

Chapter 10

Invoice Templates

T.O.M. comes with a predefined Invoice template that you can print by simply selecting them from a list. Invoice templates allow you to customize your own invoices to suit your individual needs. In addition, you can create your own Invoice templates and choose the information you want printed on the invoice. T.O.M. makes it easy to create Invoice templates by simply checking and unchecking print options and entering custom titles to be printed on the invoice. You can also edit existing templates as necessary and delete templates you no longer need.

To access the various Invoice templates routines open the File menu, then click Other (Figure 10-1). Click Templates and then Invoice Templates. The Invoice Templates List screen (Figure 10-2) will be displayed.

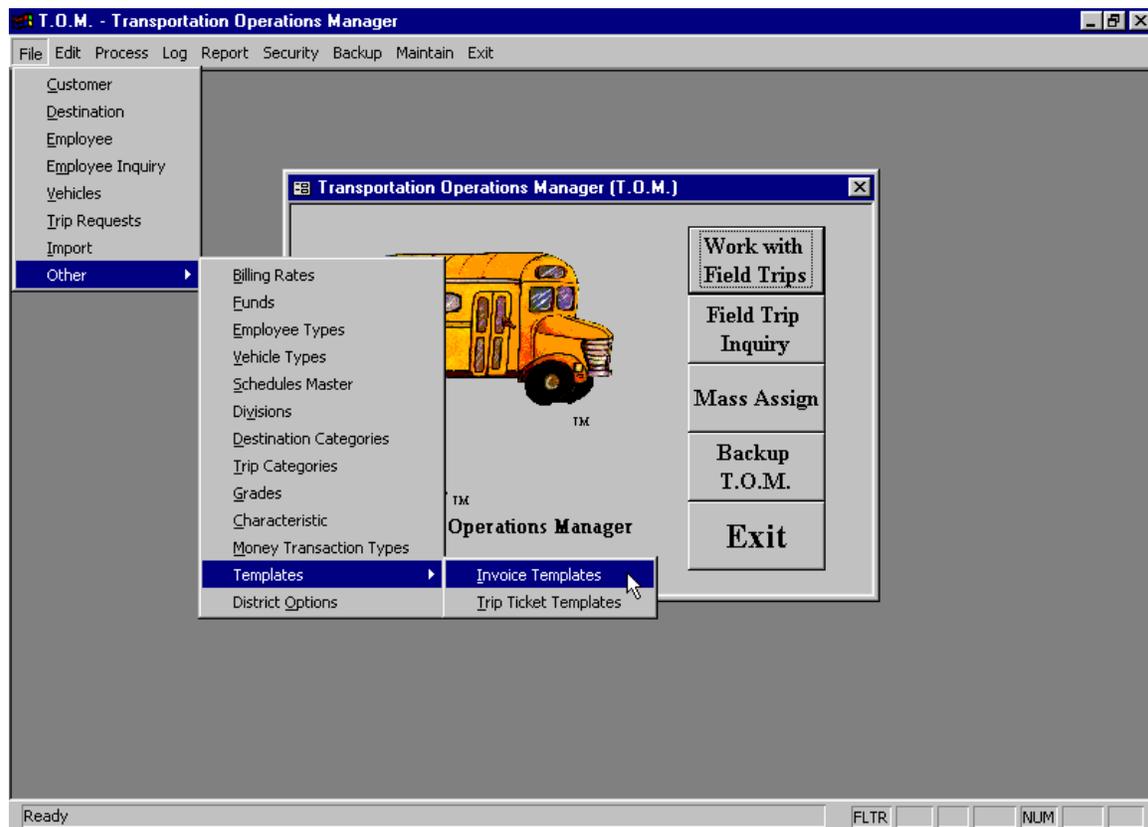


Figure 10-1. Accessing Invoice Templates on T.O.M.'s Main Screen

The Invoice Templates screen (Figure 10-2) allows you to add, change and remove items in the list. Figure 10-2 gives a brief explanation of the various function buttons offered to you when you maintain an Invoice Templates list file.

Working with Invoice Templates

Invoice templates are used to print your invoices in the format you define and with the print options you select. You may create an unlimited number of Invoice templates.

