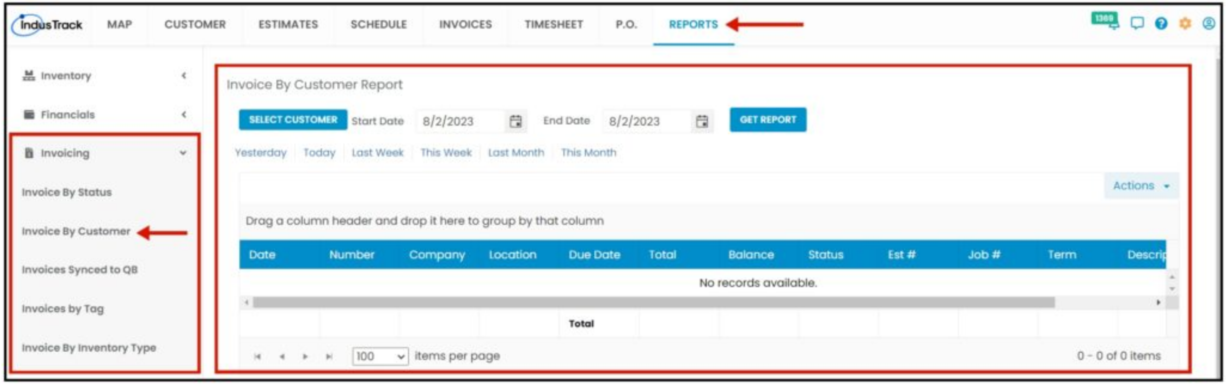


Invoice By Customer Report

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

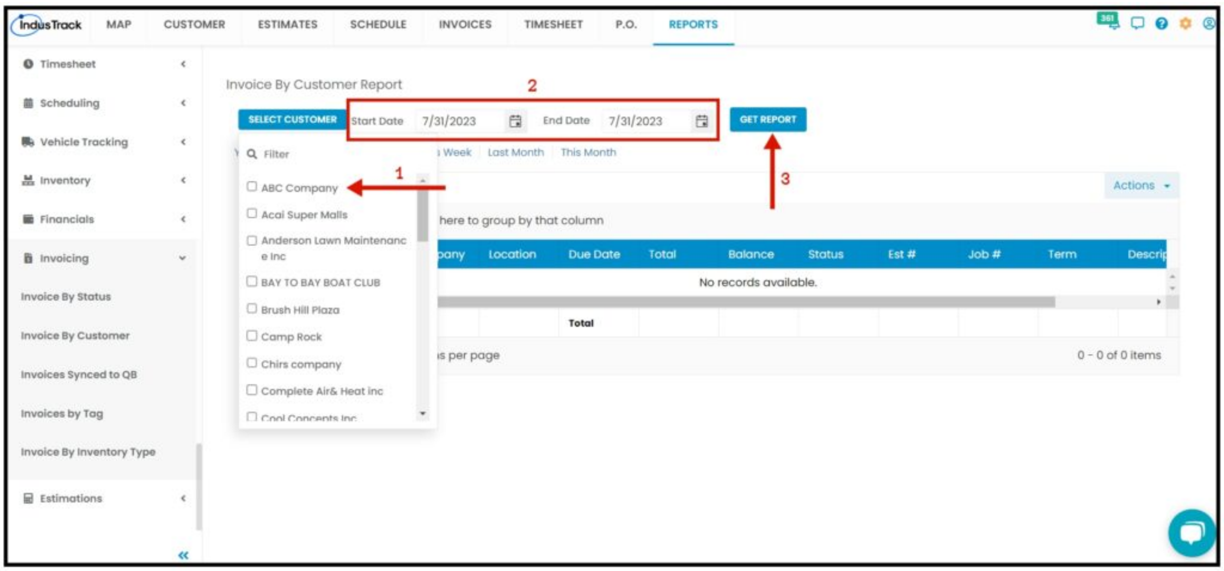
To view **Invoice by Customer Report**, go to **Reports** Menu on the top> Click **Invoicing**> on the drop-down click **Invoice by Customer Report**.



