



THE AGENCY WORKS

Synergist Spotlight on...

Multi Job Invoicing

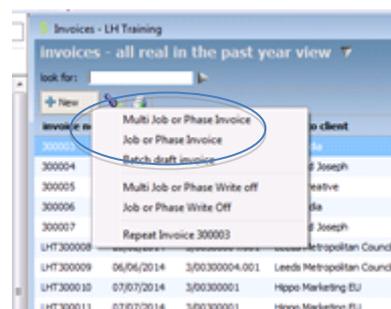
Synergist has a flexible Sales Invoicing module that allows the user to invoice a client at any point of the month. Synergist Jobs are often structured in a way to allow better reporting. Multi job invoicing allows the user to create what appears to be a single invoice to the Client. The invoice is actually linked to multiple jobs for the same client. Linking multiple jobs together into a 'Project' is an easy way of managing a group of jobs that might need invoicing together.

Multi Job Invoicing

1. In order to create a multi job invoice go to the **draft invoice list** and click on the blue cross to add a new '**multi job or phase invoice**'.

invoice no	invoice date	job / phase	billed to client
D100339	04/07/2014	1/00005677.001	Kids Club
D100334	15/05/2014	1/00005515	Rock Mill
D100330	08/04/2014	1/00005670	Mansons
D100327	08/04/2014	1/00005310	Paultons Park
D100326	25/03/2014	1/00005503	Paultons Park
D100325	25/03/2014	1/00005503	Paultons Park
D100324	07/02/2014	1/00005664	Richardson Hotels
D100316	09/01/2014	1/00005651	European

