General Invoice Sales Tracker

"RE-BILL"

This feature of GIST is intended for firms who send the majority of their invoices to the same list of customers, at the same addresses, with the same charges, for the same services, month after month.

Businesses such as Lawn Maintenance,   Landscapers, Pool Service, Rentals, Cleaning Services, Security Services, Snow Plowing, Street Sweeping, Cable TV, and so on. It is most often used for "Services Rendered", and not for "Items Sold".

The purpose of this feature is to eliminate the task of having to manually re-type all of those invoices by hand, each and every billing period.

The REBILL feature lets the user select a list of "older" invoices from any range of dates (like "last month" for example). It will then display each of those invoices from that time period on the screen (one at a time).

If you are in the habit of creating all of your routine monthly or weekly invoices on a particular date in each billing period (such as on the 1st or 15th), then enter that date as the beginning AND ending date, and only the invoice records created on that day will be selected for your review and possible re-billing (but don't forget to review the invoices for the entire previous billing period too, to find any "new customer" invoices).

On the right side of the REBILL Window is a smaller box with the label "Create A New Invoice For This Older Record". Inside of that same box are also two buttons which you can click on with your mouse. One is labeled "YES" and the other "NO".

If you click on the "YES" button, a brand new invoice is created in your invoice file. It is an exact copy of the displayed invoice, but with "Today's Date" as the invoice date, and marked as "UnPaid" (with no date in the "Invoice Paid" field).

After you click on either the "YES" or "NO" buttons, the routine automatically moves to the next record until the last selected record is reached.

If you create an invoice by mistake, just make a note of who it was for. When finished with the REBILL routine, then go into the INVOICE form and select "Datasheet View".

Then sort the displayed data by highlighting the "Invoice Date" column, and then click on the "Desending Sort Button" in the top tool bar. All of your newest invoices will then appear at the very top of the list of records. It is then an easy matter to find and delete any invoices created by mistake.

Another method to delete invoices "REBILLED" by mistake is to go to the INVOICE form, and then click on the "Invoices By Date" command button, and then enter a "T" for "Today". Again, it will be an easy task to find the invoice records you need to delete, as only those invoices created "TODAY" will appear on the screen.

If you need to manually adjust values or add some inventory transactions to any of the new invoices, using the "Today's Invoices" routine in the INVOICE form is the best way to do that job too.

When finished, you can either print each invoice for mailing to your customers, or you can have GIST print up your monthly "Customer Statements" for mailing to your customers. With a little careful folding (so that the customer's name and address appears in the envelope's "window"), either of those forms can be inserted into "Window Envelopes" for easy mail preparation (no mailing labels needed).

We recommend that you use the "Customer Statements" for this, as they will also show any previous, unpaid balances too.

IMPORTANT: No previous Invoice "Transaction Records" are duplicated in the ReBilling Routine. Only the data displayed on the invoice screen *without* opening the "Transaction" or "Payments" windows will be copied to the new invoice. As a result, when you originally create any new invoices which will need to be copied in each billing period, try to avoid using any "Transaction Records". Instead, enter a typed list of what routine charges the invoice covers in the "Misc. Fees And Comments" field, and place the total amount for those charges into the "Misc. Charges" field. Don't forget to "Check" or "UnCheck" the check box labeled "Taxable" next to the "Misc. Charges" field.

If your new invoices absolutely need to have one or more transactions because of inventory item tracking, it's okay. You can add those transactions manually during the next step. It just involves one more step in the ReBill process.

After you have created all of your new "ReBill" invoices, exit from the "REBILL" window and go to the INVOICE Window. Then click on the button named "INVOICES By DATE", and enter a "T" for "TODAY". Only the invoices with today's date will be selected for viewing, editing, deletion, and printing. Remember, EVERY INVOICE created "today" will be in that selection, not just those you created in the ReBill routine. So to save time and confusion, it's a good idea to run your ReBill routine early in the day, before any other invoices for that day have been entered.

As you browse through each new invoice in the "INVOICES By DATE" selection, check them over for accuracy. You may edit any of them, adding or deleting special charges for extra items, or adding any "Inventory Transactions" as needed. When you are sure each new invoice is correct, then print it for mailing to the customer, and/or for filing in your hard copy file.

When finished printing all of your new invoices, you can go back to selecting "ALL" the invoices in the entire file by clicking on the button named "ALL INVOICES", or by exiting from the invoice window and then returning to it again.