

Invoices and Credits Overview

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There are three types of invoices a user can create: recurring invoices; work order invoices; and manual invoices. Manual invoices and Recurring invoices are covered within the Accounts Receivable chapter. Work Order invoices are covered under the Work Order category.

- Recurring Invoices are typically created in bulk once a month. This operation is performed from Accounts Receivable > Invoices> Recurring Invoices.
- Work Order Invoices may be created from an individual work order or by invoicing from the Ready To Bill queue (Accounts Receivable > Work Orders > Ready to Bill Work Orders).
- Manual Invoices are created for products and services not linked to RMR or a Work Order.

Credits may only be created on a manual basis.

When would a Manual Invoice or Credit be used?

Manual invoices/Credits may be created for several different situations including:

- Over the counter part sales
- Pro-rated recurring services
- Permits & Fees
- Invoicing a customer for NSF charges
- Should have invoiced for charges on a Work Order, but the work order was closed without invoicing the customer.
- Parts used on a Work Order were not invoiced on the work order invoice, and you need to invoice the customer and relieve inventory.