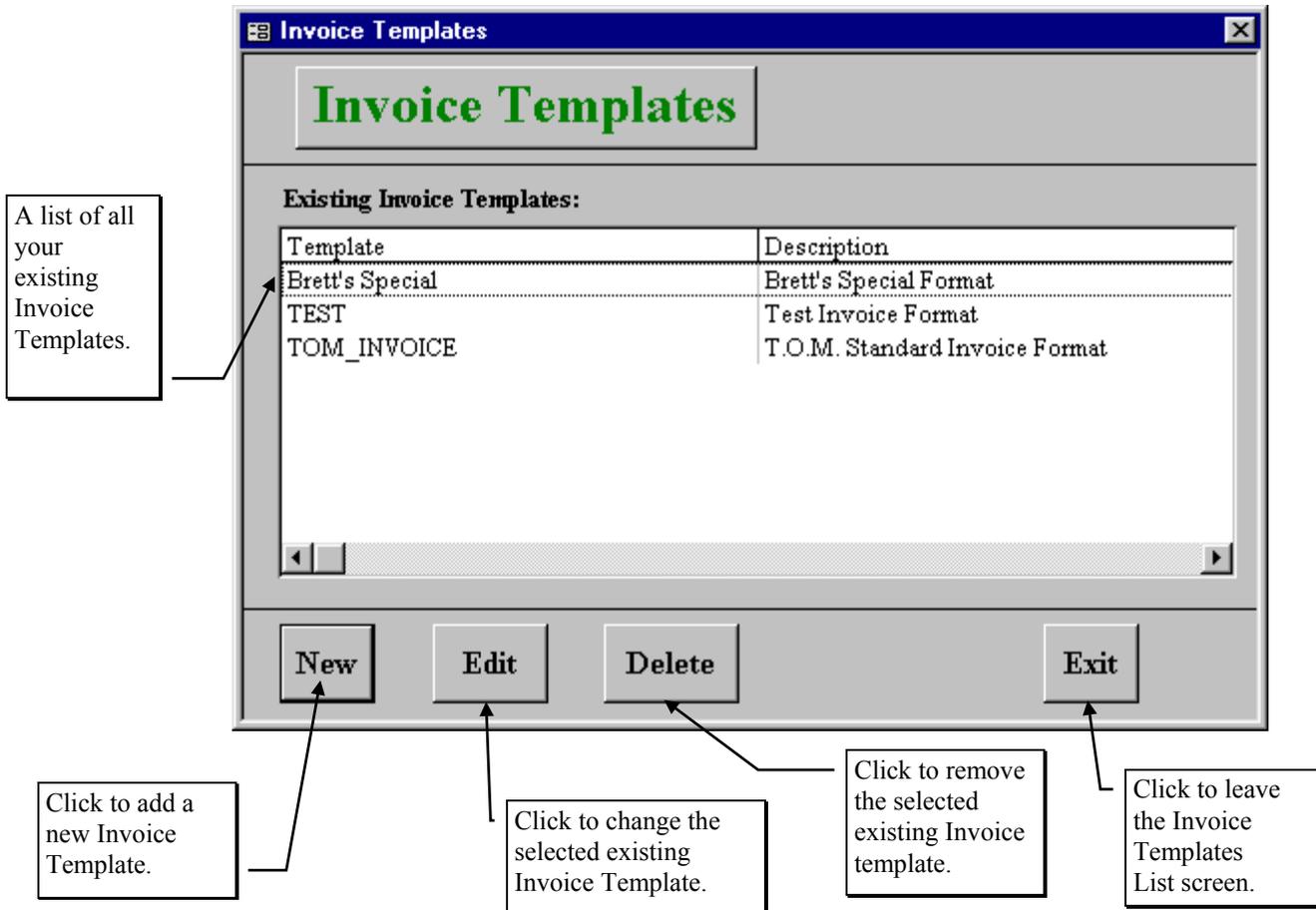


Figure 10-2. The Invoice Templates List Screen

Figure 10-2 shows the Invoice Templates List screen, which lists all of the Invoice templates that you have set up with T.O.M. From this screen you tell T.O.M. if you want to add a new invoice template, change an existing invoice template or delete an existing invoice template.

Adding a New Invoice Template

If you wish to add a new invoice template click the New button and you will be taken to the Invoice Templates Data Entry screen (Figure 10-3, Figure 10-4, Figure 10-5, Figure 10-6 and Figure 10-7). This screen will let you define the print options and titles for your invoice template. To save the invoice template information you have entered click the OK button. To exit this screen without saving the information you have entered click the Exit button. See *Invoice Templates Data Entry Screen Options* below for a complete description of print selections and title fields.

