

Invoicing

The Invoices module will allow you to view all your invoices and their statuses. You can even view the estimates and jobs associated with your invoices.

The screenshot shows the Invoices module interface. At the top, there are navigation tabs: MAP, CUSTOMER, ESTIMATES, SCHEDULE, **INVOICES**, TIMESHEET, SNOWTRACK, P.O., and REPORTS. Below the tabs is a summary dashboard with three cards: 'Last 30 Days' with a green checkmark and '\$ 2700.00', 'Overdue' with a red exclamation mark and '\$ 0.00', and 'Open Invoices' with '\$ 4008.70'. Below the dashboard is a search bar and a filter menu with options: All, Unpaid, Overdue, Paid, and CLEAR FILTER. To the right of the filter menu are buttons for '+ ADD NEW' and 'More Actions'. The main part of the interface is a table of invoices with the following columns: Date, Number, Est #, Job #, Company, Location, Due Date, Balance, Total, and Status. The table contains 10 rows of invoice data. The 'Status' column for all invoices is 'Unpaid'. The 'Due Date' column is highlighted with a red box in the second row. The 'View Estimate' and 'View Job Report' links in the 'Status' column of the second row are also highlighted with a red box.

Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
09/11/2023	5418		2701	5 Dollar Pizza	2331 108th Lane, Blaine, MN, 55449	10/11/2023	\$360.00	\$360.00	Unpaid
09/06/2023	5407	2689		2 wheels club	71 A Lopez St, Cebu, PH, 39746		\$180.00	\$180.00	Unpaid
09/06/2023	5406	2785		2 wheels club	71 A Lopez St, Cebu, PH, 39746		\$0.00	\$0.00	Unpaid
09/06/2023	5405	2784		2 wheels club	71 A Lopez St, Cebu, PH, 39746		\$0.00	\$0.00	Unpaid
09/04/2023	5404	372		Test Automation customer	Test street, Test City, aa, 00000		\$326.70	\$326.70	Unpaid
09/01/2023	5403	2775		2 wheels club	71 A Lopez St, Cebu, PH, 39746		\$180.00	\$180.00	Unpaid
09/01/2023	5402	2774		2 wheels club	arizona, 248 N Leandro Cir, Mesa, AZ, 5207		\$180.00	\$180.00	Unpaid
09/01/2023	5401	2773		2 wheels club	New York, 5 Frost Pond Rd, New Hyde Park, NY, 11040		\$180.00	\$180.00	Unpaid

The Due Date for an invoice, Remaining balance and total invoice amount will be displayed in separate columns.

This screenshot is identical to the one above, but with a red box highlighting the 'Due Date', 'Balance', and 'Total' columns in the table header. The 'Due Date' column is highlighted in the second row of the table.

You can quickly search for an invoice using the invoice number or company's name.

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

Last 30 Days
 Paid \$3600.00
 Overdue \$0.00
 Open Invoices \$4188.70

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
09/14/2023	5427	2809		2 wheels club	71 A Lopez St, Cebu, PH, 39746		\$180.00	\$180.00	Unpaid
09/11/2023	5418	2701		5 Dollar Pizza	2331 108th Lane, Blaine, MN, 55449	10/11/2023	\$360.00	\$360.00	Unpaid
09/06/2023	5407	2689		2 wheels club	71 A Lopez St, Cebu, PH, 39746		\$180.00	\$180.00	Unpaid
09/06/2023	5406	2785		2 wheels club	71 A Lopez St, Cebu, PH, 39746		\$0.00	\$0.00	Unpaid
09/06/2023	5405	2784		2 wheels club	71 A Lopez St, Cebu, PH, 39746		\$0.00	\$0.00	Unpaid
09/04/2023	5404	372		Test Automation customer	Test street, Test City, aa, 00000		\$326.70	\$326.70	Unpaid
09/01/2023	5403	2776		2 wheels club	71 A Lopez St, Cebu, PH, 39746		\$180.00	\$180.00	Unpaid

Click on the Unpaid, Overdue or Paid statuses to filter the list according to the selected status.

