



# WORKBOOK

## INVOICING

René Project  
Bluebird Advertising Company Inc.

1040 - Agreement on Master Plan finalized - V2 07/08/2010

Job list | Status | Detailed description | Scheduling | Price | Purchase orders | Expenditures | Invoice | Documents | Blog

Invoice header | Phases | Invoice lines | Comments

P	N	Act. #	Activity	Hours	H.Sale	Mat.	Ext.mrg	Ext.cost	Extra	Amount
1		100	Client meeting / brief	2.00	110.00		1.00			220.00
1		105	Project Management	7.00	110.00		1.00			770.00
1		105	Project Management	5.00	110.00		1.00			550.00
1	1	100	Client meeting / brief	2.00	110.00		1.00			220.00
1	2	105	Project Management	5.00	110.00		1.00			550.00
1	3	105	Project Management	7.00	110.00		1.00			770.00
2		110	Art Direction	6.00	120.00		1.00			720.00
2		110	Art Direction	6.00	120.00		1.00			720.00
2		115	Copy Writer	7.00	120.00		1.00			840.00
2		130	Production Management	2.00	110.00		1.00			220.00
2	4	110	Art Direction	7.00	120.00		1.00			840.00
2	5	110	Art Direction	6.00	120.00		1.00			720.00
2	6	115	Copy Writer	7.00	120.00		1.00			840.00
2	7	130	Production Management	2.00	110.00		1.00			220.00

**WorkBook** is an integrated, adaptable business management system that helps you and your employees make better business decisions based on knowledge about projects and finances. WorkBook cooperates and works together with Microsoft Dynamics software, automating and streamlining business processes that help you drive your business to success.

The **'Invoicing'** section is where you will create and send different types of invoices to your customers once work has been completed. There are 4 kinds of invoices available:

- Final invoice (will close the job and also the option for adding hours to the job)
- Credit note (you can credit something already invoiced)
- Invoice on account (will not close the job – mainly used for invoicing an amount up front)
- Partial invoice: (will not close the job – mainly used to invoice expenditures put on the job)

From the 'Invoice' tab on the job in which you want to send an invoice, presents you with all the options necessary to create and send the invoice in minimal time. Creating a price estimate and creating an invoice in WorkBook are carried out in very similar ways and this is no coincidence. Both places are made extremely alike so

that time taken to complete the invoice part of a job can be kept to a minimum.

The simplest way to complete your invoice and usually the most common way is to copy data. Select 'Copy data from the price estimate' on the current job. This automatically copies all data into your invoice making it immediately ready for quick editing of hours and materials used in the 'Invoice lines' tab.

The 'Invoicing' section also presents these advantages:

- Print layout settings so you can choose exactly what information to include in the invoice to your customer
- Divide many activities into just a few phases to make it more simple within the invoice
- Add any extra comments at the start or end of the invoice to be included with the invoice

<http://www.youtube.com/watch?v=E7e7rlhp0z8&hd=1>



# WORKBOOK

## INVOICING



WorkBook can be used in the Professional Services industry with a vertical focus primarily on these sectors:

- Consultancy
- Advertising & Design
- Communication & PR
- Architects
- Digital Agencies

### Key Benefits + System Advantages

- Easily and highly scalable
- Advanced technology supports your growing business
- Supports connectivity with customers, vendors, business partners and employees
- Robust, comprehensive functionality, all-in-one system
- Supports entities across countries, sites, languages and currencies
- Customisable, Adaptable and Modular ERP system
- World leading Project Management Tools
- Always up to date with the latest Microsoft Technology

WorkBook provides a first-class web-based business system for project and resource planning. We create a fantastic day-to-day overview and ensure optimised utilisation of resources.

We know our users and we are here for our users!

Our software contains all the tools necessary for project management aimed at project driven businesses.

WorkBook is extraordinarily user friendly which makes the system highly adaptable for end users.



### About WorkBook Software A/S

WorkBook is a specialist in developing systems for project driven organisations with tight integration to business systems like Microsoft Dynamics and other Microsoft platforms. Our system handle all working related processes - from CRM and new businesses, project and resource handling, mileage allowance, expenses, time registration, document handling, invoicing, accounting and management reports.

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