



Eaco Invoice Schemas

USER GUIDE

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INTRODUCTION

"The best way to predict the future is to create it" - Abraham Lincoln

When you're interacting with Suppliers and Clients on a job by job basis, Eaco can power you with a bunch of magic spells you can put on jobs to automate the mountain of paperwork required behind the scenes. Gone will be the days of quotes and invoices flying around everywhere – overloading and overwhelming back office staff – and grinding business to a halt. Eaco's Invoice Schemas feature will help you keep up with this volume of paperwork and even better, it can play an integral role in keeping you well ahead of the pack.

For example, you have established agreements with Suppliers: you know exactly what you are going to pay them and when you're going to pay them. You have the facts, so why not simply automate the invoicing process? That's exactly where the Eaco Invoice Schemas feature comes into play. Working in conjunction with the Eaco configurations for Service Templates and Invoice Transformations, Invoice Schemas enable you to automatically create invoices at predetermined rates on behalf of your Suppliers.

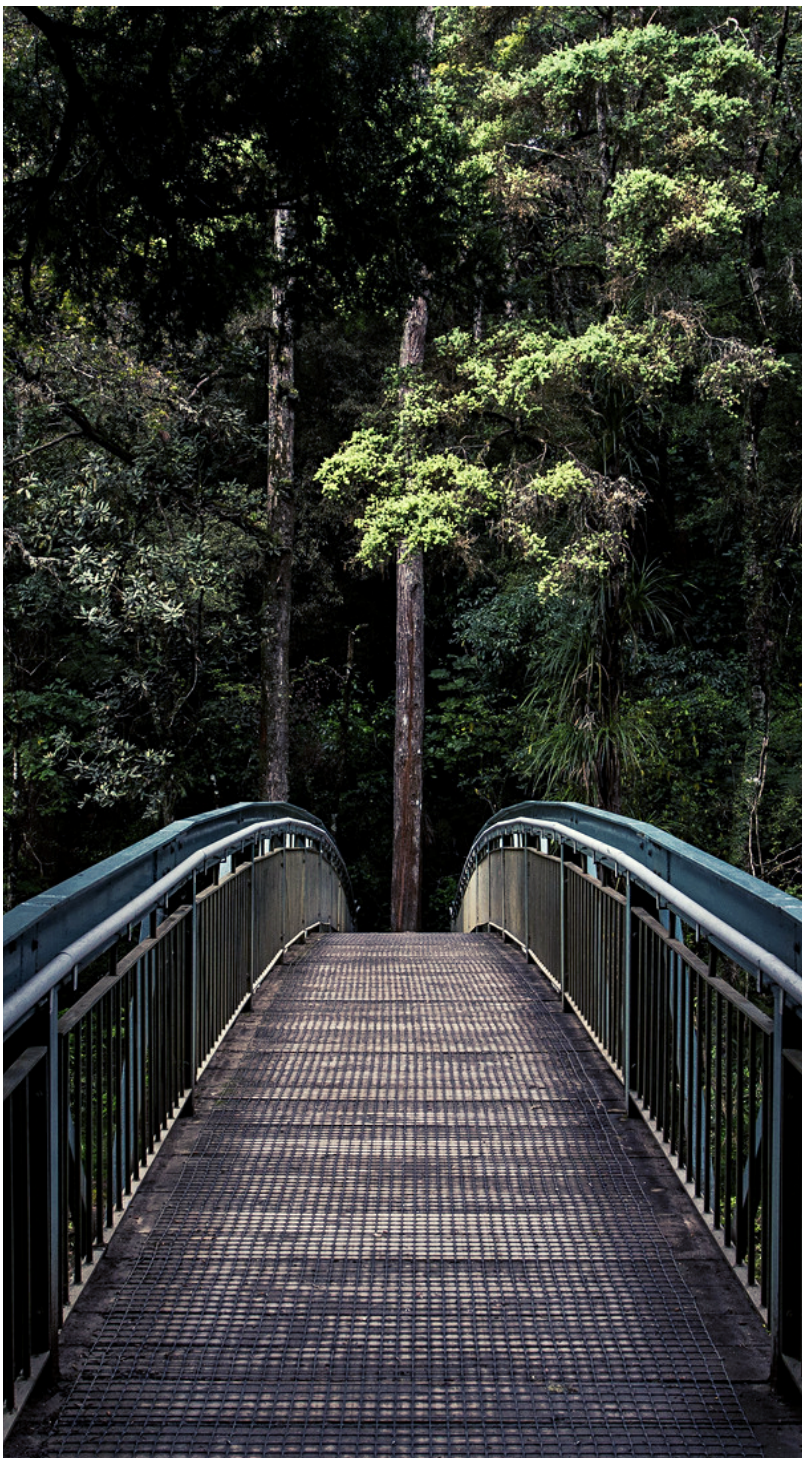
Effectively, Invoice Schemas takes the deal that you have done with your Suppliers for particular jobs and applies that as a blueprint against those jobs. Having this blueprint in place enables you to quickly and easily flag invoices that go outside of your parameters. One could also argue that Invoice Schemas are a harness that enables you and your Suppliers to charge along and complete hundreds or thousands of jobs together without hassle or fear that you have to manually double-check every single invoice for every single job completed. The Eaco System will automatically do the double-checking for you and flag invoices that don't fall within agreed terms.