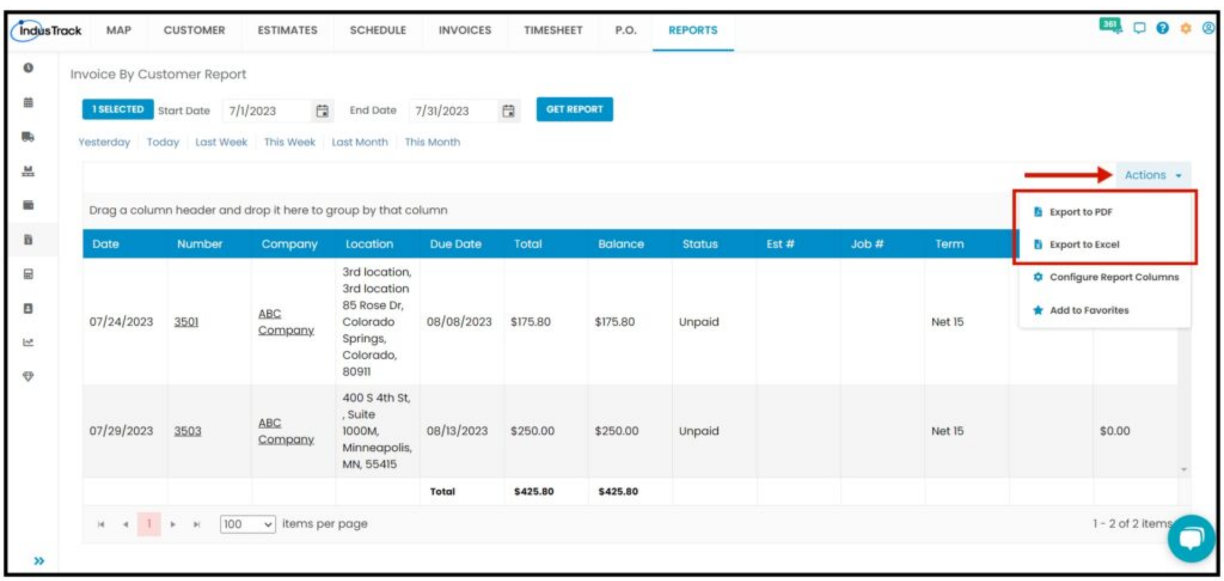
Generate Invoice By Customer Report

You can filter the report by the following:

1. Customer
   - Click on **Select Customer**
   - You can only select one customer at a time.
2. Date/s – The invoice created date.
   - 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.**



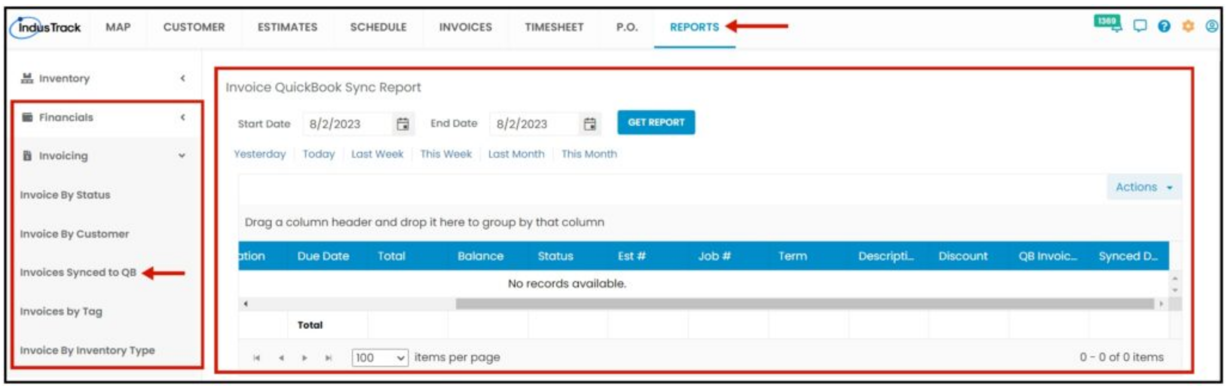
Invoices Synced to QB Reports

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:

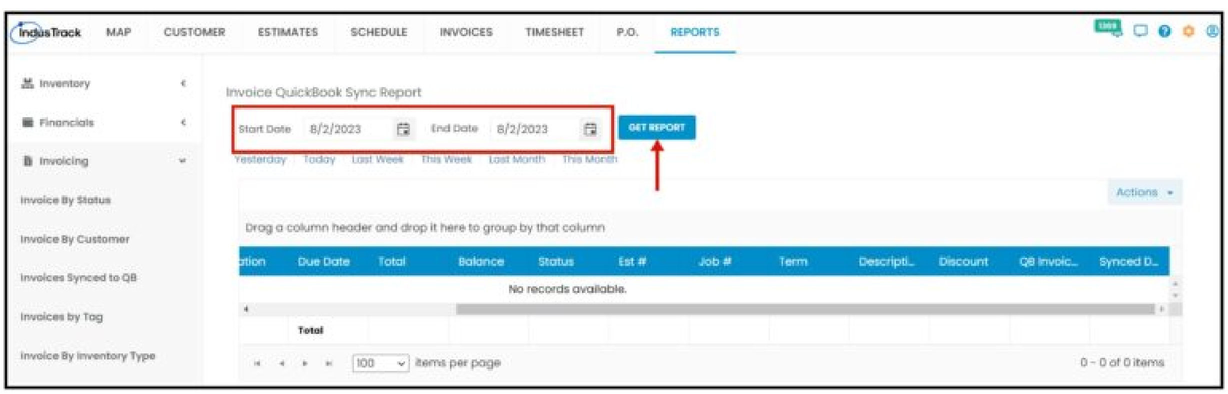
- Date – Invoice created date
- Number – Industrack Invoice Number
- Company
- Location
- Due Date
- Total
- Balance
- Status
- Est #
- Job #
- Tem
- Description
- Discount
- QB Invoice # – Invoice Number when synced to QB
- Synced Date – The date when the invoice was synced to QB

