Jobs & Billing

Jobs on tickets, prices and taxes on loads, invoices, payments and statements. Setup → System → Jobs, Setup → Pricing, and the Billing menu.

> The two switches are separate: **Use Jobs** works without billing, and billing works without jobs. With both off nothing here shows anywhere.

Jobs

A job is a project, field or contract a load goes to — a bridge job, the north pivot, a harvest contract. With **Use Jobs** on, a Job field follows Customer on the office weigh forms, the kiosk and the phone. It is always optional unless a commodity's required fields ask for it, and several customers can haul to the same job.

- Add jobs on **Database** → **Tables** → **Jobs**. Like the other lists, each job can be offered at the office, the kiosk and the phone separately.
- The kiosk and phone ask for a job after the customer (Setup → Prompts sets inbound, outbound or neither); drivers can skip it.
- Rename it on Setup → Schema if your site says "Project" or "Field".
- With billing on, a job can also carry an address, a PO number printed on its invoices, and **Tax Exempt**.

Billing settings

Setting	What it does
Use Pricing & Billing	Turns on prices on loads, the Billing menu (managers and admins), and the billing columns on Tables → Customers and Commodities. It is on Setup → **Configuration**, which only the support login sees; the settings below are on Setup → **Pricing**, a tab that only shows while billing is on.
Next Invoice #	The number the next invoice gets. Numbers never repeat. A site with a **Site Number** (set by support) numbers its invoices in its own block: site 2 from 2,001,001.
Invoice Terms (days)	Days until an invoice is due, unless the customer has its own Terms. 0 = due on receipt.
Price on Ticket	Prints the load's amount, tax and total on the ticket.
Invoice Layout, Statement Layout	Open the invoice or statement layout in the Report Designer.
Invoice Message, Statement Message	Printed at the bottom of every invoice or statement, and in the email that sends it.

The company name and address on invoices and statements are the ticket header lines (Setup → Company & Ticket).

Customers and commodities

With billing on, Tables → Customers gains:

- **Address, Phone, Billing Email** — the bill-to block, and where invoices and statements are emailed (several addresses separated by commas).

- **On Account** — Yes: loads are invoiced later. No: the customer pays at the scale and each load becomes a paid cash sale.
- **Tax Exempt** and **Exemption #** (printed on invoices), **Terms (days)**, and **Invoice per Job** — a separate invoice for each job instead of one for everything.

Tables → Commodities gains **Taxable**. For pricing per unit (bushels, yards) set the commodity's Reporting Unit and Lbs per Unit.

The price list

Billing → Price List. Each row has a **Rate** per net weight, a **Flat Charge** per load (a scale fee), and a **Minimum Charge** — any of them, or all three. A rate is per Ton (2,000 lb), Metric Ton, Cwt (100 lb), Lb, Kg, or the commodity's own Unit. Optional From / To dates limit a rate to a season or a contract.

A row with no customer, job or commodity is the **default** for every load. Filling any of them makes a **special rate**. For each load the most specific row wins, in this order:

1. Job + customer + commodity, job + customer, job + commodity, then job alone — a job's price applies to everyone hauling to it.
2. Customer + commodity, then customer alone.
3. Commodity alone.
4. The default.

This is worked out **field by field**: a special rate with only a Rate still gets its Flat Charge and Minimum from the next row down, so a special rate only has to say what is different.

Worked example — default $12.50 per ton plus a $5 flat charge; Smith Farms' Silage $9 per ton; the Highway 12 job $7 per ton with a $100 minimum:

Load	Price
40,000 lb of hay, any customer	20 tons × $12.50 + $5 = $255.00, plus tax
40,000 lb of Silage, Smith Farms	20 tons × $9 + $5 (default flat) = $185.00, plus tax
4,000 lb to Highway 12, anyone	2 tons × $7 + $5 = $19, raised to the $100 minimum

> **Try a Load…** prices a made-up load without saving anything. After changing rates or taxes, **Reprice Loads** works the price out again on every load not yet invoiced — invoiced loads always keep the price they were billed at.

Taxes

Billing → Taxes. Add each tax by name and percent (State 6.5%, County 1.2%). A load is taxed when its commodity is Taxable and neither the customer nor the job is Tax Exempt. Tax is on the whole load: weight charge plus flat charge.

- A tax with a **Location** only applies to loads weighed there.
- A tax with a **Job** replaces the location's taxes for that job's loads — for a job in another county or state.

A load's price

Every completed load is priced when it is saved, from any screen. The ticket's Edit page shows a **Price** panel with the rate, charges, each tax and the total. A manager can **Set Price** by hand for one load (the price list then leaves it alone) and **Use Price List** to go back. A load with no matching rate has no price and can't be invoiced

— Billing → Create Invoices lists these.

Paying at the scale

For a customer with On Account off, **Take Payment** (on the ticket's Price panel, or Billing → Collect at Scale) records how it was paid — cash, check, card, ACH — works out the change, and turns the load into a paid **cash sale** invoice that opens as the receipt. Operators can take payment; everything else in billing is for managers and admins. Card payments are recorded, not processed — a card processor can be added later.

Invoicing

1. Billing → **Create Invoices**: pick the dates and (optionally) a customer, then **Show Loads**. Untick any load to leave for later.
2. Set the invoice date and **Create Invoices**. Each customer gets one invoice (or one per job with Invoice per Job), numbered from Next Invoice #, due by its terms.
3. On the **Invoices** tab, tick invoices and **Print Selected** (one PDF, each invoice on its own page) or **Email Selected** (each to its customer's Billing Email, the PDF attached).

Open an invoice to add a typed-in charge or credit (freight, a fuel surcharge — taxable or not), edit its PO number and printed notes, email it to any address, record a payment against it, or **Void** it. Voiding frees its loads to be invoiced again and puts payments made against it back on account.

Payments

Billing → Payments → **Record Payment**: the customer, date, amount, method and check number. Apply it to one invoice, or leave it **On account** — it then pays the oldest open invoices first. An invoice shows Paid once it is covered. A mistaken payment can be voided. **Accounts** shows every customer's billed, paid, balance and past-due amounts.

Statements

Billing → Statements: pick the period (the To date is the statement date) and **Show**. Each statement has the balance brought forward, every invoice and payment in the period with a running balance, the amount due, and how old it is — current (up to 30 days), 31–60, 61–90 and over 90, by invoice date. Customers with no balance and no activity are left out. Print or email them the same way as invoices.

Invoice and statement layouts

Both are ordinary report layouts: Setup → Report Designer, or the Invoice Layout / Statement Layout buttons on Setup → Pricing. Move, restyle or delete anything, add your logo, and save. The Field List has the invoice or statement fields, its **Lines** (loads, or invoices and payments), and for invoices its **Taxes**. Preview shows your latest invoices, or this month's statements. Header1–Header4 are the ticket header lines.

> Email needs Setup → Email set up first; until then the Email buttons are greyed out.