Invoice Schemas set against each job can then help you control other automations, including setting the rules as to when to apply:

- Invoice Transformations that take a Supplier Invoice and automatically creates an invoice for you to send a Client.
- Service Templates that automatically create Quotes or Invoices on behalf of you or your Suppliers.

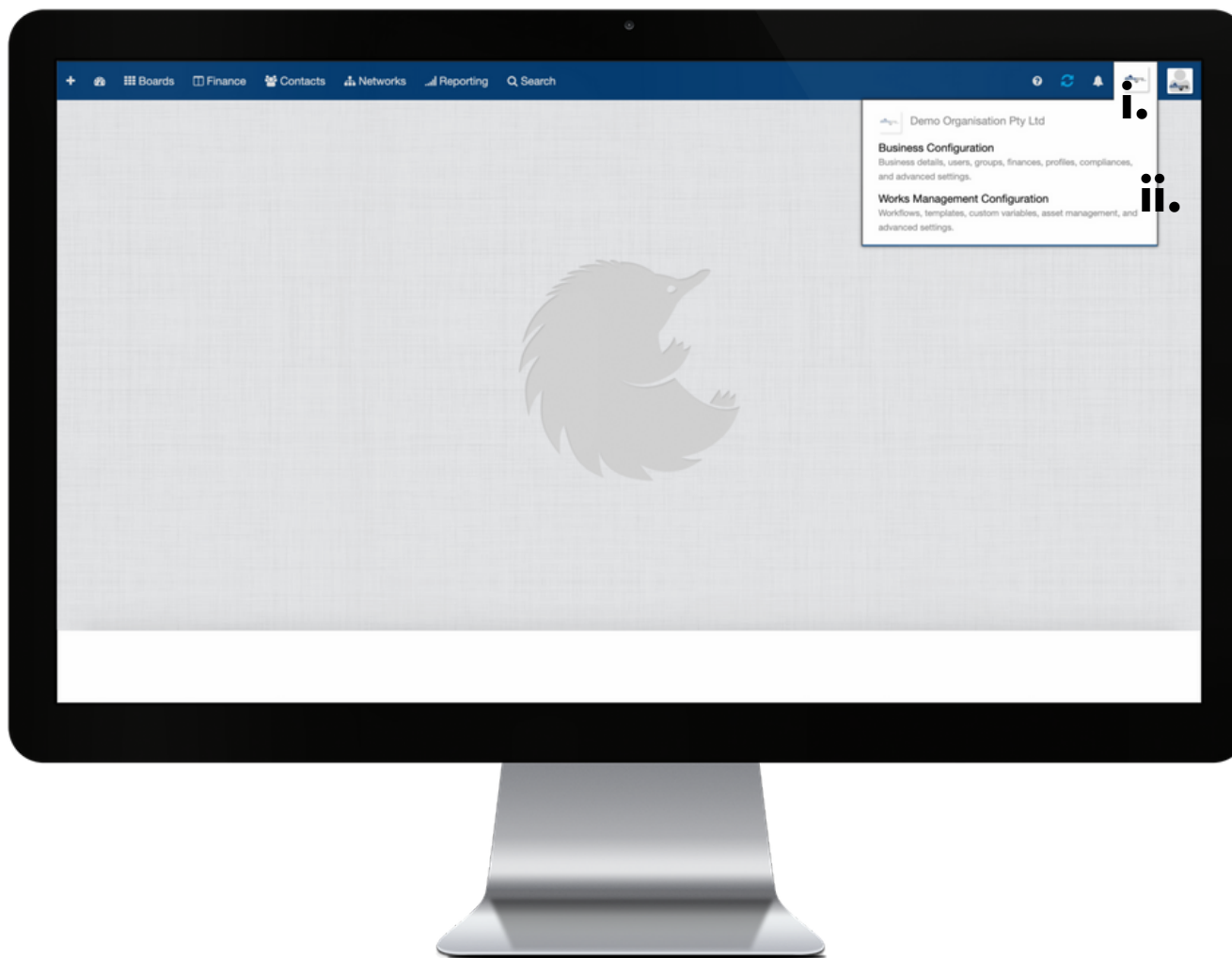
The value of what the Invoice Schemas feature can deliver to your business is deep and once you walk this bridge, you will never look back.

