

















7. Invoicing:

In this step of the workflow, the customer will be billed for the job that has been done. To find a **list** of all leads that need to be billed, go to [Invoicing - New](#).

	Date	Status	Job Card ID	Job Card Number	Type	Contact Name	Contact Mobile	Date	Address	Sales Agent	
Leads 3	2017-03-30 12:23:46	Job Complete 2 months ago									   
Surveys 12	2017-04-06 03:49:36	Lead Abandoned 2 months ago	115		Installation			17 Mar 2017 : 08:00 - 09:00			   
Quotes 4	2017-05-19 14:38:42	Job Card Scheduled 10 days ago	363	JOB000341	Installation	test 1231	0731973137	05 May 2017 : 08:00 - 09:00	41 Kerk Street Kuils River Cape Town 7580 South Africa		   
Customers 4	2017-04-16	Job Complete	152	test242424242a	Installation	Change Me	011 1111111	15 Mar 2017 :	176 Bokser St, Akasia, 0201, South		   
Job Cards 133											
Invoicing											
New 8											

7.1. Creating the invoice:

To generate the draft invoice, click on the **green** hand found on the right hand side of the lead that you want to work on. Check to ensure that the details on the job card is correct and then click on the **“Generate Invoice”** button.

Edit Job Card #380
✕

Job No JOB000358

Customer [Customer Name]

Job Type Callout

Schedule Mon 29 May 2017 08:00 - 09:00 Team 3

Ticket No 710

[View Ticket](#)

Product Type	Product	Description	Qty	Chargeable	Serial Number	Incl Price	Total
Hardware	hpr - High Powered...	High Powered Router	1	Yes	Serial Number		
Call Outs	CALL001 - Standar...	Standard Call Out	1	Yes	Serial Number		

[+ Add Another Line](#)

Job Card Message

Total Discount R 0.00

Total Exclusive

Total VAT

Total

Close

Drop files here or click to upload

[Generate Invoice](#)

[Update](#)

After clicking on the **“Generate Invoice”** button a pop-up screen will appear. If you want to generate the invoice, click on the **“OK”** button. If you still need to amend the job card, click on the **“cancel”** button.

Create invoice from jobcard? ✕

Cancel

OK

Another pop-up screen will now appear confirming the successful invoice generation.

Invoice #2280 has been created successfully. ✕

OK

After clicking on the above “**OK**” button, you will see the following screen:

Edit Invoice #2285 ✕

Customer	<input type="text"/>	Pay Method	<input type="text" value="Direct D..."/>	Invoice Date	<input type="text" value="2017-05-30"/>	Document No	<input type="text" value="JOB000155"/>
Customer Reference	<input type="text" value="234253"/>	Due Date	<input type="text" value="2017-06-04"/>	Process Date	<input type="text" value="Pending"/>		

Product Type	Product	Description	Qty	Incl Price	VAT Type	Disc %	Discount	Excl Price	VAT	Total
Hardware	3.5 GHz Installation...	3.5 GHz Installation	1	3,999.00	Stan...	0.00	R 0.00	R 3,507.89	R 491.11	R 3,999.00

+ Add Another Line

Categories

Invoice Message

Total Discount

Total Exclusive

Total VAT

Total

Close
Update

Click on the **update** button to save the draft invoice. The invoice screen will close and the lead will move to Invoicing – Active.

7.2. Invoicing - Active:

7.2.1. Updating the job card:

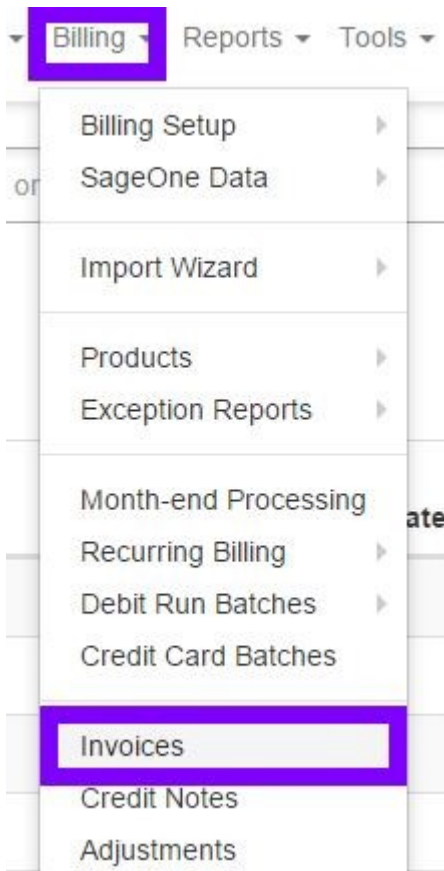
After the customer’s invoice has been generated, the lead will move to **invoicing - active**. This is to ensure that all needed information has been added. If there is still any

