

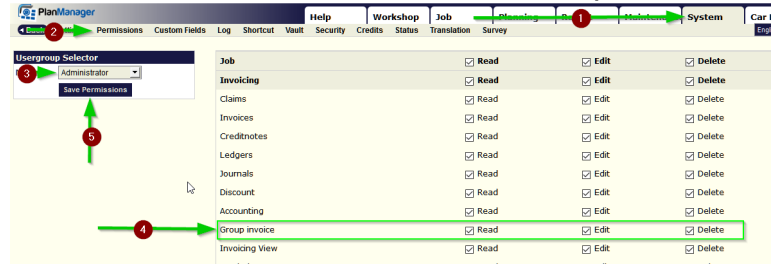
Group multiple jobs into 1 invoice.

Introduction

The group invoicing allows you to group multiple jobs into a single invoice. This is useful if you have customers who repair several cars per month, but want one invoice.

Activate

The menu group invoice ④ is not enabled by default. You will need to activate this for your users. Go to System ① - Permissions ②, and make sure that Group invoice



④ is checked in the section Invoicing.

How to make a grouped invoice?

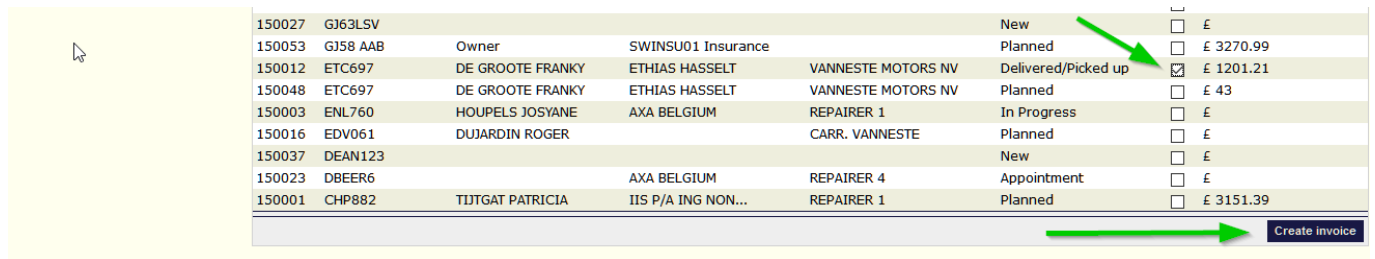
Go to the Invoicing menu - Grouped invoice, here you will see an overview of all your jobs to be invoiced. On the left you can use the filter to display selected jobs.

PlanManager							
Help Workshop Job Planning Report Maintenance System Car Fleet Invoicing							
Back Invoices Claims Creditnotes Ledgers Journals Discount Accounting Group invoice Reminders Standard Comments English (United Kingdom)							
59 items							
Job	Registration	Owner	Insurer	Repairer	Status	Invoice estimation	
150013	XAC783	SABBE DORINNE		CARR. VANNESTE	In Progress	<input checked="" type="checkbox"/>	£ 838.41
150017	VIN011	DESIRE STADSBADER	IIS P/A ING NON...	CARR. VANNESTE	Planned	<input type="checkbox"/>	£
150033	TESTER12				Merged	<input type="checkbox"/>	£
150035	TESTER12				New	<input type="checkbox"/>	£
150034	TEST 3		AXA BELGIUM		In Progress	<input type="checkbox"/>	£ 215
150036	TEST 2	test			In Progress	<input type="checkbox"/>	£ 342.5
150044	TEST 2	test			New	<input type="checkbox"/>	£
150032	TEST 1				In Progress	<input type="checkbox"/>	£
150038	SP14SKD	DE MEESTER NICO			Merged	<input type="checkbox"/>	£
150040	SP14SKD	DE MEESTER NICO			Delivered/Picked up	<input type="checkbox"/>	£
150029	RCC285	WOUTERS LEEN	DVV VERZ & LES ...	CARR. VANNESTE	Delivered/Picked up	<input checked="" type="checkbox"/>	£ 2977.82
150046	QW23WEE	DIRECTLEASE NV			In Progress	<input type="checkbox"/>	£
150058	MGC1234			REPAIRER 4	New	<input type="checkbox"/>	£
150039	KLO6XDB	Smith	AXA BELGIUM	CARR. VANNESTE	In Progress	<input checked="" type="checkbox"/>	£ 1095
150007	KJK004	MAEBE HARRY	DVV VERZ & LES ...	CARR. VANNESTE	Planned	<input type="checkbox"/>	£
150028	KJK004	MAEBE HARRY	DVV VERZ & LES ...	CARR. VANNESTE	Appointment	<input type="checkbox"/>	£
-2015	INTERNAL	INSYPRO		REPAIRER 4	In Progress	<input type="checkbox"/>	£
150014	HIQ359	HUSSAIN MUNAWAR		CARR. VANNESTE	New	<input type="checkbox"/>	£
150025	HG16ZVX	DESIRE STADSBADER			Planned	<input type="checkbox"/>	£
150041	GV15FGX	Mike Fuller			Planned	<input type="checkbox"/>	£
150055	GV072WT			REPAIRER 4	New	<input type="checkbox"/>	£
150027	GJ63LSV				New	<input type="checkbox"/>	£
150053	GJ58 AAB	Owner	SWINSU01 Insurance		Planned	<input type="checkbox"/>	£ 3270.99

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Make sure that any file you wish to invoice is filled in.

Select the files you want to group on one invoice. Then click the Create invoice button.



150027	GJ63LSV				New	<input type="checkbox"/>	£
150053	GJ58 AAB	Owner	SWINSU01 Insurance		Planned	<input type="checkbox"/>	£ 3270.99
150012	ETC697	DE GROOTE FRANKY	ETHIAS HASSELT	VANNESTE MOTORS NV	Delivered/Picked up	<input checked="" type="checkbox"/>	£ 1201.21
150048	ETC697	DE GROOTE FRANKY	ETHIAS HASSELT	VANNESTE MOTORS NV	Planned	<input type="checkbox"/>	£ 43
150003	ENL760	HOUELS JOSYANE	AXA BELGIUM	REPAIRER 1	In Progress	<input type="checkbox"/>	£
150016	EDV061	DUJARDIN ROGER		CARR. VANNESTE	Planned	<input type="checkbox"/>	£
150037	DEAN123				New	<input type="checkbox"/>	£
150023	DBEER6		AXA BELGIUM	REPAIRER 4	Appointment	<input type="checkbox"/>	£
150001	CHP882	TIJTGAT PATRICIA	IIS P/A ING NON...	REPAIRER 1	Planned	<input type="checkbox"/>	£ 3151.39

Create invoice

An invoice will be created in which the selected jobs are combined. You can customize this invoice even further but keep in mind that if you change lines, these changes will not affect the calculated margin.

PlanManager will clear the batch invoicing, creating a single invoice file for each job. The contribution report and the financial calculations therefore will always be calculated on the internal invoices and not on the grouped invoice.

When you are sure the data on the invoice is correct, click the Assign Document No. button. You can print the invoice thereafter.

You can print the grouped invoice in detail, but in most cases you will need a new PDF layout to deliver a well-grouped invoice to your customer.

This new invoice layout can be custom made and can be requested at support@insypro.com.

Unikátní ID: #2099

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Aktualizováno: 2019-10-08 11:39