#goodbyepaperwork



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1. GET STARTED

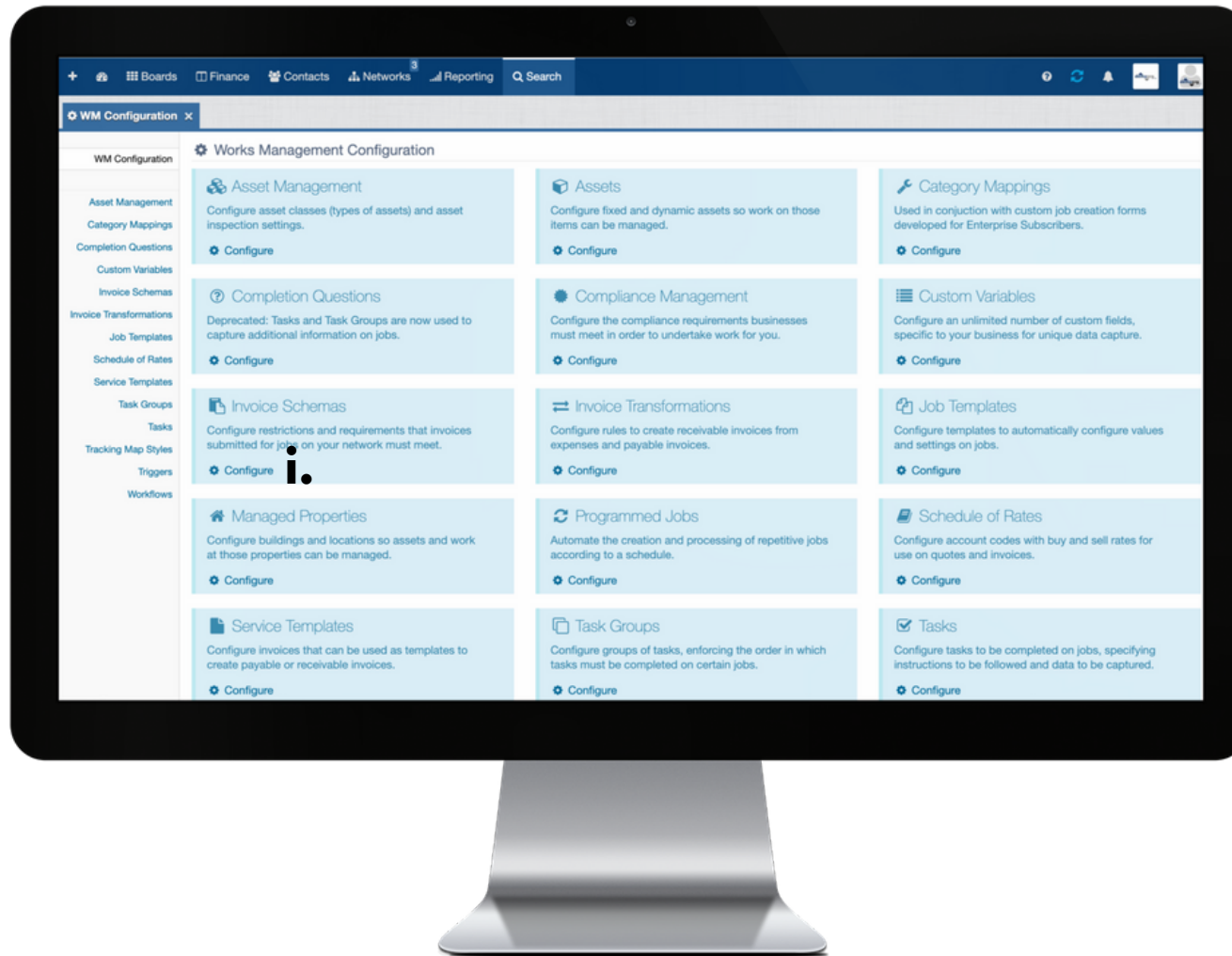


Establish the settings for your Invoice Schemas feature via your organisation's Works Management Configuration (WM Configuration) section.

Your WM Configuration section can be found by clicking on the icon (i) for your Organisation's Profile and then selecting the Works Management Configuration from within the drop down menu (ii).