NOTE: You can see examples of the invoices created with T.O.M. at the end of this chapter Figure 10. 8 and Figure 10. 9.



Changing an Existing Invoice Template

If you wish to change an existing invoice template, then select a invoice template on the Invoice Templates List screen (Figure 10-2) by clicking the row containing the desired invoice template and then click the Edit button. You will be taken to the Invoice Templates Data Entry screen (Figure 10-3, Figure 10-4, Figure 10-5, Figure 10-6 and Figure 10-7), which will let you change any of the invoice template print options and titles. To save the invoice template information you have changed, click the OK button. To exit this screen without saving the information you have entered click the Exit button. See *Invoice Templates Data Entry Screen Options* below for a complete description of print selections and title fields.

Deleting an Existing Invoice Template

To remove an existing invoice template, then select a invoice template on the Invoice Templates List screen (Figure 10-2) by clicking the row containing the desired invoice template and then click the Delete button. T.O.M. will ask you to confirm that you really want to delete this invoice template. If you do confirm to T.O.M. that you want to delete the invoice template, T.O.M. will remove the invoice template from your T.O.M. database.

Invoice Templates Data Entry Screen Options

The Invoice Templates screen uses five tabs to help you select your print options and enter titles for different sections on the invoice, as well as a tear sheet section. These tabs are the Top Section tab (Figure 10-3), the Middle Section tab (Figure 10-4), the Charges Section tab (Figure 10-5), the Bottom Section tab (Figure 10-6) and the Tear Sheet tab (Figure 10-7). Click on the tab to see its options. The following describes the print options and titles for these tabs.

Template ID: The unique number or code that you assign an invoice template. The template ID can have letters or numbers in it and can be up to 20 characters. This field appears at the top of the Invoice Templates Data Entry screen no matter which tab section you select.

Template Description: The long description of the invoice template. This description can be a maximum of 30 characters. This field appears at the top of the Invoice Templates Data Entry screen no matter which tab section you select.

The Top Section Tab on the Invoice Templates Data Entry Screen

Click on the Top Section tab in the Invoice Templates Data Entry screen (Figure 10-3), if it is not already displayed. These selections print in the top section of your invoice.

District Address: Check this checkbox in the Print column to print the district address in the top section of the invoice. This is taken from the Address #1 and Address #2 fields as entered in the District Options Data Entry screen. (See *Chapter 4 – District Options* in this manual for details.) Uncheck this checkbox in the Print column if you do NOT want to print the district address on the invoice. The district address is printed at the top of each page if the invoice is more than one page.

Logo: Check this checkbox in the Print column to print your logo in the top section of the invoice. This is taken from the logo found in the District Options screen. (See *Chapter 4 – District Options* in this manual for details.) Uncheck this checkbox in the Print column if you do NOT want to print the logo on the invoice. The logo is printed at the top of each page if the invoice is more than one page.

Top Line: Check this checkbox in the Print column to print a line below the logo in the top section of the invoice. Uncheck this checkbox in the Print column if you do NOT want to print a line below the logo. The top line is printed at the top of each page if the invoice is more than one page.



Invoice Title: Check this checkbox in the Print column to print the invoice title in the top section of the invoice. Enter a new title or use the title already displayed in the Print column. The default title is “INVOICE”. Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

Invoice Date: Check this checkbox in the Print column to print the date you print the invoice (technically, the system date on your computer) in the top section of the invoice. Enter a new title or use the title already displayed in the Print column. The default title is “INVOICE DATE:”. Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

The screenshot shows a window titled "Invoice Template" with a close button in the top right corner. Below the title bar is a large header box containing the text "Invoice Template" in a purple serif font. Underneath are two text input fields: "Template ID:" containing "Brett's Special" and "Description:" containing "Brett's Special Format". Below these are five tabs: "Top Section", "Middle Section", "Charges Section", "Bottom Section", and "Tear Sheet". The "Top Section" tab is selected. Inside this tab, there is a table with two columns: "Print:" and "Title:". The rows are as follows:

	Print:	Title:
District Address:	<input checked="" type="checkbox"/>	
Logo:	<input type="checkbox"/>	
Top Line:	<input type="checkbox"/>	
Invoice Title:	<input type="checkbox"/>	
Invoice Date:	<input checked="" type="checkbox"/>	INVOICE DATE:
Estimate Date:	<input checked="" type="checkbox"/>	ESTIMATE DATE:
Internal #:	<input checked="" type="checkbox"/>	INTERNAL #:
Departure Date:	<input checked="" type="checkbox"/>	DATE OF DEPARTURE:
Tripnum at Top:	<input type="checkbox"/>	

At the bottom of the window are two buttons: "OK" on the left and "Exit" on the right.