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

Last 30 Days
 Paid \$3600.00
 Overdue \$0.00
 Open Invoices \$4188.70

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
09/14/2023	5427	2809		2 wheels club	71 A Lopez St, Cebu, PH, 39746		\$180.00	\$180.00	Unpaid
09/11/2023	5418	2701		5 Dollar Pizza	2331 108th Lane, Blaine, MN, 55449	10/11/2023	\$360.00	\$360.00	Unpaid
09/06/2023	5407	2689		2 wheels club	71 A Lopez St, Cebu, PH, 39746		\$180.00	\$180.00	Unpaid
09/06/2023	5406	2785		2 wheels club	71 A Lopez St, Cebu, PH, 39746		\$0.00	\$0.00	Unpaid
09/06/2023	5405	2784		2 wheels club	71 A Lopez St, Cebu, PH, 39746		\$0.00	\$0.00	Unpaid
09/04/2023	5404	372		Test Automation customer	Test street, Test City, aa, 00000		\$326.70	\$326.70	Unpaid
09/01/2023	5403	2776		2 wheels club	71 A Lopez St, Cebu, PH, 39746		\$180.00	\$180.00	Unpaid

To view the invoices for a particular time frame, choose a date from the Date field.

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

Last 30 Days
 Paid \$3600.00
 Overdue \$0.00
 Open Invoices \$4188.70

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

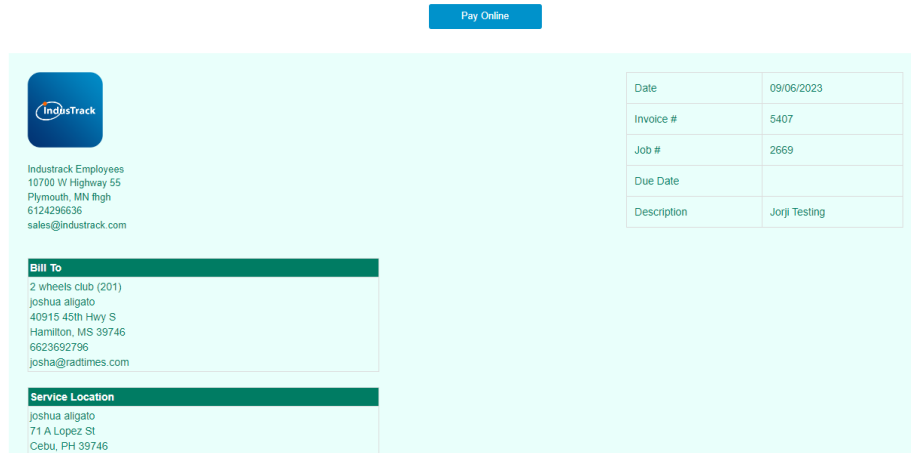
Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
09/14/2023	5427	2809		2 wheels club	71 A Lopez St, Cebu, PH, 39746		\$180.00	\$180.00	Unpaid
09/11/2023	5418	2701		5 Dollar Pizza	2331 108th Lane, Blaine, MN, 55449	10/11/2023	\$360.00	\$360.00	Unpaid
09/06/2023	5407	2689		2 wheels club	71 A Lopez St, Cebu, PH, 39746		\$180.00	\$180.00	Unpaid
09/06/2023	5406	2785		2 wheels club	71 A Lopez St, Cebu, PH, 39746		\$0.00	\$0.00	Unpaid
09/06/2023	5405	2784		2 wheels club	71 A Lopez St, Cebu, PH, 39746		\$0.00	\$0.00	Unpaid
09/04/2023	5404	372		Test Automation customer	Test street, Test City, aa, 00000		\$326.70	\$326.70	Unpaid
09/01/2023	5403	2776		2 wheels club	71 A Lopez St, Cebu, PH, 39746		\$180.00	\$180.00	Unpaid

To view payments received against your invoices, click More Actions and select View Payments.