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2. WM CONFIGURATION



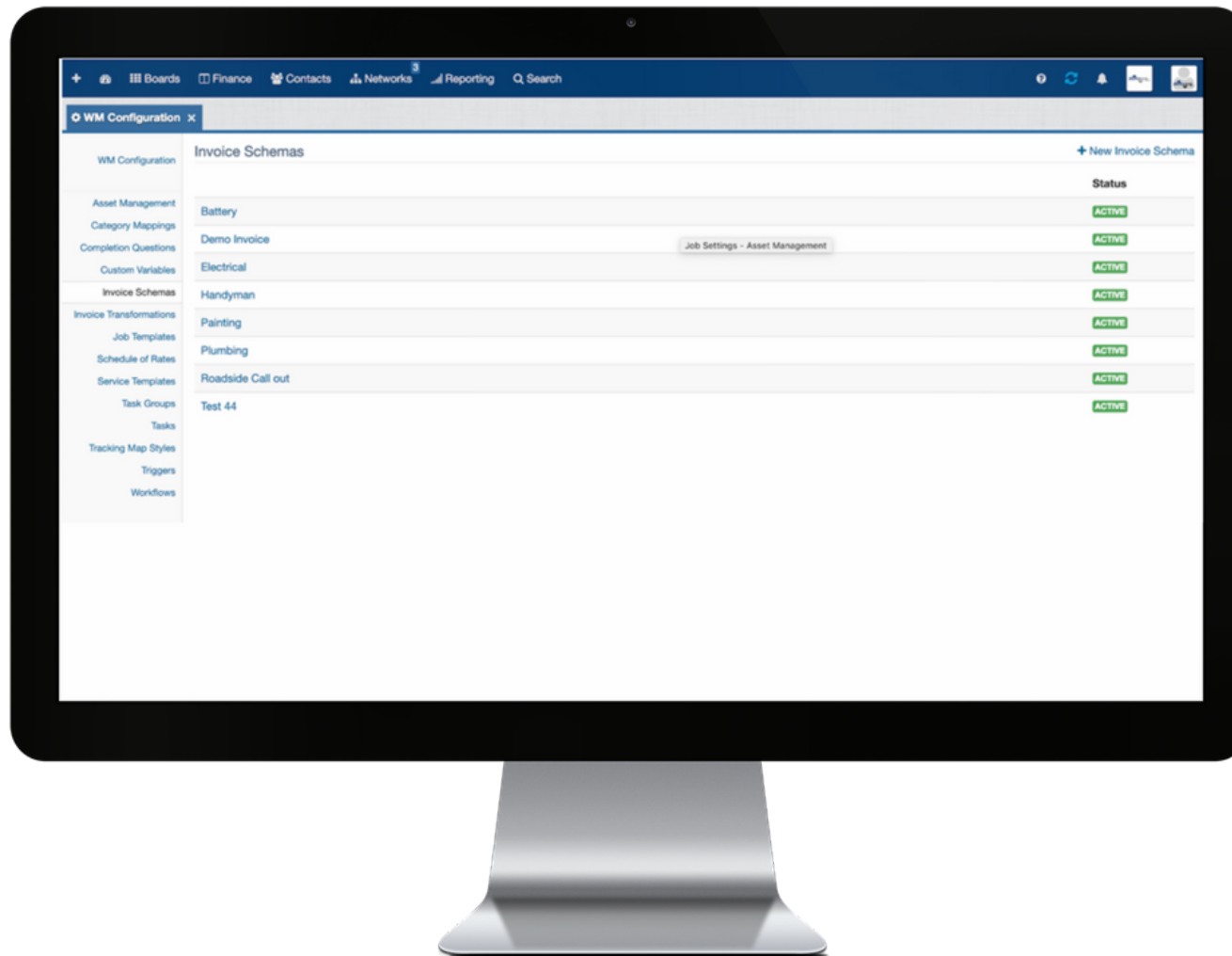
i: To commence establishing the settings for your Invoice Schemas feature, click on Configure.

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3. SETTINGS: MAIN VIEW





Configure settings to establish rules to:

Ensure that invoices issued to and/or by your business (Invoices Payable and Invoices Receivable) meet specific job parameters (e.g. maximum quantity, agreed job rate); and

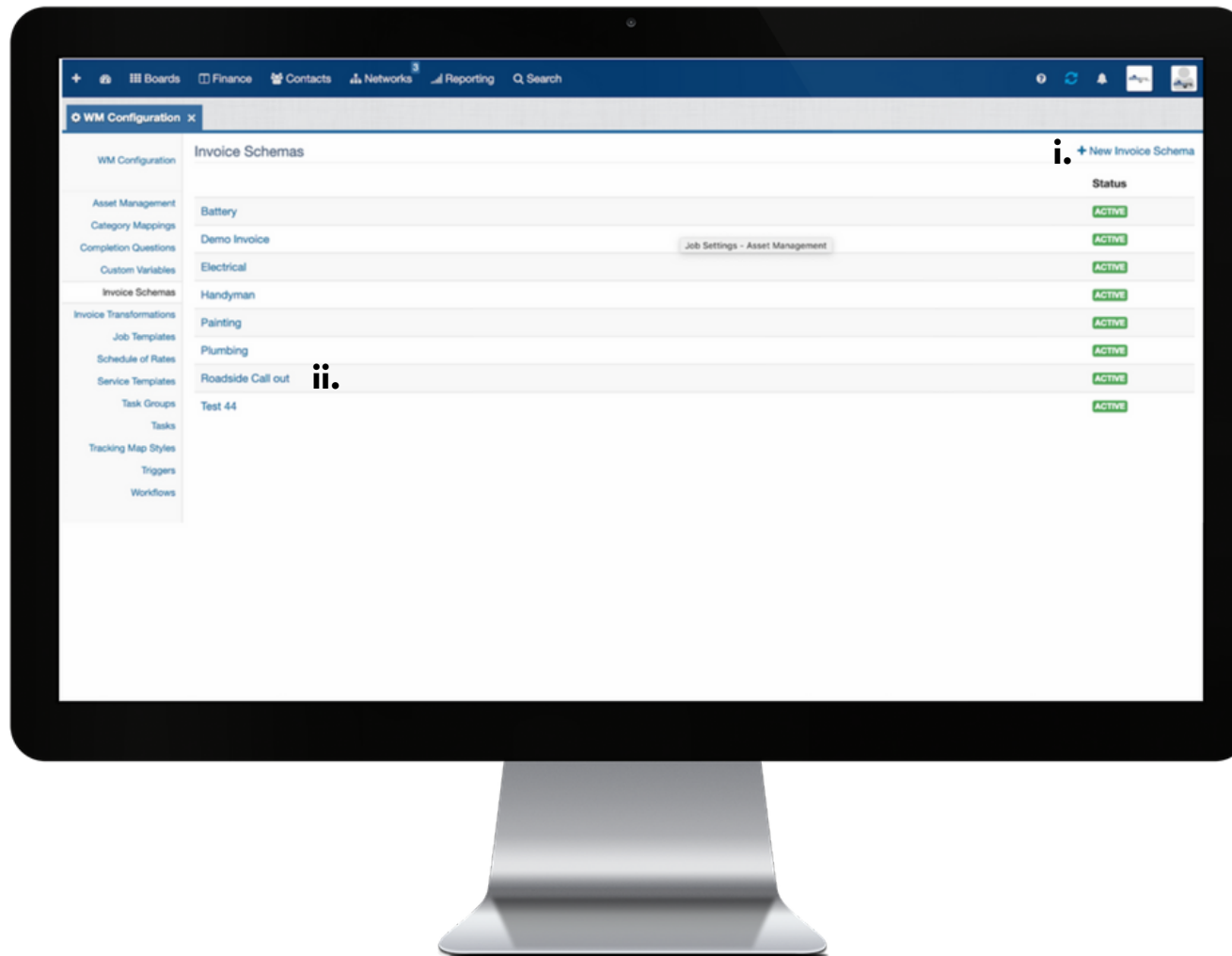
Allow payable and/or receivable invoices to be automatically generated on jobs from Service Templates.