Figure 10-3. The Top Section Tab on the Invoice Templates Data Entry Screen

Estimate Date: When you print an estimate for a field trip using this invoice template you can state whether you want the estimate date to print on the estimate. Check this checkbox in the Print column to print the date you print the estimate (technically, the system date on your computer) in the top section of the invoice. (See Chapter 1 – Entering Field Trips, Printing Estimates, Using the Field Trip Inquiry in the T.O.M. User Guide for details.) Enter a new title or use the title already displayed in the Print column. The default title is “ESTIMATE DATE:”. Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

Internal #: Check this checkbox in the Print column to print the internal field trip number in the top section of the invoice. The internal field trip number is taken from the Field Trip # field assigned by



T.O.M. when you create a new field trip in the Field Trips / Search Selection screen. (See *Chapter 1 – Entering Field Trips, Printing Estimates, Using the Field Trip Inquiry* in the *T.O.M. User Guide* for details.) Enter a new title or use the title already displayed in the Print column. The default title is “INTERNAL #:”. Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

Departure Date: Check this checkbox in the Print column to print this field on the invoice. This is taken from the Departure Date field as entered in the Detailed Field Trip screen. (See *Chapter 1 – Entering Field Trips, Printing Estimates, Using the Field Trip Inquiry* in the *T.O.M. User Guide* for details.) Enter a new title or use the title already displayed in the Print column. The default title is “DATE OF DEPARTURE:”. Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

Tripnum at Top: Check this checkbox in the Print column to print the field trip number in the top section of the invoice. The internal field trip number is taken from the Field Trip # field assigned by T.O.M. when you create a new field trip in the Field Trips / Search Selection screen. (See *Chapter 1 – Entering Field Trips, Printing Estimates, Using the Field Trip Inquiry* in the *T.O.M. User Guide* for details.) Enter a new title or use the title already displayed in the Print column. The default title is “Invoice #:”. Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

The Middle Section Tab on the Invoice Templates Data Entry Screen

Click on the Middle Section tab in the Invoice Templates Data Entry screen (Figure 10-4), if it is not already displayed. These selections print in the middle section of your invoice.

	Print:	Title:
Prefix:	<input type="checkbox"/>	
Fund:	<input checked="" type="checkbox"/>	FUND:
Customer:	<input checked="" type="checkbox"/>	CUSTOMER:
Contact:	<input checked="" type="checkbox"/>	CONTACT:
Purpose:	<input checked="" type="checkbox"/>	PURPOSE:
Grade:	<input checked="" type="checkbox"/>	GRADE:
Customer Phone:	<input checked="" type="checkbox"/>	PHONE:
Destination:	<input checked="" type="checkbox"/>	DESTINATION:



Figure 10-4. The Middle Section Tab on the Invoice Templates Data Entry Screen

Prefix: Check this checkbox in the Print column to print the prefix in the middle section of the invoice. This is taken from the Prefix field on the District Options Data Entry screen. (See *Chapter 4 – District Options* in this manual for details.) Enter a new title or use the title already displayed in the Print column. The default title is “PREFIX:”. Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

Fund: Check this checkbox in the Print column to print the fund in the middle section of the invoice. This is taken from the Fund field as entered in the Detailed Field Trip screen. (See *Chapter 1 – Entering Field Trips, Printing Estimates, Using the Field Trip Inquiry* in the *T.O.M. User Guide* for details.) Enter a new title or use the title already displayed in the Print column. The default title is “FUND:”. Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

Customer: Check this checkbox in the Print column to print the customer’s name and address in the middle section of the invoice. This is taken from the Name and Address fields corresponding to the Customer # as entered in the Customer Data Entry screen. (See *Chapter 5 – Customers* in this manual for details.) Enter a new title or use the title already displayed in the Print column. The default title is “CUSTOMER:”. Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

