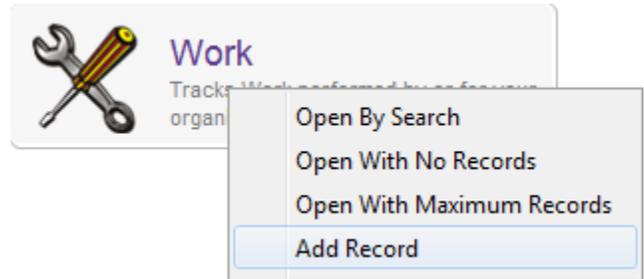


To Enter a Client Request for Billable Work:

Go to the Work capsule:

1. Enter the **Client, Contact** and any applicable location information.
2. Enter the appropriate **Work Type** and **Department** (make sure the **Billable** check box is selected – this will default if the Work Type record is set to Billable).
3. Enter in a detailed **Description** explaining the request and any information regarding who will perform the work and when it is required and/or scheduled.
4. Click on the blue disk to save.



To Complete a Billable Work Order:

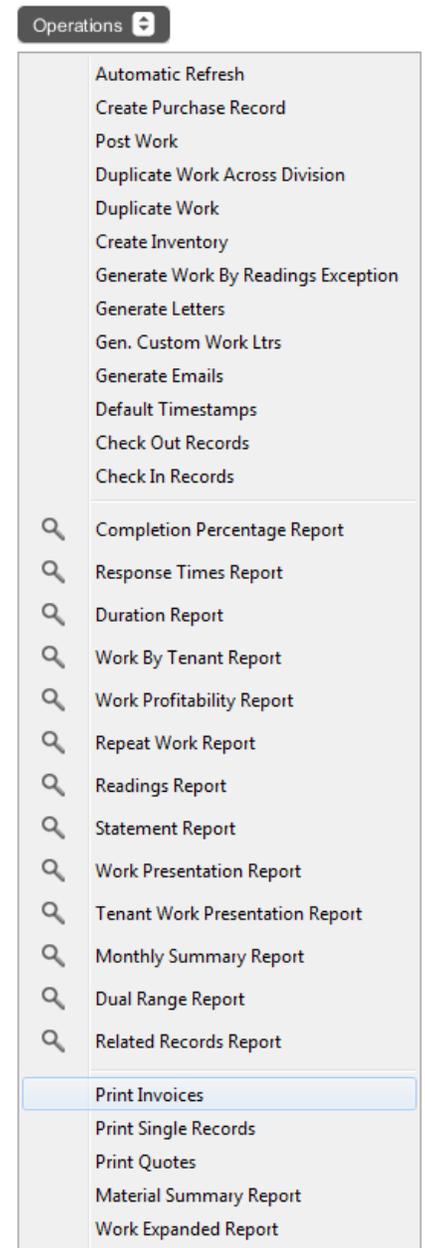
Go to the Work capsule and search for Billable, YES to YES and a Work Status Type of OPEN to OPEN.

5. Click the key to change the work order you need to complete
6. Change the Status to **CLOSED (or INVOICE)** and click the **Billable** checkbox (if it isn't already selected)
7. Enter amounts using the **Additional Amounts, Time, Material, Vendor,** and **Reading** detail tabs at the bottom of the Work form view.
8. Save the Work order by clicking on the blue disk.

To Print a Report of the Invoice Charge(s) that are Ready to be Billed:

For a single invoice for each individual Work Order:

9. Open the Work search and enter CLOSED (or INVOICE) to CLOSED (or INVOICE) in the Status range (this will open a list of all work orders that are currently at this status – if you only want the work order(s) for a single Client, enter the Client code in the search range as well).
10. Go to the **Operations** button on the Work list and select **Print Invoices**.
11. Click the printer icon to print the individual invoices.



Example of an Invoice:

	<p>Invoice DIG Property Group 50 Congress Street Boston, Massachusetts 02109</p> <p>Division: 100BE Phone: 617-542-8555 Fax: 617-542-8860</p>																	
<p><i>Bill To:</i> Celebrations Parties Carol Streamer - Corporate Administrator 100 Beacon Street North Tower Boston, MA 02109 USA</p> <p><i>Unit:</i> 100-N BEACON-1620 <i>Property:</i> 100 Beacon Street North Tower (100-N BEAC) <i>Address:</i> 100 Beacon Street Boston, MA 02109</p> <p><i>Description:</i> Need some storage shelves built for incoming shipment of goods.</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: black; color: white;"> <th style="text-align: center;">Invoice Number</th> </tr> </thead> <tbody> <tr> <td style="text-align: center; font-weight: bold;">0088</td> </tr> </tbody> </table> <p>Date Completed: May 23, 2012 Project: NEW GAME Department: MAINT Tenant: CELEB</p>	Invoice Number	0088															
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If you are printing your reports based upon Closed Dates ... you can skip this next step:

Next, if you are using an INVOICE Status ... change the Status to BILLED to mark the Work orders as having been invoiced:

You should do this immediately after printing and reviewing the report(s) that will be used to invoice – to eliminate re-invoicing a tenant for the same work order in the next billing cycle.

1. Open the Work search and enter CLOSED (or INVOICE) to CLOSED (or INVOICE) in the Status range (this will open a list of all work orders that are currently at this status – if you only want the work order(s) for a single Client, enter the Client code in the search range as well).
2. Set one of the *User Selected Columns* to **WO Reference**.
3. Click on the *Include Closed Work Orders* checkbox.

Note: THE SCHEDULING WINDOW WILL OPEN.

4. Highlight the work orders and click on the key above the Status button to open the Change Value in Status Column window.
5. Enter **BILLED** and click on blue disk.
6. With the work orders still highlighted, click on the key above the WO Reference button to open the Change Value in WO Reference Column window.
7. Enter the date they were invoiced and click on blue disk.