Invoicing By Customer Job

This screen is used to invoice customers by their individual jobs. When the screen is entered, the current month Begin and End date are supplied. The DTS will also query the customers that need invoiced and show how many invoices for each customer need to be produced. For Example, Barney Rubble has three distinct jobs that need billed. The top right corner shows the earliest date for freight bills that have not been invoiced.

If you are in this screen at the beginning of a month, the dates still default to the current month. To quickly set the dates to the prior month if you are still working on closing out, click on the **[LM]** button to quickly change the dates to the prior month and show the customers remaining to be invoiced.

Click on the **[Back]** button to exit this screen. The **[?]** button displays this guide. [Refresh] is used after the dates are changed. The DTS will query the system to see what customers need invoiced. There are two ways to go to the next step and actually create the invoices. Either double-click on a customer, or single click and then choose the **[Expand]** button.

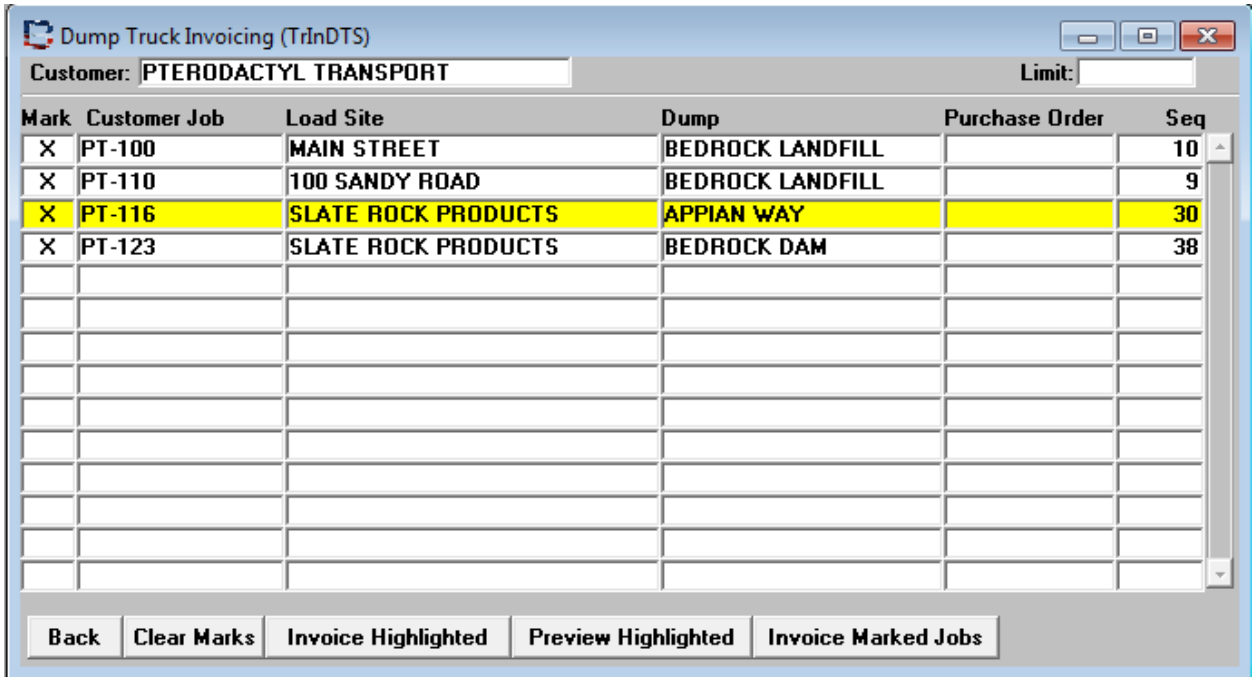| Regular Invoicing (TrInDTS)			
Customer	**Co Code**	**Invoices**	
ABC CAVE CARVERS	2	2	Earliest Date: 01/02/13
BARNEY RUBBLE	150	3	Invoice Style: TRINDTS
BEDROCK LANDSCAPE	152	1	
FLINTSTONE TRUCKING	154	3	Begin: 02/01/13 LM
PTERODACTYL TRANSPORT	3	5	End: 02/28/13
SCREE ROCK DELIVERY	100	2	
SLATE ROCK PRODUCTS	254	1	

Back | ? | Refresh | Expand

First Time Users.
The Dump Truck System provides two different invoice formats.

a) The invoice numbers are sequential. If you are starting the DTS new, be sure to override the number 1 with what the numbering sequence you want the DTS to start incrementing.
b) The second style of invoice numbers consists of a Year and Month combination and the sequence numbers increment within the Year and Month. For example, 201301-1 is the first invoice in January of 2013. The next invoice would be 201301-2. The first invoice in February would be 201302-1. This method provides a quick way to gauge how many invoices have been created in the month. It also gives you a quick reference to the time period the invoice covers.

The next screen depicts that Pterodactyl Transport was selected to create invoices. The jobs can be placed on separate invoices by clicking once to highlight the job and then click on the **[Invoice Highlighted]** button. Sometimes a customer may desire an invoice that includes more than one job number, or wants all jobs to be on a single invoice. Be sure the left column is X'ed and then click on **[Invoice Marked Jobs]**.

Mark	Customer Job	Load Site	Dump	Purchase Order	Seq
X	PT-100	MAIN STREET	BEDROCK LANDFILL		10
X	PT-110	100 SANDY ROAD	BEDROCK LANDFILL		9
X	PT-116	SLATE ROCK PRODUCTS	APPIAN WAY		30
X	PT-123	SLATE ROCK PRODUCTS	BEDROCK DAM		38

Dump Truck Invoicing (TrInDTS)

Customer: PTERODACTYL TRANSPORT   Limit:

Back   Clear Marks   Invoice Highlighted   Preview Highlighted   Invoice Marked Jobs

The **[Preview Highlighted]** button will display what the invoice will look like when it is invoiced. Sometimes a quick peek will catch an issue and can be corrected before the invoice is created.

When the **[Invoice Marked Jobs]** or the **[Invoice Highlighted]** is selected the small window appears as shown below. Enter the date on the invoice and **then press [Enter] through the fields** so that the next Sequence can be selected for you.

Finalize This Invoice   B

Date on Invoice: 03/13/13
Invoice YearMo: 201303
Sequence: 4
Copies: 3
Invoice Reference:
Purchase Order:

Back   Accept