

Invoicing from the Ready to Bill List

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When the work has been completed on a work order; it has been reviewed for accuracy; and the status set to Ready To Bill, it can be invoiced from the Ready To Bill Work Orders List.

Navigate to Accounts Receivable > Work Orders > Ready To Bill Work Orders (tab).

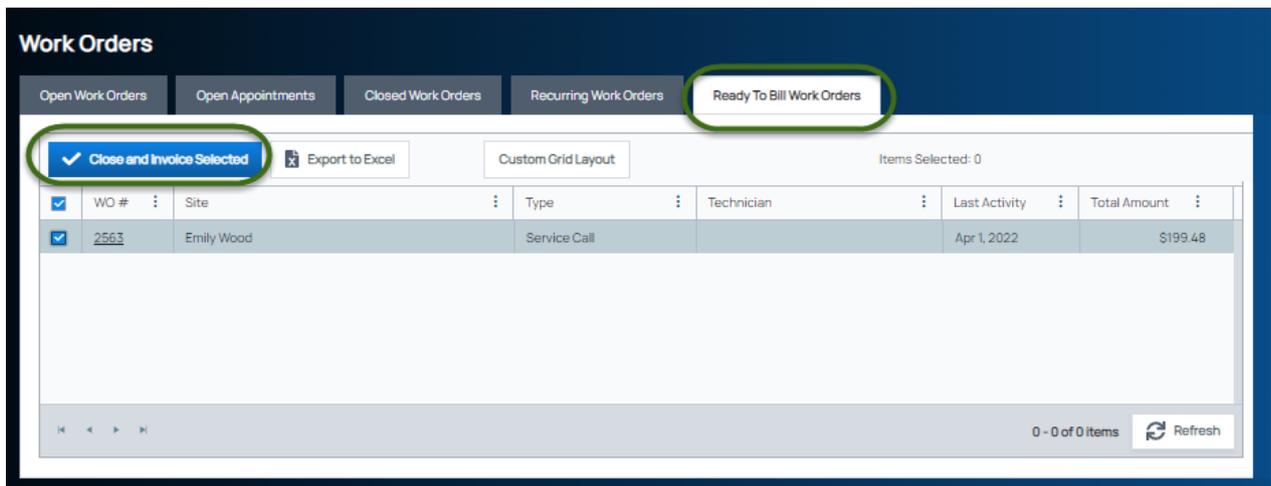
All Work Orders ready to be invoiced are listed in the grid area.

Invoice All

If you want to invoice and close all work orders in the list, select the checkbox to the left of the header column labeled WO#. A checkbox appears to the left of all work orders in the grid area.

Invoice Selected

If you want to invoice and close certain work orders in the list, select the checkbox to the left of each work order to be included in the invoicing.

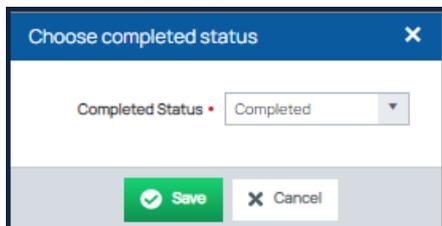


The screenshot shows the 'Work Orders' interface with the 'Ready To Bill Work Orders' tab selected. The 'Close and Invoice Selected' button is highlighted with a green circle. The grid below shows one work order selected, with a checkbox in the 'WO #' column. The work order details are:

WO #	Site	Type	Technician	Last Activity	Total Amount
2563	Emily Wood	Service Call		Apr 1, 2022	\$199.48

When finished selecting the work orders to invoice, click the **Close and Invoice Selected** button.

After clicking the **Close and Invoice Selected** button, a dialog box is displayed, prompting you to select a status to assign to all the work orders invoiced. Select **Completed** from the drop-down list, and then click the **Save** button.



The dialog box titled 'Choose completed status' has a close button (X) in the top right corner. It contains a label 'Completed Status' followed by a dropdown menu showing 'Completed'. At the bottom, there are two buttons: 'Save' (with a green checkmark icon) and 'Cancel' (with a grey X icon).

A banner message is displayed as shown below. If the software encounters problems invoicing any of the work orders, they will remain in the Ready To Bill Work Orders grid for further investigation.