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

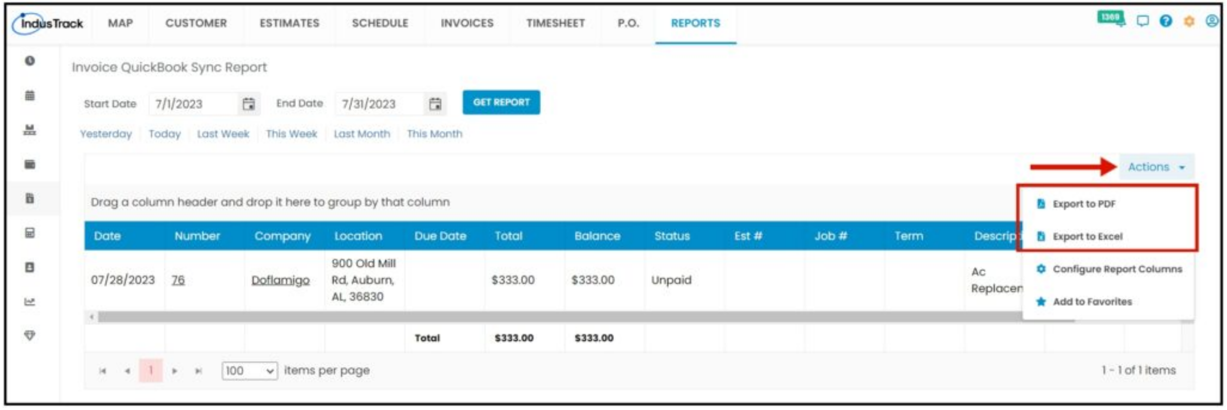


Generate Invoice By Quickbook Sync Report

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

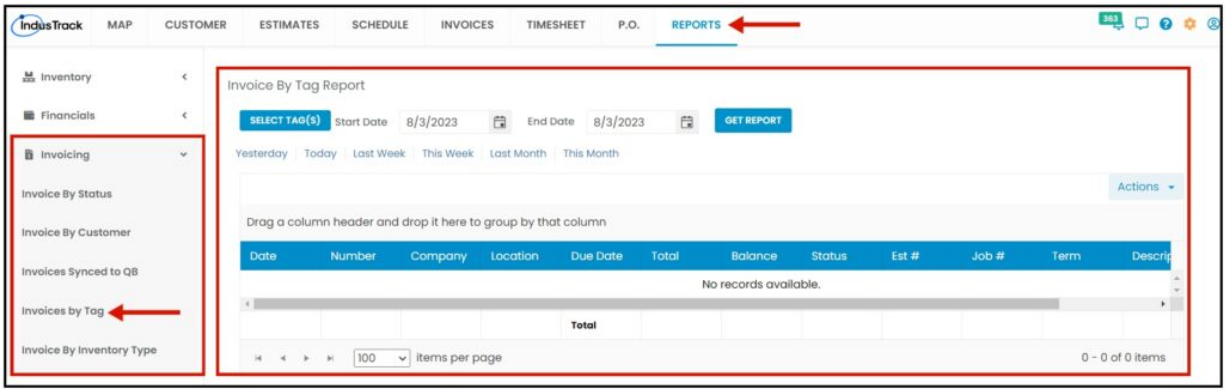


After we click on Get Report, we can now export the invoice Quickbook Sync Report into **Excel or PDF format** by clicking on the **Actions Button** and selecting **Export to PDF or Export to Excel.**



Invoice by Tag Report

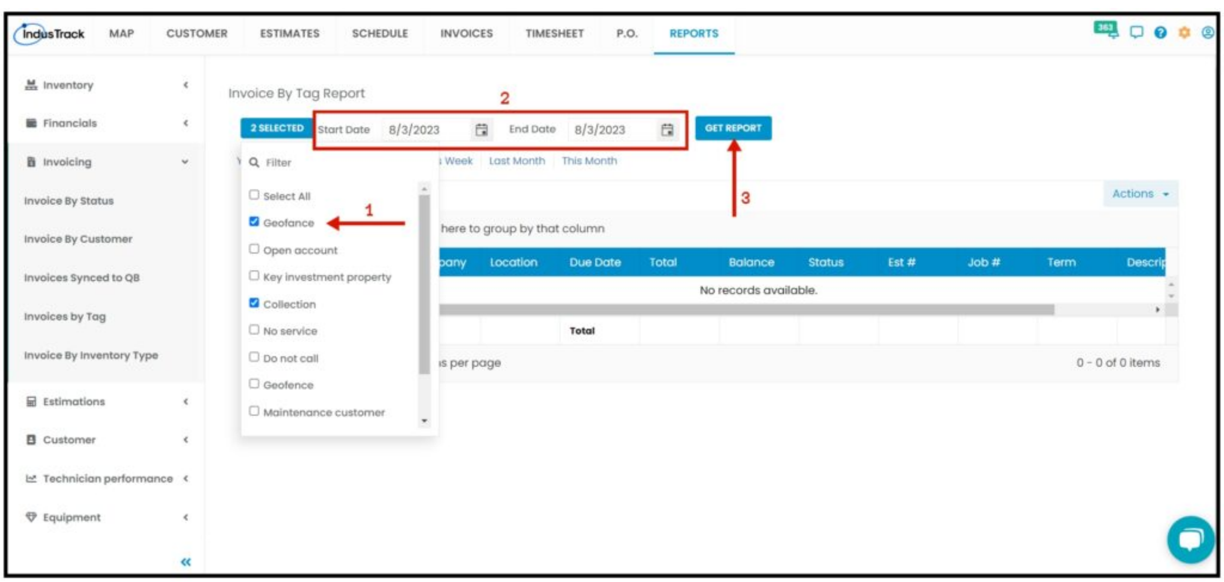
In this Report, you can generate invoices by their Tags. To view **Invoice By Tag Report**, go to **Reports** Menu on the top> click **Invoicing**> on the drop-down click **Invoice By Tag Report**.