Legend:

Status: displays the Status that can be applied to an Invoice Schema to indicate whether it is Active or Disabled.

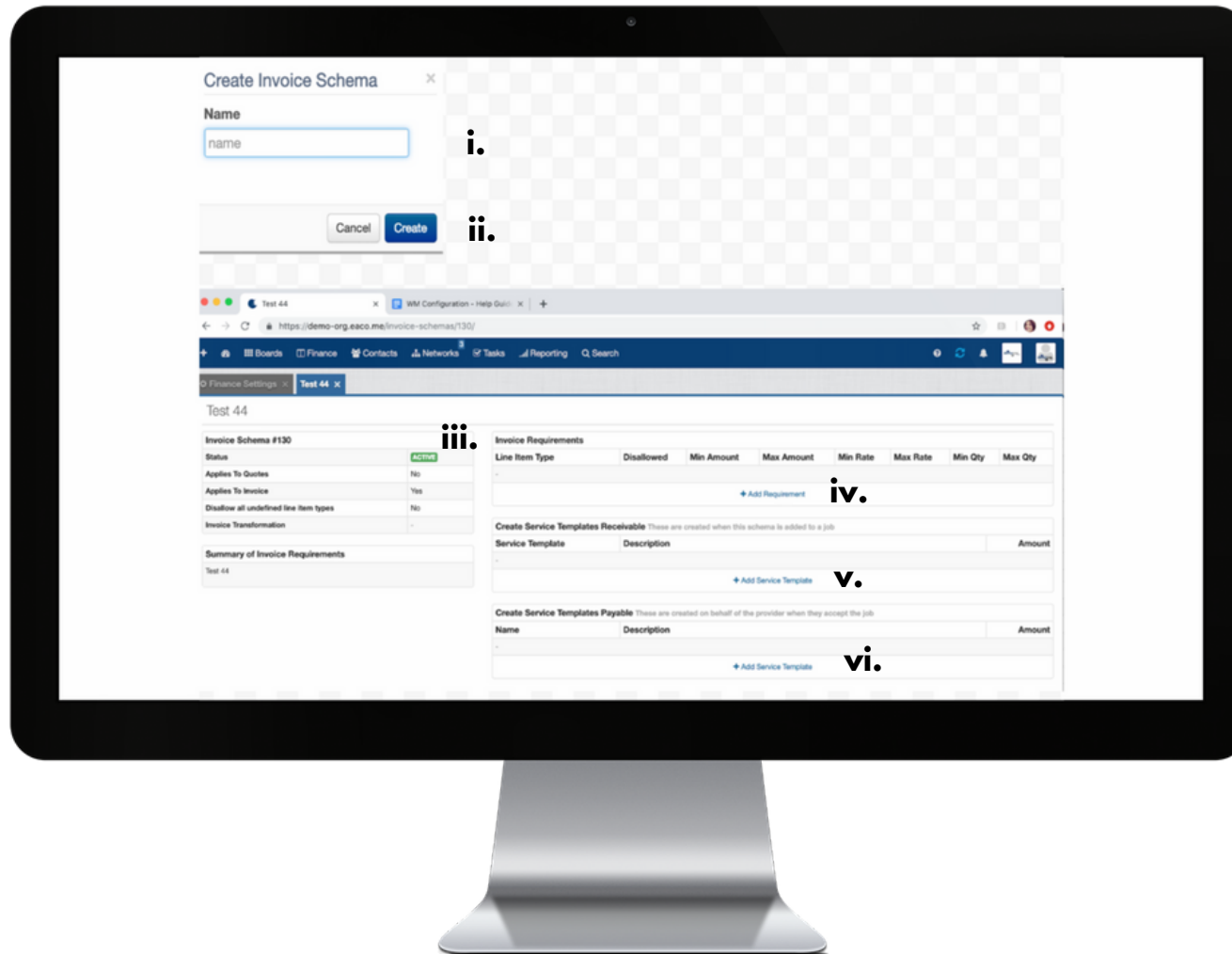
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4. ADD A NEW/EDIT AN INVOICE SCHEMA



i: click the + icon to open the New Invoice Schema dialog box; or

ii: to edit the details of an existing Invoice Schema, click the name to open the Invoice Schema dialog box.



i: enter the name of the Invoice Schema to be created.

ii: click Create to confirm.

iii: the fields in this Section are all editable - hover your mouse over to the right of the field box and click when the Edit tool icon appears.

