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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 reduce your billing turnaround to zero days.

Jim Taylor   May 17, 2013