

Job Completion and Invoicing

The typical configuration to complete a job is to set the job status to "Job Completed" when a worksheets are either Completed or Completed with Issues".

In the example below the Job will be set to Completed once Zach has completed both worksheets.

DEMO QUOTE JOB

TIP: There are instances where a job may have hundreds of worksheets. The Job status will update to "Job In-Progress" as soon as any Worksheet is started or completed. The status of "Job In-Progress" will remain until all Worksheets are Completed. This status could remain for weeks or even months depending on the length of the job.

If for any reason a Worksheet is never completed and never will be completed then either those worksheets must be deleted or the administrator will need to override the Job status and set the job status as "Completed" or other appropriate status.

Invoicing the Job

Once the job is complete and you are ready to invoice for the job there are two options.

- Convert an existing quote to an Invoice
- Create an invoice directly

Convert and existing quote to an Invoice

If the job was based on an accepted quote, from the Financials tab click on the Convert to Invoice link. This will convert the quote to an invoice with the same values which you can then send to the customer.

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?

Adam

Create Jobs

View Jobs

Import

Job Report (BIW)

Timeline Diary

Grid Diary

Export Payroll Data

Vehicle Tracker

Export P&L Report

Job Meeting & Invoice report

DEMO QUOTE JOB

BASIC

Location/Timing

Worksheets

Attachments

Appointments

Financials

POs

P & L

T/S

Expenses

ACTIONS

Create Quote

#	Num	Title	Account	Status	Subtotal	Grand Total	Valid Until	User	Action
Quotes	22559	Quote-Demo quote job-14042024	Rakata Technology	Confirmed	100.00	120.00		Adam	Convert to Invoice

Create Invoice

#	Num	Title	Account	Status	Subtotal	Grand Total	Disburse	User
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ACTIVITIES

HISTORY

From within the invoice record this can then be downloaded as a PDF or sent to the customer directly from the CRM.

Revision #2
Created 14 April 2024 06:38:28 by RakataTech
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