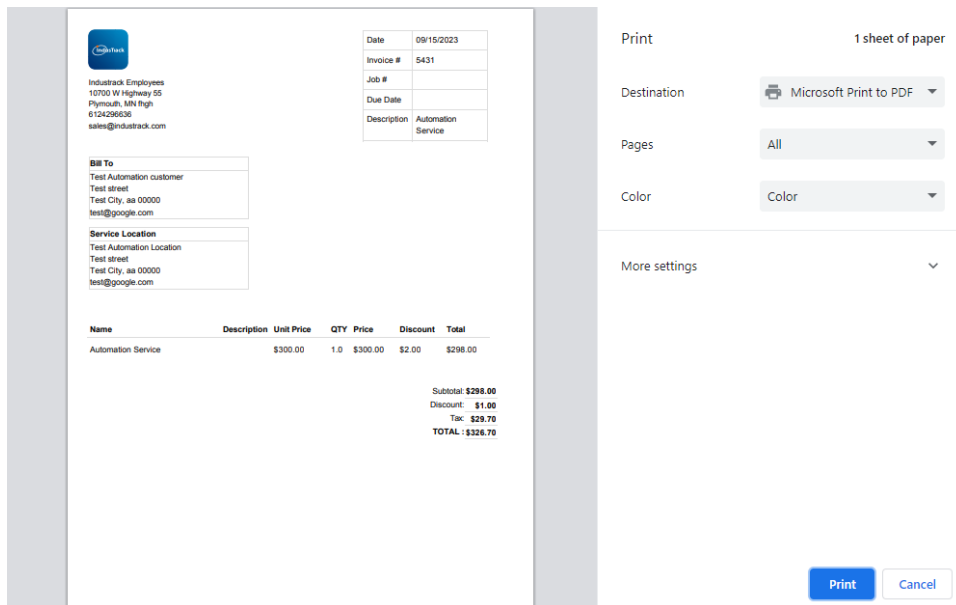
The Payments screen will let you view Invoice Numbers, Customer, Payment Method and Amount received against each invoice. Quickly search for a payment or enter the date range to view payments received between specific dates. Click 3 dots to edit the payment or delete a record.

Click on 3-dots at far-right for an invoice and a list of actions items will be displayed.

1. **Edit:** This option is used to make changes to an existing invoice.
2. **Copy/Clone:** Copy or clone an invoice using this option.
3. **Preview:** To view the look & feel of an invoice based on the template, select Preview option.
4. **Send:** This option is helpful in sending out an invoice to a customer. If you have Stripe integration set up in IndusTrack, your customers can enter the card information and pay online by clicking **Pay Online** button.



5. **Print:** This option is used to print out an invoice.



6. **View Estimate:** If an invoice was converted from an estimate, you can view that estimate. If the View Estimate option is greyed out, it means no estimate is associated with an invoice.

Estimate Edit X

Estimation Number: 410 **Invoiced** Actions ▾

Tags:

General: Description: <input type="text" value="Automation Service"/> Created: 09/13/2023 Proposal template: <input type="text" value="HVAC Maintenance Proposal"/>	Bill To: Test Automation customer Test street Test City, aa 00000 test@google.com	Service Location: Test street Test City, aa 00000 test@google.com	Estimation Summary: Total Cost: \$ 0.00 Total Price: \$ 326.70 Profit: Infinity %
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Pricebook Name	Category	Unit Price	Quantity	Price
<input type="text" value="Pricebook search"/>		\$	<input type="text" value="1"/>	\$

7. View Job Report: To view the detailed information about a job such as notes, attachments, parts, task details, view the job report. If View Job Report is greyed out, it means no job is associated with an invoice.

Job Detail Report Preview X

Job Number: 2809 Invoice #5427

Service Type:

Bill to 2 wheels club (201), 40915 45th Hwy S, Hamilton, MS, 39746	Service Location Main Location, 71 A Lopez St, Cebu, PH, 39746	Job Description timestamp test	Scheduled Date 09/14/2023 Scheduled Start Time 11:00 AM Est Duration 01:00
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Note
Test note works

Field Note
field notessss

Parts

Part Number	Name	Description	SN	Quantity
	1 1/2 Drive cover caplin	(Part)	44720	

CLOSE

8. Receive Payment: To receive payment against an invoice, select Receive Payment option. Checkmark the invoice(s) for which you would like to receive the amount. If you choose Card as a Payment Method, then your Stripe account must be integrated with Industrack to process the payment. Once you save the changes, the invoice will be marked as Paid.

Receive Payment

Customer: Test Automation customer
 Payment Date: 9/15/2023
 Payment Method: Cash (dropdown menu with options: Cash, Check, Card)
 Amount Received: \$ 326.7
 Reference #

Description	Due Date	Original Amount	Open Balance	Payment
<input checked="" type="checkbox"/> Invoice #5431		\$326.70	\$0.00	326.7
<input type="checkbox"/> Invoice #5404		\$326.70	\$326.70	

Items per page: 5 | 1 - 2 of 2

Memo:

Amount to Apply: \$326.70
 Amount to Credit: \$0.00

CLOSE SAVE

9. Delete: To remove an invoice, select Delete option.

The invoices can only be synced from Industrack to QuickBooks. Select the invoices that you would like to sync with QuickBooks, then click More Actions and choose **Mark for Sync** option.