Contact: Check this checkbox in the Print column to print the contact in the middle section of the invoice. This is taken from the Contact field as entered in the Detailed Field Trip screen. (See *Chapter 1 – Entering Field Trips, Printing Estimates, Using the Field Trip Inquiry* in the *T.O.M. User Guide* for details.) Enter a new title or use the title already displayed in the Print column. The default title is “CONTACT:”. Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

Purpose: Check this checkbox in the Print column to print the purpose in the middle section of the invoice. This is taken from the Purpose field as entered in the Detailed Field Trip screen. (See *Chapter 1 – Entering Field Trips, Printing Estimates, Using the Field Trip Inquiry* in the *T.O.M. User Guide* for details.) Enter a new title or use the title already displayed in the Print column. The default title is “PURPOSE:”. Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

Grade: Check this checkbox in the Print column to print the grade in the middle section of the invoice. This is taken from the Grade field as entered in the Detailed Field Trip screen. (See *Chapter 1 – Entering Field Trips, Printing Estimates, Using the Field Trip Inquiry* in the *T.O.M. User Guide* for details.) Enter a new title or use the title already displayed in the Print column. The default title is “GRADE:”. Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

Customer Phone: Check this checkbox in the Print column to print the customer phone number in the middle section of the invoice. This is taken from the Phone Number field as entered in the Customer Data Entry screen. (See *Chapter 5 – Customers* in this manual for details.) Enter a new title or use the title already displayed in the Print column. The default title is “PHONE:”. Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

Destination: Check this checkbox in the Print column to print the destination in the middle section of the invoice. This is taken from the Description field corresponding to the Destination # as entered in the Destination Data Entry screen. (See *Chapter 8 – Destinations* in this manual for details.) Enter a new title or use the title already displayed in the Print column. The default title is “DESTINATION:”. Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

The Charges Section Tab on the Invoice Templates Data Entry Screen



Click on the Charges Section tab in the Invoice Templates Data Entry screen (Figure 10-5), if it is not already displayed. These selections print in the “charges” section of your invoice.

Charge Line #1: Check this checkbox in the Print column to print a dividing line with a title at the top of the charges section of the invoice. Enter a new title or use the title already displayed in the Print column. The default title is “CHARGES:”. Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

Miles Hours Section: Check this checkbox in the Print column to print field trip mileage and hours in the charges section of the invoice. This is taken from the mileage and hours information for the field trip found in the Detailed Field Trip screen. (See *Chapter 1 – Entering Field Trips, Printing Estimates, Using the Field Trip Inquiry* in the *T.O.M. User Guide* for details.) Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

	Print:	Title:
Charge Line #1:	<input checked="" type="checkbox"/>	CHARGES
Miles Hours Section:	<input checked="" type="checkbox"/>	
Flat Charges Section:	<input checked="" type="checkbox"/>	
Employee Detail Section:	<input checked="" type="checkbox"/>	
Step Section:	<input type="checkbox"/>	
Charge Line #2:	<input checked="" type="checkbox"/>	

Figure 10-5. The Charges Section Tab on the Invoice Templates Data Entry Screen

Flat Charges Section: Check this checkbox in the Print column to print the flat charges in the charges section of the invoice. This is taken from the Flat Amounts fields in the Detailed Field Trip screen. (See *Chapter 1 – Entering Field Trips, Printing Estimates, Using the Field Trip Inquiry* in the *T.O.M. User Guide* for details.) Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

Employee Detail Section: Check this checkbox in the Print column to print the employee detail information in the charges section of the invoice. This is taken from the Trip Driver Information screen for



the field trip. (See *Chapter 2 – Assigning Drivers & Vehicles to Field Trips, Printing Trip Tickets & Garage Check Lists* in the *T.O.M. User Guide* for details.) Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

Step Section: Check this checkbox in the Print column to print the step rates in the charges section of the invoice. If you have setup your Billing Rate to have Billing Instructions that use the Step Rate method of billing you will probably want this type of charges section. It breaks down the charges based on the two mileage and hourly step rates that you have setup in your Billing Rate screen. Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

Charge Line #2: Check this checkbox in the Print column to print a dividing line at the bottom of the charges section of the invoice. Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

The Bottom Section Tab on the Invoice Templates Data Entry Screen

Click on the Bottom Section tab in the Invoice Templates Data Entry screen (Figure 10-6), if it is not already displayed. These selections print in the bottom section of your invoice.