Legend:

Status: If Active, the schema can be applied to jobs. If Disabled, the schema cannot be applied to jobs but will still be linked to jobs that it has previously been linked to.

Applies To Quotes: If Yes, the schema will be attached to any quotes created for a job the schema is applied to.

Applies To Invoices: If Yes, the schema will be attached to any invoices created for a job the schema is applied to.

Disallow all item line item types: If Yes, any line item types that don't have an Invoice Requirement specified by this schema will be disallowed from use.

Invoice Transformation: The set of Invoice Transformations that can be applied to transform quotes/invoices of this schema into an Invoice Receivable.

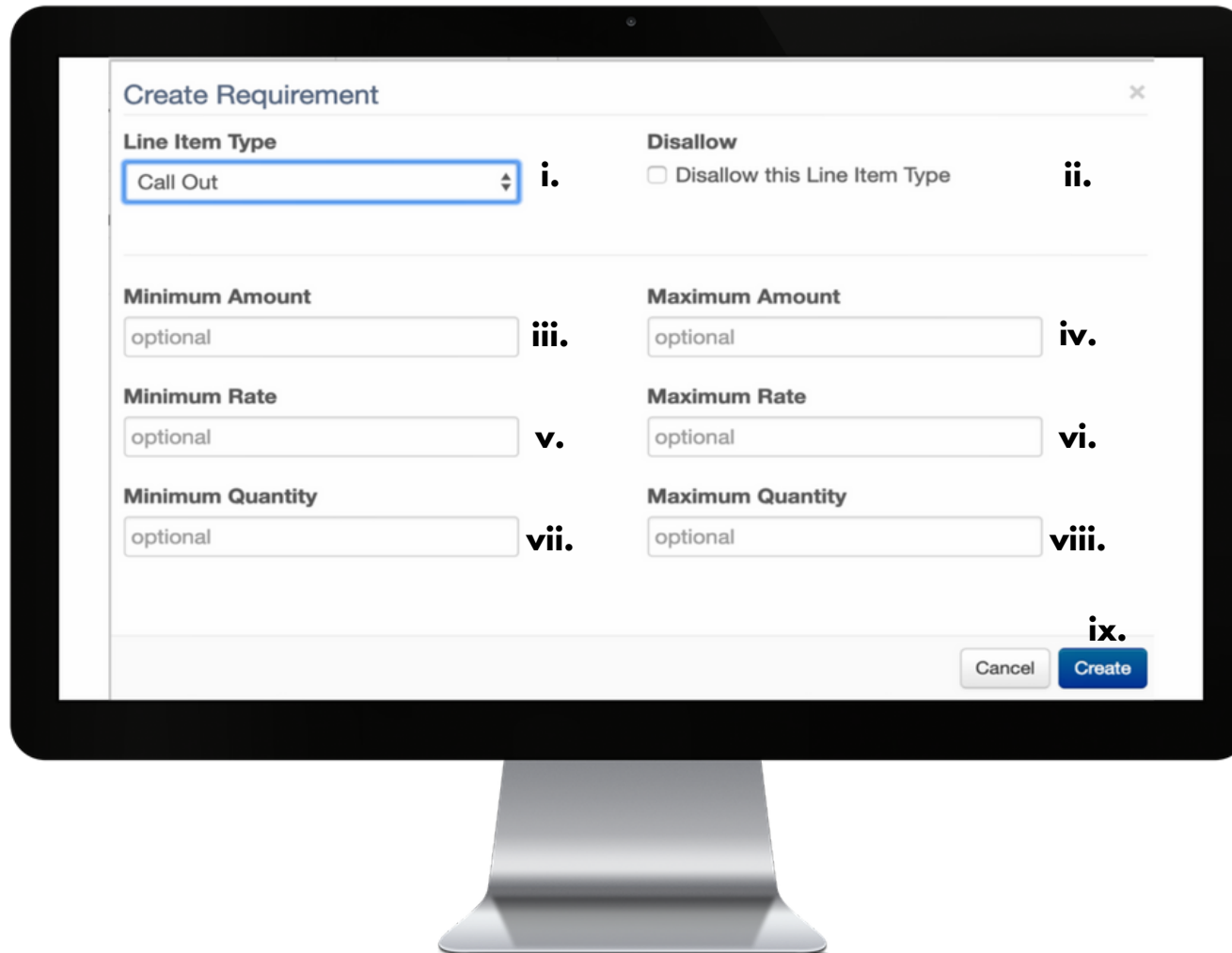
iv: click the + Add Requirement button to open the Create Invoice Requirement dialog box (see Image 03-i for further instructions).

v: click the + Add Service Template button to open the Create Service Template dialog box for Invoices Receivable (see Image 04 for further instructions).

vi: click the + Add Service Template button to open the Create Service Template dialog box for Invoices Payable (see Image 04 for further instructions).