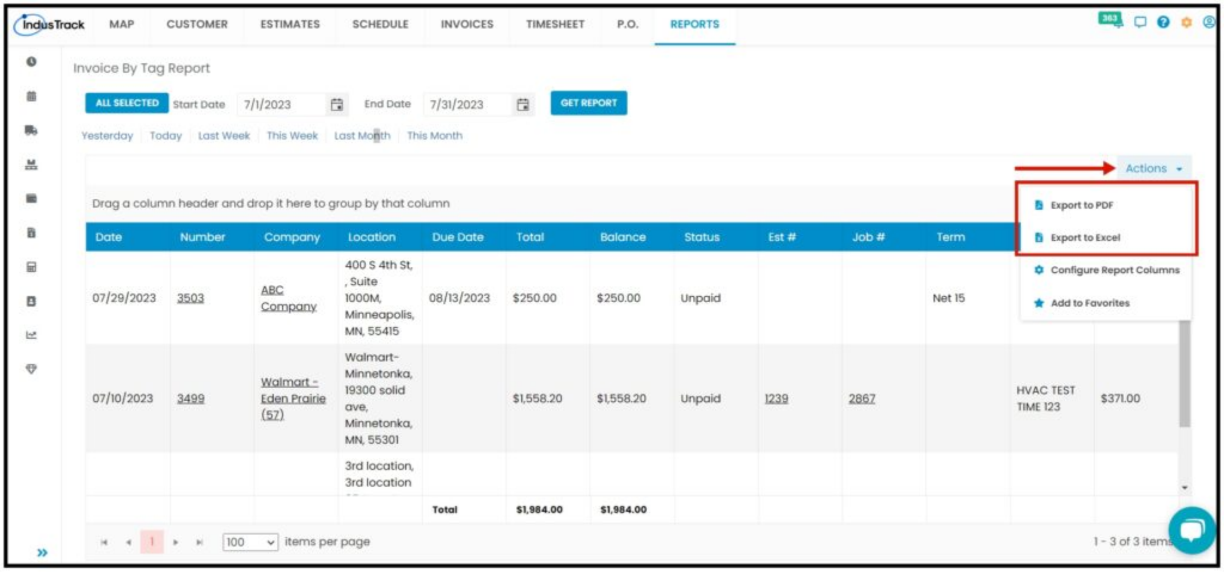
Generate Invoice by Tag Report

You can filter the report by the following:

1. Tag/s –
   - Click on **Select Tag/s**
   - You have the option to either select one tag or multiple tags.
2. Date/s – The invoice created date.
   - 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.**