The screenshot shows a window titled "Invoice Template" with a close button in the top right corner. The main title "Invoice Template" is displayed in a large purple font. Below the title, there are two text input fields: "Template ID:" containing "Brett's Special" and "Description:" containing "Brett's Special Format". A horizontal tab bar is located below the description field, with five tabs: "Top Section", "Middle Section", "Charges Section", "Bottom Section", and "Tear Sheet". The "Bottom Section" tab is currently selected. Below the tabs is a table with two columns: "Print:" and "Title:". The table contains the following rows:

	Print:	Title:
Invoice Total:	<input checked="" type="checkbox"/>	TOTAL INVOICE:
District Comment:	<input checked="" type="checkbox"/>	
Customer Comment:	<input checked="" type="checkbox"/>	
Template Comment:	<input type="checkbox"/>	
Invoice Comment:	<input checked="" type="checkbox"/>	
District Name:	<input checked="" type="checkbox"/>	
District Address:	<input checked="" type="checkbox"/>	
District Phone:	<input checked="" type="checkbox"/>	PHONE:

At the bottom of the window, there are two buttons: "OK" on the left and "Exit" on the right.

Figure 10-6. The Bottom Section Tab on the Invoice Templates Data Entry Screen



Invoice Total: Check this checkbox in the Print column to print the invoice total in the bottom section of the invoice. This is taken from the total cost for the selected field trip. Enter a new title or use the title already displayed in the Print column. The default title is “TOTAL INVOICE:”. Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

District Comment: Check this checkbox in the Print column to print the district comment in the bottom section of the invoice. This is taken from the District Billing Comments field as entered in the District Options Data Entry screen. (See *Chapter 4 – District Options.*) Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

Customer Comment: Check this checkbox in the Print column to print the customer comment in the bottom section of the invoice. This is taken from the Comments field as entered in the Customer Data Entry screen. (See *Chapter 5 – Customers.*) Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

Template Comment: Check this checkbox in the Print column to print a template comment in the bottom section of the invoice. Type in the text for the template comment in the Title field. Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

Invoice Comment: Check this checkbox in the Print column to print the invoice comment in the bottom section of the invoice. This is taken from the Invoice Comment field in the Detailed Field Trip screen. (See *Chapter 1 – Entering Field Trips, Printing Estimates, Using the Field Trip Inquiry* in the *T.O.M. User Guide* for details.) Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

District Name: Check this checkbox in the Print column to print this field on the invoice. This is taken from the District Name field as entered in the District Options Data Entry screen. (See *Chapter 4 – District Options.*) Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

District Address: Check this checkbox in the Print column to print this field on the invoice. This is taken from the Address #1 and Address #2 fields as entered in the District Options Data Entry screen. (See *Chapter 4 – District Options.*) Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

District Phone: Check this checkbox in the Print column to print this field on the invoice. This is taken from the Phone field as entered in the District Options Data Entry screen. (See *Chapter 4 – District Options.*) Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

The Tear Sheet Tab on the Invoice Templates Data Entry Screen

Click on the Tear Sheet tab in the Invoice Templates Data Entry screen (Figure 10-7), if it is not already displayed. These selections print in the tear sheet portion of your invoice.

Tear Line: Check this checkbox in the Print column to print this field on the invoice. This is printed along the tear line of the invoice. Enter a new title or use the title already displayed in the Print column. The default title is “Please Return this Portion of the Invoice with your Payment”. Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

Trip Number: Check this checkbox in the Print column to print this field on the invoice. This is taken from the Field Trip # field assigned by T.O.M. when you create a new field trip. (See *Chapter 1 – Entering Field Trips, Printing Estimates, Using the Field Trip Inquiry* in the *T.O.M. User Guide.*) Enter a new title or use the title already displayed in the Print column. The default title is “TRIP#:”. Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.