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5. CREATE INVOICE REQUIREMENT



Create Requirement ✕

Line Item Type i.

Call Out ⌵

Disallow ii.

☐ Disallow this Line Item Type

Minimum Amount iii.

optional

Maximum Amount iv.

optional

Minimum Rate v.

optional

Maximum Rate vi.

optional

Minimum Quantity vii.

optional

Maximum Quantity viii.

optional

ix.

i: use the drop down menu to select the Line Item Type based on the service, product or job aspect that relates to the job to be quoted or invoiced.

ii: check this box to create a rule to Disallow a Line Item Type (see Image 03-ii for an example).

iii: complete this field to nominate a (\$) amount that the invoice needs to meet a Minimum Amount.

iv: complete this field to nominate a (\$) amount that the invoice needs to meet a Maximum Amount.

v: complete this field to nominate a minimum rate [e.g. the supplier's Labour Rates] needs to meet a Minimum Rate.


vi: complete this field to nominate a maximum rate [e.g. the supplier's Labour Rates] needs to meet a Maximum Rate.

vii: complete this field to nominate a minimum quantity [e.g. the supplier's Qty for Labour (i.e. hours)] needs to meet a Minimum Amount.

viii: complete this field to nominate a maximum quantity [e.g. the supplier's Qty for Labour (i.e. hours)] needs to meet a Maximum Amount.

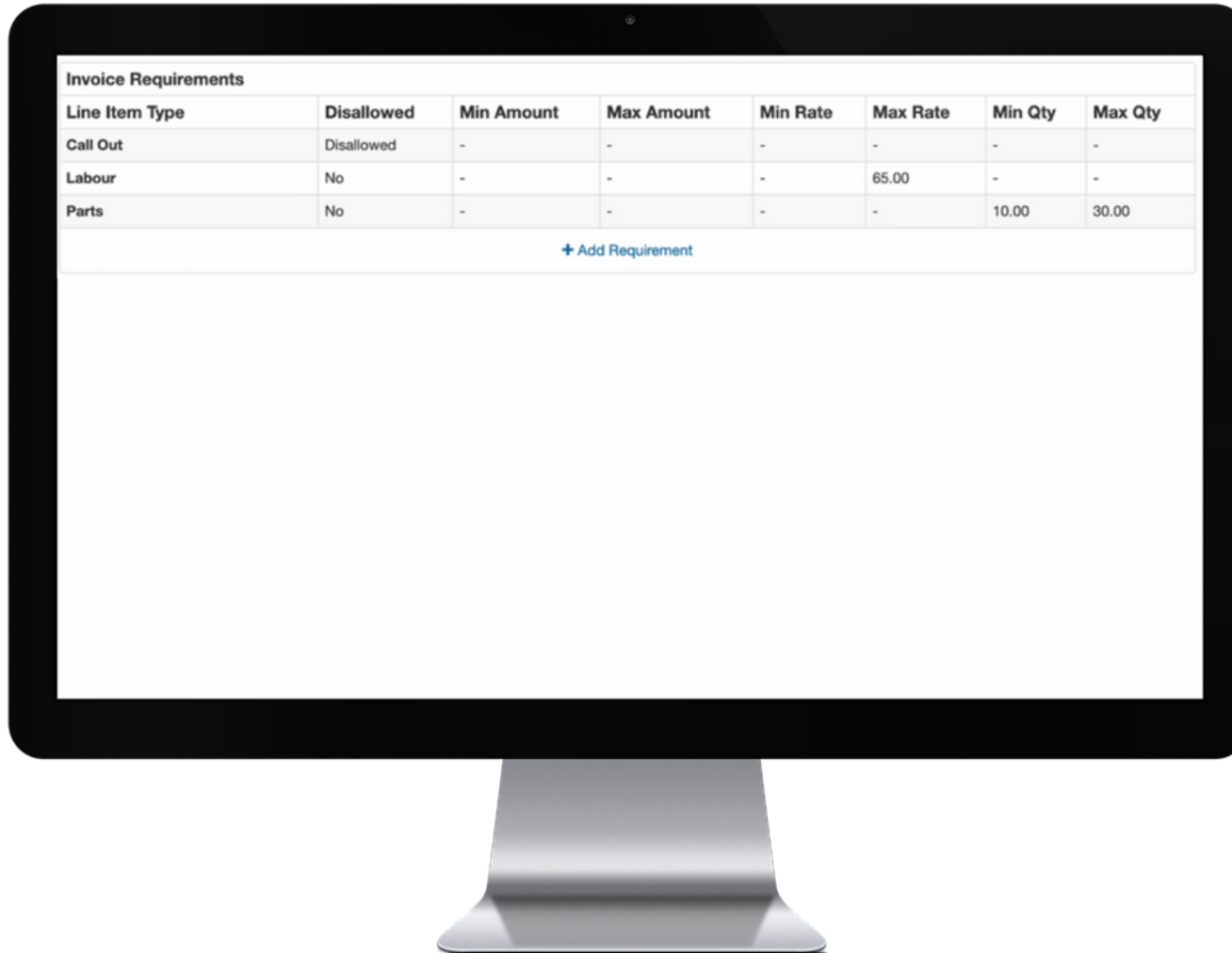
ix: click Create to save all applied settings (see Image 03-iii for screenshot of an example of a list of created Invoice Requirements).

