

BILLING MODULE

Manage your products and services and customer work orders and invoices in IssueTrak.

With the billing module you can invoice your customers for products and services directly in IssueTrak. Personalize the invoice template to your company's needs, input your products and services, update your company records with the appropriate billing information and you are ready to invoice your customers' right from IssueTrak.

Highlights include:

- Add and/or edit line items for an issue on one screen. Easily adjust item rates and insert comments for each line item.
- Apply labor time to your customers' service contracts while adding and editing line items.
- Create printable work orders for customers to authorize work.
- Line items in customer issues can be easily used to generate customer invoices directly from IssueTrak.
- Grant users permission to enter line items and create invoices and work orders. Administrative rights to the billing module can also be granted to a user or group of users.
- Products and service records include three optional, user-defined text fields with checkboxes to indicate whether an item is taxable and/or billable. Items can also have protected rates, not visible to non-admin users, and be marked inactive.
- Add a billing reference code and default sales tax rate to each customer record.
- Line items can be exported to a comma separated file and view at any time or imported into an alternate billing system.

For additional information or a guided demonstration of IssueTrak's Billing module, please contact us at info@issuetrak.com or 866-477-8387.

The screenshot displays the IssueTrak web application interface. At the top, there is a navigation bar with 'Home', 'Main Menu', 'Administration', 'Billing', 'Surveys', and 'Asset Management'. The 'Billing' section is active, showing a 'Products/Services List' table. The table has columns for Record ID, Item, Name, Description, Rate, Billable, Taxable, and Protected. A search bar and pagination controls are also visible. Below the table, an 'Invoice' form is shown, including a 'BILL TO' section with a company name and address, and a table of line items with columns for ITEM, DESCRIPTION, QTY, RATE, and AMOUNT. The total amount is listed as 1,529.90.

Record ID	Item	Name	Description	Rate	Billable	Taxable	Protected
1	1000	Admin/User	Admin 1	200.00	True	False	True

ITEM	DESCRIPTION	QTY	RATE	AMOUNT
Service Call	Problem found or wiring of the motor	10	100.00	1,000.00
Warranty	Warranty to get to customer	50	0.50	25.00
TOTAL				1,529.90