Departure Date: Check this checkbox in the Print column to print this field on the invoice. This is taken from the Departure Date field as entered in the Detailed Field Trip screen. (See Chapter 1 – Entering Field Trips, Printing Estimates, Using the Field Trip Inquiry in the T.O.M. User Guide.) Enter a new title or use the title already displayed in the Print column. The default title is “TRIP DATE:”. Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

	Print:	Title:
Tear Line:	<input checked="" type="checkbox"/>	Please Return this Portion of the Invoice with your Payment
Trip Number:	<input checked="" type="checkbox"/>	TRIP#:
Departure Date:	<input checked="" type="checkbox"/>	TRIP DATE:
Customer:	<input checked="" type="checkbox"/>	CUSTOMER:
Trip Amount:	<input checked="" type="checkbox"/>	INVOICE AMOUNT:

Figure 10-7. The Tear Sheet Tab on the Invoice Templates Data Entry Screen

Customer: Check this checkbox in the Print column to print this field on the invoice. This is taken from the Name field corresponding to the Customer # as entered in the Customer Data Entry screen. (See Chapter 5 – Customers in this manual.) Enter a new title or use the title already displayed in the Print column. The default title is “CUSTOMER:”. Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.

Trip Amount: Check this checkbox in the Print column to print this field on the invoice. This is taken from the total cost for the selected field trip. Enter a new title or use the title already displayed in the Print column. The default title is “INVOICE AMOUNT:”. Uncheck this checkbox in the Print column if you do NOT want to print this field on the invoice.



Sample Invoices



PARADISE VALLEY SCHOOL DISTRICT # 69
20621 North 32nd Street
Phoenix, AZ 85024

INVOICE

INVOICE DATE: 4/4/2000

DATE OF TRIP: 2/7/2000

BUD#: 8 - STUDENT ACTIVITY

CUSTOMER: SUNRISE MIDDLE 4960 E. ACOMA SCOTTSDALE, AZ 85254	PURPOSE: 1-W/C BUS PO: 57133
CONTACT: M.WILLIAMS	PHONE: () 493-6030

DESTINATION: AMERICAN WEST ARENA

CHARGES

MILEAGE:	90 @	\$0.60	PER MILE =	\$0.00	TOTAL CHARGES FOR MILES
DRIVER TIME:	9.00 @	\$13.00	PER HOUR =	\$123.00	TOTAL CHARGES FOR TIME

TOTAL INVOICE: \$73.80

Please Write Trip # on Check

PARADISE VALLEY SCHOOL DISTRICT # 69
20621 North 32nd Street
Phoenix, AZ 85024

PHONE: 493-6320

Please Return This Portion of the Invoice with your Payment

TRIP #: 10267
TRIP DATE: 2/7/2000
CUSTOMER: 97 SUNRISE MIDDLE
INVOICE AMOUNT: \$73.80

Top Section

Middle Section

Charges section with Miles / Hours Section

Bottom Section

Tear Section

Figure 10. 8 – Sample Invoice



PARADISE VALLEY SCHOOL DISTRICT # 69
20621 North 32nd Street
Phoenix, AZ 85024

INVOICE

INVOICE DATE: 4/25/2000

DATE OF TRIP: 2/3/1999

FUND: 9 - PTO / PTSA

CUSTOMER: GREENWAY MIDDLE 3002 E. NISBET RD. PHOENIX, AZ 85032	PURPOSE: W/C BUS W/3 HOOKUPS PO: GRADE: PHONE: () 493-6300
CONTACT: cinicove	

DESTINATION: OUT OF AFRICA WILDLIFE PARK

----- CHARGES -----

Flat Charges Section.

	\$0.00		\$0.00
	\$0.00		\$0.00
	\$0.00	TOTAL DRIVER EXPENSE FOR THE TRIP:	\$0.00

Employee Detail Charges Section

VEHICLE: 89	JOHN TURNER	66.00 Miles	X	0.60 Mileage Rate	+		
		4.50 Hours	X	13.00 Hourly Rate	+		
		0.00 OT Hours	X	0.00 OTHourly Rate	+		
		0.00 Wait Hrs	X	0.00 Wait Hrly Rate	+	0.00	Emp. Exp.
		0.00 OTWait Hrs	X	0.00 OT Wait Hrly Rate	=	\$98.10	
Odometer: Beg: 121692		Arrive: 0	Leave: 0	End: 121751			

TOTAL INVOICE: \$98.10

Please Write Trip # on Check

PARADISE VALLEY SCHOOL DISTRICT # 69
20621 North 32nd Street
Phoenix, AZ 85024

PHONE: 493-6320

Figure 10. 9 – Sample Invoice – with Flat Charges and Employee Detail Charges Sections