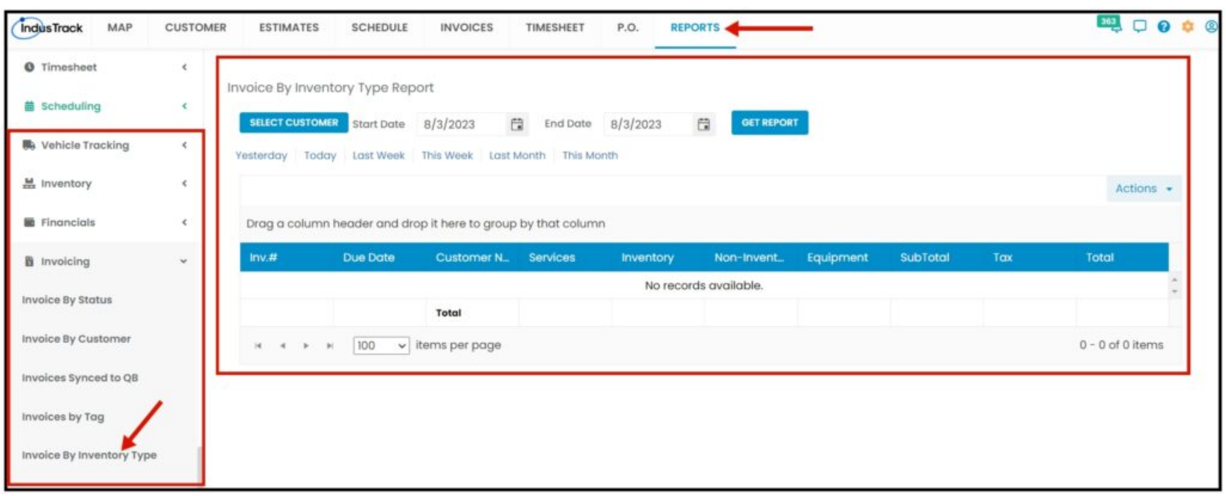


Invoice by Inventory Type Report

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

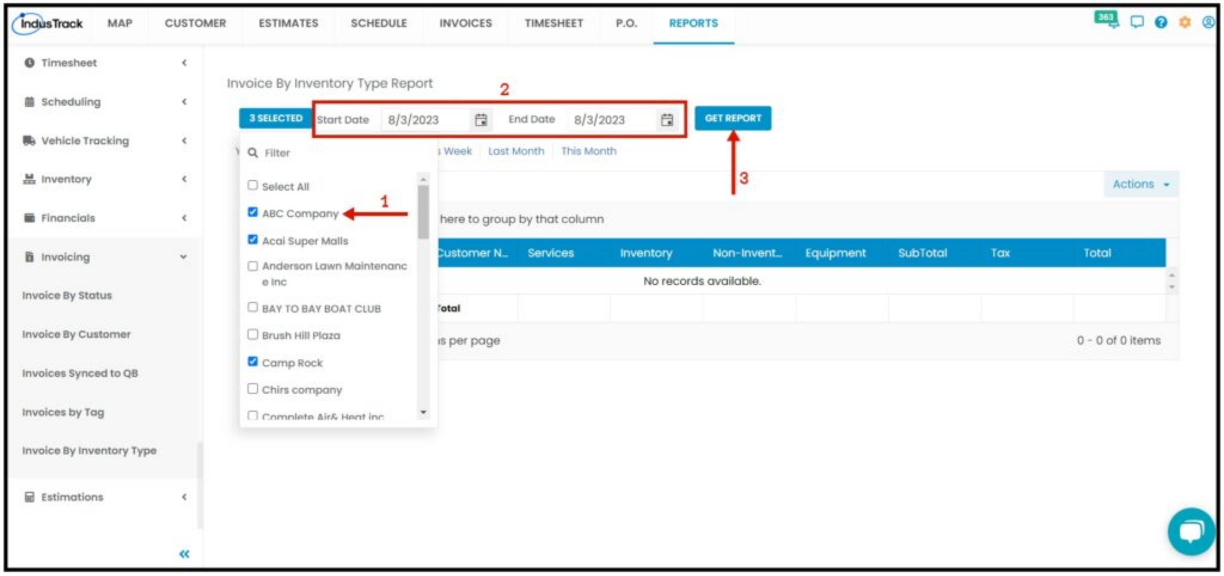
To view **Invoice by Invenotry Type Report**, go to **Reports** Menu on the top>Click **Invoicing**> on the drop-down click **Invoice by Invenotry Type Report**.



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 cutomer/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.**