information relating to the job that needs to be added to the job card, the job card can still be **updated**. If no additional information needs to be added, push the invoice to sage one to send it to the customer.

	Date	Status	Job Card ID	Job Card Number	Type	Contact Name	Contact Mobile	Date	All Day	Address	Sales Agent	
Leads	2017-05-30 13.29.03	Invoice Generated <small>a day ago</small>	3	JOB000003	Installation	Jacqueline du Plessis	0799999999	30 May 2017 : 08:00 - 09:00	0	105 Helderberg College Road Die Wingerd Cape Town 7130 South Africa	Jennifer du Plessis	
Surveys	2017-05-30 13.29.12	Invoice Generated <small>a day ago</small>	5	JOB000005	Installation	Jennifer Test	0123456789	30 May 2017 : 08:00 - 09:00	0	105 Helderberg College Road Die Wingerd Cape Town 7130 South Africa	Jennifer du Plessis	
Quotes	2017-05-30 13.29.34	Invoice Generated <small>a day ago</small>	7	JOB000007	Installation	testtest	0722966502	30 May 2017 : 08:00 - 09:00	0	105 Helderberg College Road Die Wingerd Cape Town 7130 South Africa	Jennifer du Plessis	
Customers	2017-05-30 13.29.40	Invoice Generated <small>a day ago</small>	6	JOB000006	Installation	Julia Kotze	0799999999	30 May 2017 : 08:00 - 09:00	0	48 Caledon Street Lionvitham Cape Town 7130 South Africa	Jennifer du Plessis	
Job Cards	Showing 1 to 4 of 4 entries											
Invoicing												
New												
Active												

7.3. Sending the invoice to the customer:

To send the invoice to the customer, you first need to generate the sage one invoice. To do this, go to the **"Billing"** tab and then click on the **"Invoices"** option.



On this screen, you can see a list of all documents that need to be pushed through to Sage One. Type the name of the customer to whom you want to send the invoice to in the “**search**” box. If you need to update the invoice, click on the blue button (left of the green section). If the invoice is ready to be sent to the customer, click on the **orange** button in the **green** section to generate the sage.

Customer	Reference	Document Date	Due Date	Document No	Pay Method	Paid	Document Amount
State of Florida	JOB000008	2017-05-31	2017-06-05	INV0000007	EFT	Unpaid	
State of Florida	JOB000006	2017-05-30	2017-06-04	JOB000006	EFT		
State of Florida	JOB000007	2017-05-30	2017-06-04	JOB000007	EFT		
State of Florida	JOB000005	2017-05-30	2017-06-04	JOB000005	EFT		
State of Florida	JOB000003	2017-05-30	2017-06-04	JOB000003	EFT		

After clicking on the “**Generate Sage One Invoice**” button, a pop-up screen will appear. Click on the “**Generate**” button to send the invoice to the customer. The invoice will now automatically be sent to the customer.

Generate SageOne Invoice
✕

Are you sure you want to generate a SageOne invoice?

Generate

5.3.1. If you receive an error when generating the invoice.

If a pop-up notification appears giving you an error message after you have click on the generate button, please consult with your financial manager.

(Please check under SageOne syncing for errors.)

Error generating invoice



An error has occurred. Unable to generate a SageOne invoice
Please check the invoice details and try again.

Customer is Required.

OK

7.4. What happens after the invoice has been sent to the customer?

After the invoice has been generated, the lead will be closed and moved to invoicing completed.