Miscellaneous Invoices

The DTS is a dump truck billing machine. The main data entry screens account for billing and paying at the same time. Occasionally, you may need to create invoices where payment to drivers or outside haulers is not going to be entered. The Miscellaneous Invoices screen quickly invoices for items such as dump or bridge fees and even material sales or resale.
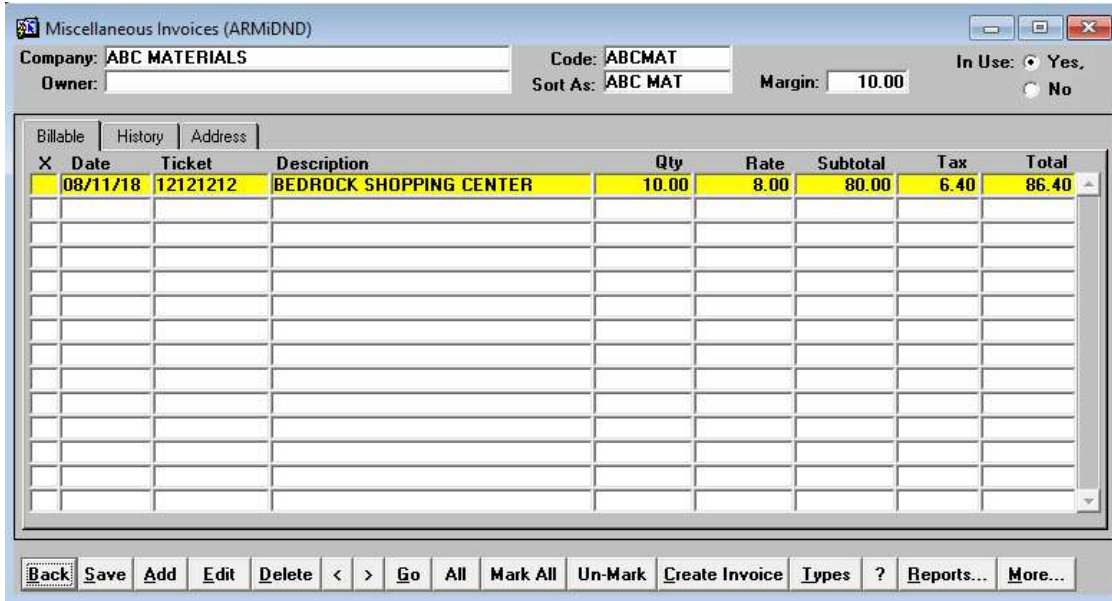

Figure 1 Miscellaneous Invoice Main Screen

When the screen is entered a pick list of customers appears. Select the customer to invoice. The screen appears as show in Figure 1. The top part of the screen shows the name and owner information. Note that the *Margin* field can automatically mark up the sales price of material. The *Billable* tab shows items that have been entered but have not yet been invoiced. The *History* tab is where the invoiced items are kept. The *Address* tab allows changing the customer's address and displays the phone numbers.

The add and edit screen appears as shown in Figure 2. The fields with red labeling contain pick lists. These pick lists automatically pop up if the field is blank. Double click in the field to cause the list to appear.
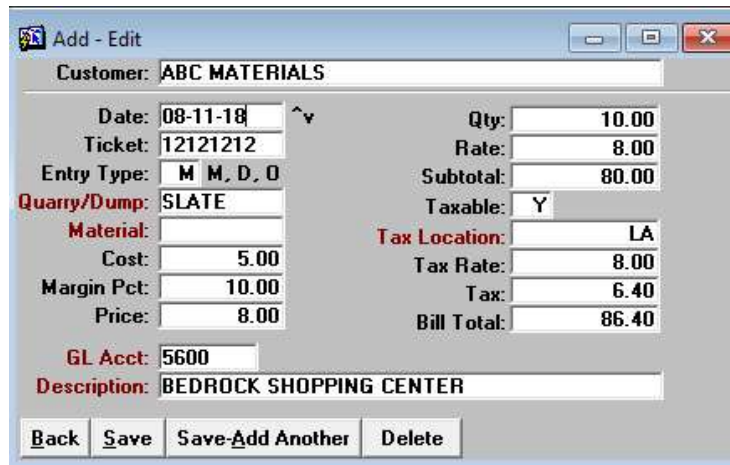

Figure 2 Add-Edit Screen

Figure 3   Miscellaneous Invoice Buttons

The **[Back]** button exits the screen. Use **[Save]** to commit any changes. **[Add]** and **[Edit]** cause the detail screen to appear. Items not already invoiced can be deleted by clicking on the **[Delete]** button.

The **[<]** and **[>]** buttons scroll the customers backward and forward. Click the **[Go]** button to go directly to a customer. Once a single customer is selected you will not be able to scroll. Click on the [All] button to resume the ability to scroll through the customers.

To create an invoice, enter the detail lines. Check mark the box to the left of the items to invoice. If there are several items, use the **[Mark All]** button. To remove all the marks you may also click on **[Un-Mark]** button. When ready, click on **[Create Invoice]**.

The **[Types]** button allows for the entry of commonly used descriptions. For example, "Dump Fee", "Bridge Toll", "Flag Man" et cetera. The **[?]** button displays this user guide.

[Reports…] and **[More…]** contain additional options.

To finalize the invoice, click on the [Create Invoice] button. A small screen appears as shown in Figure 4. Tab through the fields to have the next sequence number generated, select the copies and enter the *Customer Job* and *Purchase Order*.

Figure 4   Finalizing the Invoice

A sample invoice appears as shown in Figure 5. The invoices are customizable. For example, the quarry or dump can be listed. Your logo can appear on the invoice.

FRED FLINTSTONE TRUCKING
PO BOX 1
BEDROCK CA 90000
Office: 800 555-1212   Fax: 800 555-5555
LIC#: 123456

INVOICE: 2016
Date: 08/11/18

ABC MATERIALS
100 MAIN STREET
BEDROCK CA 900000

Customer Job: ABC JOB 123
Purchase Order: PO 123456789

Date	Ticket	Description	Material	Quantity	Rate	Tax	Subtotal
08/11	12121212	BEDROCK SHOPPING CENTER	3/4" CRUSHED ROCK	10.00	8.00	6.40	80.00

Subtotal:	80.00
Tax:	6.40
Total:	86.40
Amount:	86.40

Figure 5   Invoice Format