

Service Invoicing

To have a successful service business you need a billing system that gets invoices to your customers promptly and with the right information. Ideally you could also save time by having your service order and contract information flow automatically into your invoices. For these results and more you should be using SouthWare's Service Invoicing.

S O U T H W A R E E X C E L L E N C E S E R I E S >

BENEFITS

SERVICE MANAGEMENT

The screenshot displays the 'Enter/Edit Billing Information' window in the SouthWare Excellence Series software. The window title is 'SV 02.02 SouthWare Excellence Series (DMJ) Demo Company rev11'. The interface includes a menu bar (File, Edit, Approx, Search, Next, Previous, Enter, Options, Breakout, Link, Help) and a toolbar. The main area is divided into several sections:

- Header:** Order# 153, Montred Morris, Type Regular.
- Table:** A table with columns: Line #, Type, Item ID, Description, Loc, U/M, H/C, Quantity, Qty B/O, Unit Price, Extended Price. Row 1: S 10, S, LBR/MISC, Labor charges, Hrs, 1.000, .000, 0.000, .00.
- Payments:** 34 Drawer, 35 +Cash, 36 +Check, 37 +CCard/Oth.
- Summary:** Subtotal, Discount, 31 +Misc Charges, 32 Tax (Alabama/Auburn/Lee, 7.5000%), Invoice Total, Payment Total, 38 Terms (2, 2/10 Net 30).
- Footer:** # to change, OK, Finish, DEMO, 10/24/05, 8781.

Services Invoices

- Enter a service invoice quickly
- Instantly bill a completed service order from Service Orders
- Produce invoices from contracts in Contract Management
- Streamline the handling of complex sales situations
- Put as much detail on an invoice as you need
- Ensure that standard pricing is used on your invoices
- Get your invoices recorded in A/R almost instantly
- Know the details of past invoices
- Standardize your miscellaneous add-on charges
- Keep your A/R system updated with sales taxes, commissions, and other information from the latest invoices

Service Invoicing provides the billing system for SouthWare's Service Management Series, a complete system for service businesses. With Service Invoicing you'll be confident that you're getting your service invoices processed efficiently and accurately.



Features & Functionality

Invoice Entry Features

- Streamlined entry and printing of an invoice
- Standard service codes for default descriptions, pricing, and other info
- Handle credits, special orders, pricing adjustments, and payments on account
- Option to change billing or shipping info
- Commission and sales tax info on parts and service are automatically calculated
- Option to add a customer on an invoice
- Credit limit checking
- Option to look up past invoice pricing
- Unlimited text lines on an invoice
- Any combination of cash, check, credit card, or on account payment
- Up to 4 miscellaneous charges per invoice
- Notes and optional Extended Data

Integration with A/R Features

- Invoices update A/R open items, sales tax, commissions, G/L, customer info
- A/R inquiry option to zoom on invoices
- Statement option to print invoice detail

Generating Invoice Features

- Generate from contracts
- Generate from service orders
- Generate from equipment service pricing

Management and Reporting Features

- Sales analysis reports
- End of day sales register
- Billing history report for invoice detail

Flexible Service Codes

Service Invoicing can help you answer such questions as:

- How can we get our invoices sent out the same day that we're ready to bill?
- How can we make sure our customers know the details of the services and parts that we're billing?
- How can we eliminate the lost time spent trying to explain to a customer the details of each invoice on their statement?
- How do I quickly print an invoice for the service order when a customer picks up his repaired equipment?
- How can we make sure we're charging the right sales tax on our parts and services?
- How can we reduce the amount of time we spend generating invoices for contract renewals?
- How can we easily create an invoice for the miscellaneous services not related to a service order?
- What was the customer PO number on this invoice?
- How did the customer pay for this invoice?
- Should we have paid commission on this invoice?



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