

MyriadApp

**On-Demand Business
Applications**

*How to invoice billable
activities from Calendar*



Invoice Billable Activities

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How to Invoice a Billable Activity from Calendar

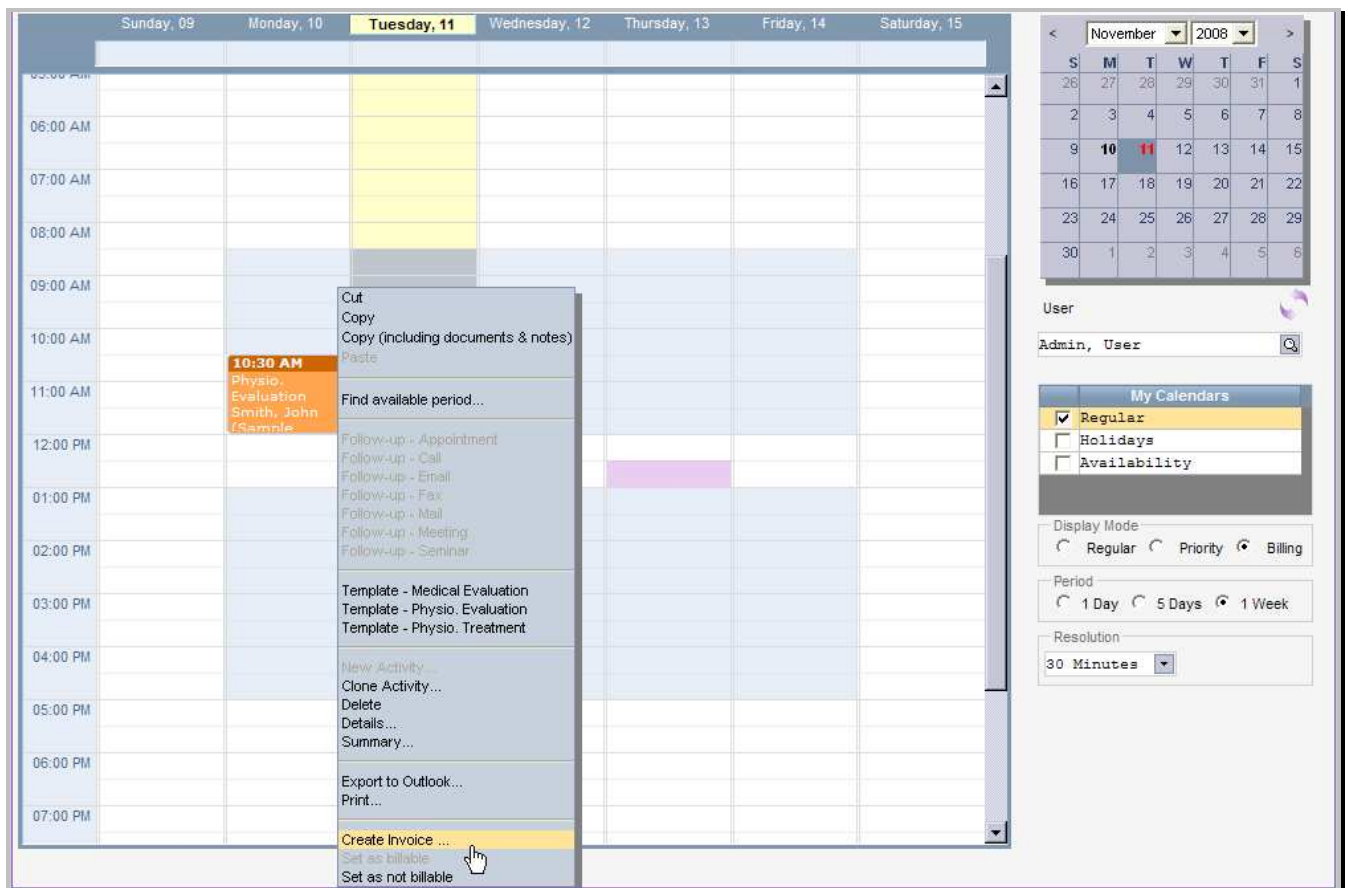
Go to Calendars application



Description

Select Sales process and then Calendars application.

Select Billable Activities to be Invoiced



Description

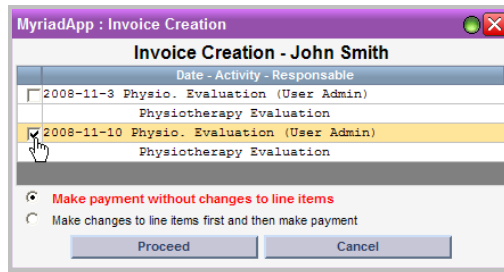
An activity is billable when its Billing Type is set to “Billable”.