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6. VIEW OF A CREATED LIST OF INVOICE REQUIREMENTS





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7. ADD A SERVICE TEMPLATE

Add Service Template ✕

Name

Battery

Cancel Save

Create Service Templates Receivable These are created when this schema is added to a job

Service Template	Description	Amount
Battery	Default invoice for a battery replacement job during office hours	\$77.00

+ Add Service Template

Create Service Templates Payable These are created on behalf of the provider when they accept the job

Name	Description	Amount
Battery	Default invoice for a battery replacement job during office hours	\$77.00

+ Add Service Template

i: use the drop down menu to select the Service Template to be applied to the Invoice Requirements.

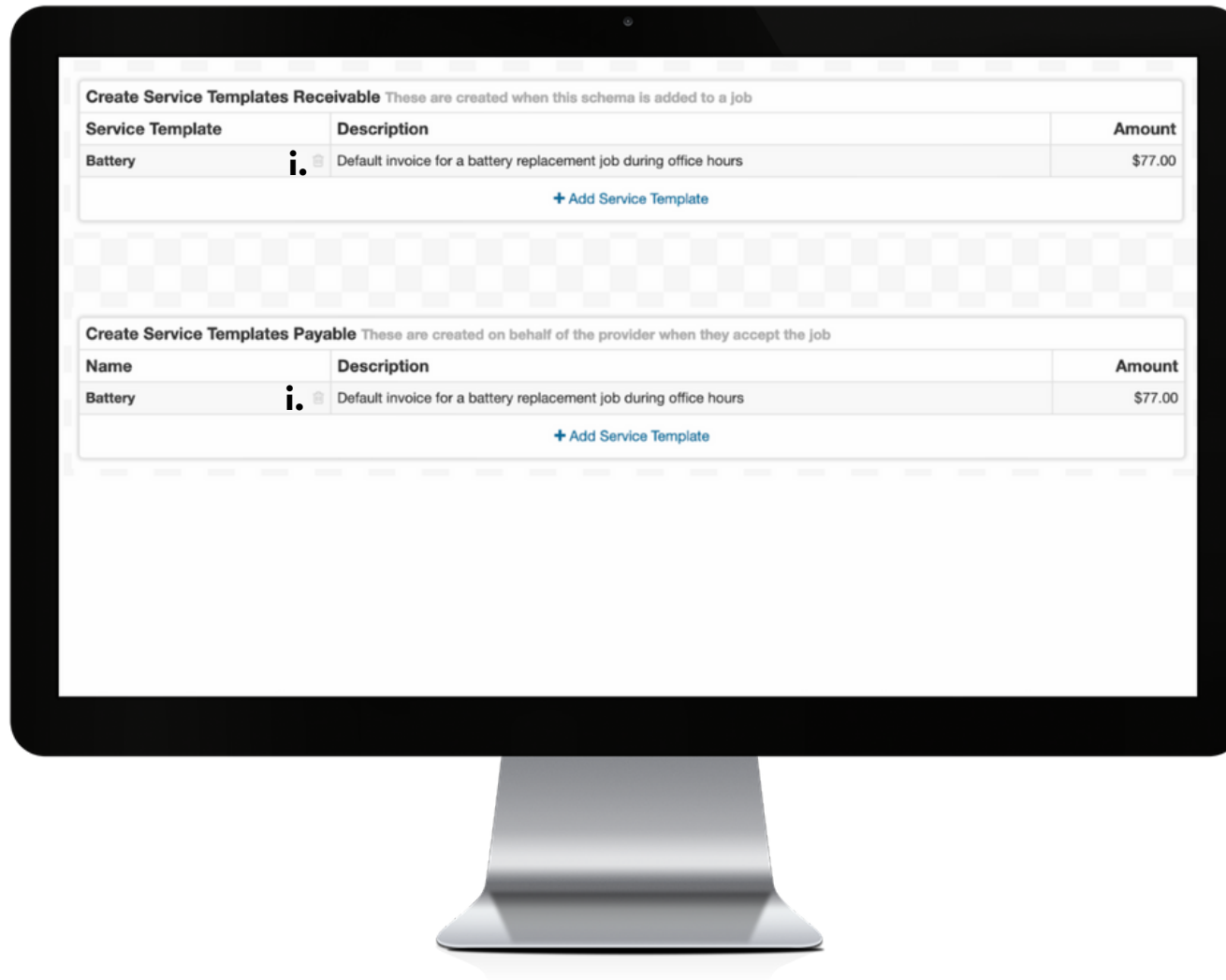
ii: click Save to confirm.

iii: details of a Service Template for Invoice Receivables that has been applied will appear listed in the table.

iv: details of a Service Template for Invoice Payable that has been applied will appear listed in the table.

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8. DELETE A SERVICE TEMPLATE



i: to delete a Service Template, hover your mouse over to the right of the Service Template name field box and click the “bin” icon when it appears.