

Billing with JOBZ!

When sales reps use JOBZ! for order entry, they print (or email+PDF) a document from the database called the Sales Order to Production, or SOP. This is built from the same sales-entered data that produced the original Request For Estimate (RFE) and the Proposal signed by the customer. It contains all of the information the production department needs from sales to manufacture a job, including mailing specifications, delivery instructions and sample destinations.

The ORDER input screen builds on the data already entered on the QUOTE screen, which builds on the information originally entered on the SPEX screens. Along the way, documents are produced which present this incrementally entered information in ways appropriate for the intended recipient- the estimator, the customer, the production planner, shipping etc., in turn.

As the final step in the JOBZ! workflow, a job should be changed to the status Billed, and the final shipping quantity should be entered on the INVOICE input screen. (This quantity is set at Order Entry to be the customer's order quantity, so this step is optional, but in those cases where you are charging for overs or crediting for unders, a billing calculation will be performed.) Once the job has been set to Billed status, it fuels a great number of reporting capabilities including YTD Sales vs. Budget, current month sales, The Pipeline, and a number of Billed sales reports that summarize by sales rep, customer, product type and so on.

A Billed job is also available for cloning in case a job with similar specifications needs to be quoted, or a re-run is ordered. A sales rep can quickly refer to any of his or her past jobs to determine how it was priced, so that consistency is maintained.

An optional workflow document can be produced at the end of a job which summarizes all of the information needed to prepare an invoice, or to compare with an invoice generated by another system.

This document can be titled Invoice Draft, which is the default, or whatever is appropriate (Pro-Forma Invoice, Sales Draft, Billing Instructions, etc.)

There are actually about a dozen variations on this document, offering such choices as billing by price per thousand, or by a unit price, or per thousand square inches (MSI), or displaying mailing and distribution charges. If any Author's Changes have been entered in the course of a job, these will be displayed as well. There are also 5 fields for miscellaneous charges, and a line that describes the agreed-upon terms of sale.

Also available, for those with Management access, is a place to enter up to three progress payments, and the final amount due is calculated accordingly.

The information displayed on this document is the information already entered in earlier stages of the job, so it can be produced by simply selecting the appropriate format. Another option at this point is to enter the sales rep's commission rate(s) and produce a combined worksheet of billing and commission calculations.

If desired, a manager or other sales support JOBZ! user can enter the shipping quantity and print the draft for the sales rep to review. This can be an easy way to accelerate your billing turnaround.

Following are some example documents produced from the Invoices menu, all from the same job, by selecting different output options and changing the document title.

Accounts Payable
 11 by Seventeen
 2538 22nd Street Suite A4
 Opa City WI 54956

Date: July 13, 2009
 Invoice #
 Purchase Order # 558796
 Our Job # 826-4452
 Sales # 826
 Customer # 12951111

INVOICE DRAFT



42,000 Buckets Of Rain	2009348	
4 pages + cover		
40,000 Copies as quoted @		\$10,500.00
2,000 Additional/less copies @ \$262.50 /M		\$525.00
Author's Changes per memo 7/1/09 to Paige Turner		\$300.00
Extra amount		\$500.00
Last minute addition		\$1,200.00
One more item- five lines available		\$210.00
	+ Mailing	\$4,760.00
	Subtotal	\$17,995.00
	Invoice Total	\$17,995.00

Payments received against this order \$6,173.00
Due \$11,822.00

Terms of sale: 50% with order, balance upon delivery.

Notes to the billing department, or explanation of tax calculations etc.

Accounts Payable
 11 by Seventeen
 2538 22nd Street Suite A4
 Opa City WI 54956

Date: July 13, 2009
 Invoice #
 Purchase Order # 558796
 Our Job # 826-4452
 Sales # 826
 Customer # 12951111

BILLING INSTRUCTIONS

42,000 Buckets Of Rain	2009348	
4 pages + cover		
40,000 Copies as quoted @		\$10,500.00
2,000 Additional/less copies @ \$262.50 /M		\$525.00
Author's Changes		\$300.00
Extra amount		\$500.00
Last minute addition		\$1,200.00
One more item- five lines available		\$210.00
+ Mailing		
Handling		\$1,500.00
Data Services		\$785.00
Addressing		\$2,225.00
Inserting		\$250.00
	+ Mailing	\$4,760.00
	Invoice Subtotal	\$17,995.00
	Invoice Total	\$17,995.00
	Payments received against this order	\$6,173.00
	Due	\$11,822.00



Terms of sale: 50% with order, balance upon delivery.