Billable activities appear in orange when calendar Display Mode is set to “Billing”.

Right-click on selected activity time block to access contextual menu.

Select "Create Invoice..." from contextual menu.

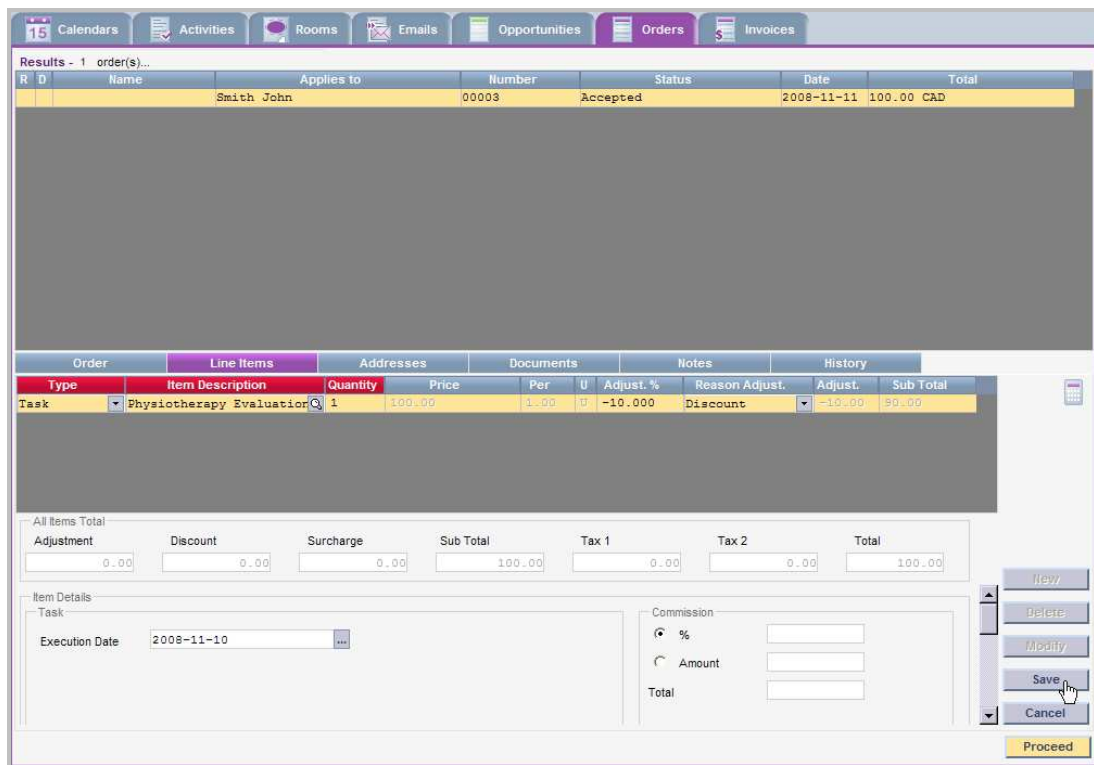
All unbilled activities from current day or from the past which apply to the same contact get listed and can be excluded or not from Invoicing process:



Next step can then be to modify items to be billed (add a rebate, add a new item) or create the invoice immediately.

Use the **Proceed** button when choices are completed.

Modify Items to be Invoiced (optional step)



Description

Order(s) get(s) created automatically by the system and Orders application is opened on Line Items tab so that items can be added or modified before invoice is produced.

Once changes are completed, use the **Proceed** button.

Manage Invoice

R	ID	Name	Applies to	Number	Order Number(s)	Status	Date	Total
		Smith John		00003	00003	Approved	2008-11-11	100.00 CAD

Invoice amount total: 100.00 Invoice amount remaining: 100.00

Payment Details

Amount: 100.00 Mode: Cash Status: Approved Date: 2008-11-11

Description: [Empty]

Mode dropdown options: Cash, Cheque, Debit, MasterCard

Buttons: New, Modify, Save, Cancel, Close

Description

Invoice gets created automatically by the system and Invoices application is opened on Payments tab so that payments can be added.

Invoice or receipt can be printed using the Printer button 

Once changes are completed, use the **Close** button to go back to Calendar.

Billed activities in Calendar appear in green when Display Mode is set to "Billing".