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

Last 30 Days | Paid: \$0.00 | Overdue: \$0.00 | Open Invoices: \$0.00

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	View Payments
<input checked="" type="checkbox"/>	09/05/2023	3507		ABC Company	3rd location, 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911		\$0.00	\$0.00	Unpaid	Mark for Sync
<input checked="" type="checkbox"/>	09/05/2023	3506		ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$0.00	\$0.00	Unpaid	
<input checked="" type="checkbox"/>	08/07/2023	3504	1252	2873	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	\$362.28	\$362.28	Unpaid	
<input type="checkbox"/>	07/24/2023	3501		ABC Company	3rd location, 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911	08/08/2023	\$175.80	\$175.80	Overdue	
<input type="checkbox"/>	07/10/2023	3499	1239	2867	Walmart - Eden Prairie (57)	Walmart- Minnetonka, 19300 solid ave, Minnetonka, MN, 55301	\$1,558.20	\$1,558.20	Unpaid	

Select YES

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

Last 30 Days | Paid: \$0.00 | Overdue: \$0.00 | Open Invoices: \$0.00

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

Synchronization with QuickBooks!

Are you sure you want to synchronize selected record(s) with QuickBooks?

CANCEL YES

Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
<input checked="" type="checkbox"/>	09/05/2023	3507		ABC Company	3rd location, 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911		\$0.00	\$0.00	Unpaid
<input checked="" type="checkbox"/>	09/05/2023	3506		ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$0.00	\$0.00	Unpaid
<input checked="" type="checkbox"/>	08/07/2023	3504	1252	2873	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	\$362.28	\$362.28	Unpaid
<input type="checkbox"/>	07/24/2023	3501		ABC Company	3rd location, 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911	08/08/2023	\$175.80	\$175.80	Overdue
<input type="checkbox"/>	07/10/2023	3499	1239	2867	Walmart - Eden Prairie (57)	Walmart- Minnetonka, 19300 solid ave, Minnetonka, MN, 55301	\$1,558.20	\$1,558.20	Unpaid
<input type="checkbox"/>	08/28/2023	3498		ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415	07/11/2023	\$2,824.50	\$2,824.50	Overdue

After clicking YES, the status of invoices will change to **Ready for Sync**.

The screenshot shows the Industack interface with the following summary:

- Paid: \$ 2033.39
- Overdue: \$ 0.00
- Open Invoices: \$ 4007.13

The table below shows invoice details:

Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
08/15/2022				Basement Bar	511 N Washington Ave, Minneapolis, MN, 55401		\$235.66	\$235.66	Ready for Sync
08/15/2022	7			Basement Bar	88_1, 511 N Washington Ave, Minneapolis, MN, 55401		\$1,102.07	\$1,102.07	Ready for Sync
08/15/2022				A&L Chinese Restaurant	5800 Cahill Ave, Inver Grove Heights, MN, 55076		\$0.00	\$0.00	Paid
08/12/2022				2 wheels club	arizona, 248 N Leandra Cir, Mesa, AZ, 5207		\$90.15	\$90.15	Ready for Sync

Once the sync cycle is done and the invoices we marked for sync are already synced to QuickBooks, the status of the invoices in Industack will change back to Unpaid.

The screenshot shows the Industack interface with the following summary:

- Last 30 Days: \$ 0.00
- Overdue: \$ 0.00
- Open Invoices: \$ 0.00

The table below shows invoice details:

Date	Number	Est #	Job #	Company	Location	Due Date	Balance	Total	Status
09/05/2023	3507			ABC Company	3rd location, 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911		\$0.00	\$0.00	Unpaid
09/05/2023	3506			ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$0.00	\$0.00	Unpaid
08/07/2023	3504	1252	2873	ABC Company	400 S 4th St., Suite 1000M, Minneapolis, MN, 55415		\$362.28	\$362.28	Unpaid
07/24/2023	3501			ABC Company	3rd location, 3rd location 85 Rose Dr, Colorado Springs, Colorado, 80911	08/08/2023	\$175.80	\$175.80	Overdue sent 08/07/2023
07/10/2023	3499	1239	2867	Walmart - Eden Prairie (57)	Walmart- Minnetonka, 19300 solid ave, Minnetonka, MN, 55301		\$1,558.20	\$1,558.20	Unpaid

In QuickBooks, if you mark the invoices as paid then once the next sync cycle in Industack is completed the invoices will also get marked as Paid in Industack.