2. Select the first item in the menu '**Multi job or phase invoice**'.

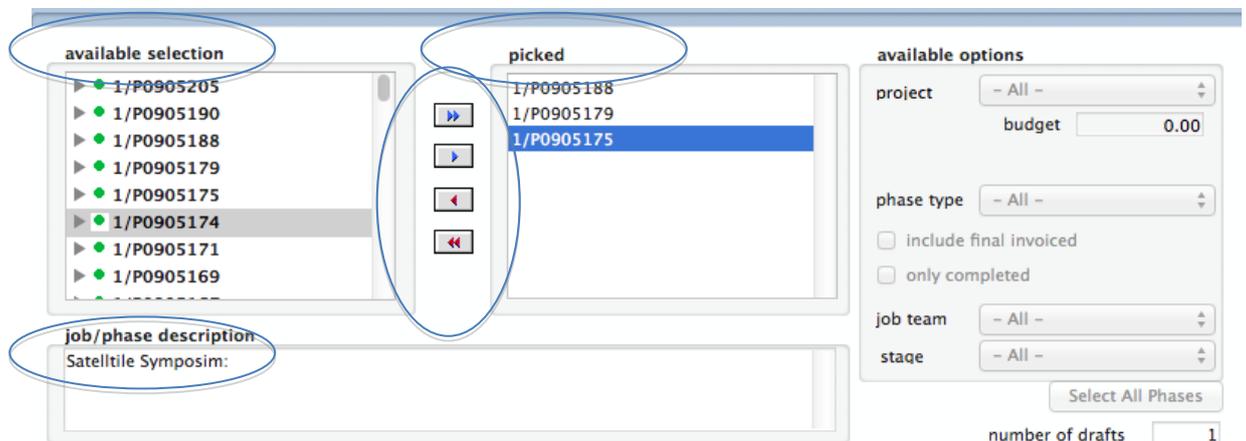


3. The screens are the same as standard invoicing and you will be asked to select a client for

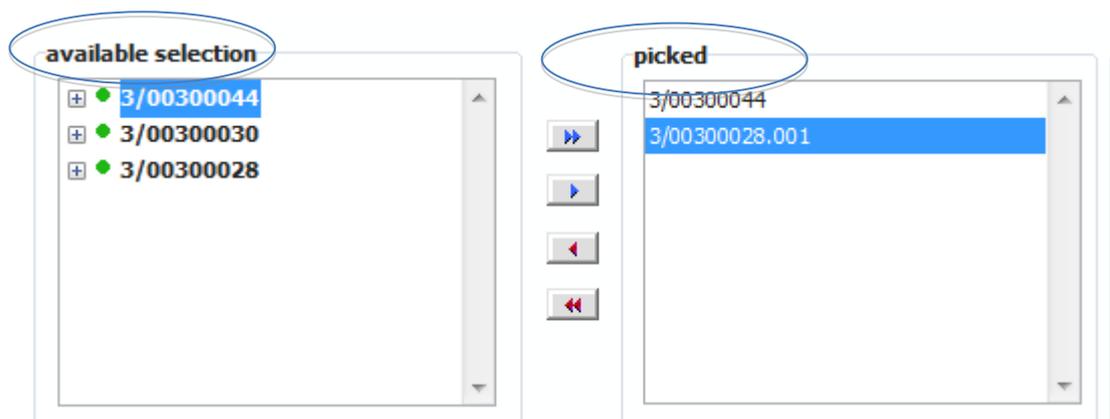


the invoice and set the invoice address as usual.

- The first screen is the standard invoice screen showing the invoice detail of date, draft number, client PO number etc. Click on “next” to move to next screen.
 - This screen will show all open jobs for the selected client in the ‘**available selection**’ list box. Use the single blue arrow between the boxes to select individual jobs to invoice, alternatively use the double blue arrow to select all jobs.
- Note Job descriptions are shown in the job/phase description box under the available selection box when you highlight a selected job



- Selecting a job will select all of the phases for the job. To select individual phases, expand the job in the available selection list by clicking on the + symbol next to the job number, use the blue arrow to move to the ‘**picked**’ box’.



- If you have grouped jobs under a ‘project’ then use the project filter to only show available jobs within a specific project.



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- The content tab will default to your Company Settings and may bring through the **'quote'** or **'show wording'** based on job description. The setting below would bring through a one line job description for each job selected in the previous screen.

content

please choose the type of content you would like to see

by

Show Wording

job

phase

by

description

break text into invoice lines

auto tickoff

The invoice can then be created and approved as normal.

Areas to note:

- The printed/PDF invoice output will not be able to display the job number as it is based on multiple job numbers. Therefore it displays the word 'various' in this field.
- Depending on your settings Synergist will want to split the value of the invoice between the phases of the jobs that are included on the multi job invoice. This is called **'phase allocations'**.

An 'auto setting' is likely to be based on estimates or quotes. On a single job invoice the invoice value is only linked to the single job. On a multi job invoice the invoice value is divided between the allocated jobs/phases and proportionally divided based on either the estimate/quote value.

Issues can arise if one or more of the jobs/phases that you are invoicing do not have an estimate or quote therefore Synergist cannot calculate the value to allocate to that particular job or phase.



Example to show multi job invoice – phase allocations

	Invoice value	Quoted values	Phase allocations	Details
Single job invoice	£5000	£5000	£5000	The full value of the invoice (£5000) is allocated to the job.
Multi Job invoice	£5000 (Invoice value is calculated by adding the two quoted values)	Job 123 =£3000 Job 456 =£2000	Job 123= £3000 Job 456= £2000	The invoice value is proportionally divided between the jobs based on the quoted value. If all jobs have a quoted value then the auto setting will accurately divide the invoice value between the relevant jobs or phases.
Multi Job invoice – no quote	£5000	Job 123 = 3000 Job 456 = zero value quote	Job 123 = £5000 Job 456 = Zero	The invoice value is proportionally divided between the jobs based on the quoted value. Job 456 does not have a quote therefore the full invoice value is incorrectly reported against Job 123.

To rectify to the above situation then always ensure the selected jobs/phases have a quoted value.

If 'Auto phase allocations' is switched off there will be an additional tab in your invoicing sequence. Here you can see and make manual adjustments to the phase allocations.



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phase allocations

line details | content | jobs/phases invoiced | allocated costs | address | financial | billing plan | notes | **phase allocations**

job
phase quote0.00

job phase	description	type	PO Cost	Time C	already allocated	allocate now
1/P0905190.001	Brand Developm			Y		5500.00
1/P0905205.001	Test for Turquoi		5.00	Y		1000.00

auto allocate

cost actual quote
 charge estimate billing plan

Auto Clear

value 6500.00
target total value 6500.00
difference 0.00

draft

Please contact the Client Services Team at The Agency Works

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Or call us on

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If you wish to discuss further

Multi Job Invoicing or phase allocations within Synergist