3- Edit



The complete list of invoiced items (and checklist items) can be found in the ALL Items tab for review. Can review the Qty Ret, Qty Del (Qty), Price, Line Item Notes

NOTE: Things can be added or edited in their individual tabs

Rentals

Products

Labor

Checklist

4- Rentals



In the rentals Tab, Double Click to open an existing or click ADD NEW to add an item



Select the product from the drop down,

Fill in Qty Returned

Fill in Qty Delivered

Fill in Price

Set Taxable 0/1 (1 = YES, 0 = Not Taxable)

Set gty Ret & Qty Del to 0 and Check INACTIVE to delete

F9 = Save and Close

For more details visit www.LongwellTech/tta



Longwell Technologies

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Longwell Technologies, Inc. www.LongwellTech.com

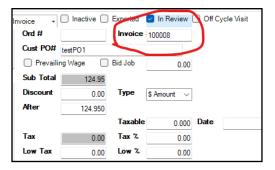
1- Open Orders

If invoices are set to REVIEW mode, they will be the Orders section.

These can be changed before they are emailed to the customer

If they were completed on a mobile device they will have:

Invoice #
In Review Checkbox

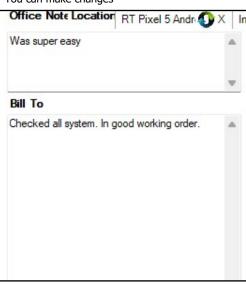


2- Review

Review notes

Office Notes: For office use only

You can make changes



5- Products & Labor

Use the Products and Labor tabs to add or edit items much like Rentals

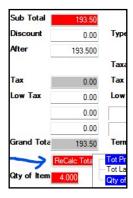
But there is no RETURN qty and additional notes fields (not displayed on invoice)

6- Calculate Totals

If there are any **RED** Boxes

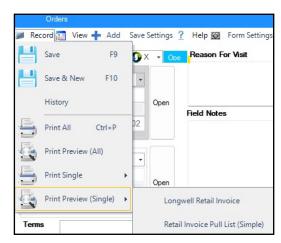
Click Re-Calc Totals

Also make sure Qty of Items totals match, if not, then change the one in RED to match the BLUE



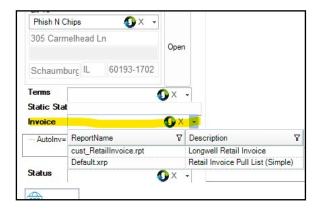
7– Preview Invoice

Record->Print Preview (Single)
Select Invoice format to Preview



8- Finish

1– Select the Invoice Format this invoice should email (if not the default one)



- 2— Look at the AutoInv email address just below the Invoice drop down. If needed, click OPEN next to the customer to change any customer data including the Auto Invoice Email address
- 3– Uncheck the In Review Checkbox F9– Save & Close Refresh Grid. This Order will be gone (now in the Invoice tab)

9- Clean Up

If Rentals were changed, added or removed, will need to adjust the quantities in the Customer Rental Tabs

If Rentals or products were added or Quantities changed will need to adjust the Mobile/HH inventories for these items