Notes to the billing department, or explanation of tax calculations etc.

Tuesday, July 14, 2009 3:12:51 PM

Accounts Payable
 11 by Seventeen
 2538 22nd Street Suite A4
 Opa City WI 54956

Date: July 13, 2009
 Invoice #
 Purchase Order # 558796
 Our Job # 826-4452
 Sales # 826
 Customer # 12951111

PRO-FORMA INVOICE

Buckets Of Rain 2009348
 4 pages + cover

42,000 copies as quoted @ \$0.262500 per piece	\$11,025.00
Author's Changes per memo 7/1/09 to Paige Turner	\$300.00
Extra amount	\$500.00
Last minute addition	\$1,200.00
One more item- five lines available	\$210.00
	+ Mailing \$4,760.00
	Subtotal <u>\$17,995.00</u>
	Invoice Total \$17,995.00



Payments received against this order \$6,173.00
Due \$11,822.00

Terms of sale: 50% with order, balance upon delivery.

Notes to the billing department, or explanation of tax calculations etc.

Accounts Payable
 11 by Seventeen
 2538 22nd Street Suite A4
 Opa City WI 54956

Date: July 13, 2009
 Invoice #
 Purchase Order # 558796
 Our Job # 826-4452
 Sales # 826
 Customer # 12951111

INVOICE DRAFT: Sales Signoff Required within 24 hours

42,000 Buckets Of Rain 2009348
 4 pages + cover

As quoted @ \$262.50 per 1,000 \$11,025.00



Extra amount \$500.00
 Last minute addition \$1,200.00
 One more item- five lines available \$210.00

Author's Changes \$300.00
 + Mailing \$4,760.00

Subtotal \$17,995.00

Invoice Total \$17,995.00

Payments received against this order \$6,173.00

Due **\$11,822.00**

Terms of sale: 50% with order, balance upon delivery.

Notes to the billing department, or explanation of tax calculations etc.

Billing Instructions, Job # 826-4452**Jim Taylor
JOBZ! For Printing Sales****Invoice To**Accounts Payable
11 by Seventeen
2538 22nd Street Suite A4
Opa City WI 54956Date: 7/13/2009
PO # 558796
Job # 826-4452 826
Estimate # 826-4452**Invoice Content**

42,000 Buckets Of Rain	2009348		
40,000 Copies as quoted			\$10,500.00
2,000 2000 Additional Copies	\$262.50 /M		\$525.00
Author's Changes per memo	7/1/2009 to Paige Turner		\$300.00 10.0%
Extra amount			\$500.00 20.0%
Last minute addition			\$1,200.00 20.0%
One more item- five lines available			\$210.00 20.0%
		+ Mailing	\$4,760.00
			\$17,995.00
		Invoice Total	\$17,995.00

Bill Freight? Freight Additional

Taxable? No

Commission Calculations

Estimate	10,500		
Base Sell	10,500	100.0%	
Markup	0	27.0%	
+ Add-On			
= Net Quote	10,500		
+ ACs Charged	300	10.0%	
+ Mailing & Dist.	4,760	10.0%	
+ Overs	525		
= Invoice Subtotal without Tax and Freight	17,995		
Non-Commissionable Amount			
Total Actual Cost	15,250		Cost
Actual Materials and Outside Purchases	6,200		VA
= Value Added	11,795		In 100.00% 45.71%
Commission Basis Quote			Out 118.00% 65.55%
Commission Rate	5.00%		
= Commission Base Amount	\$1,439.25		
+ Bonus	500.00		Target Account Bonus
+ Other Commission Amount			
= Total Commission	\$1,939.25		
= Percent Of Gross	10.8%		

JOBZ!