



Eaco Invoice Transformations

USER GUIDE

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INTRODUCTION

“Don’t spend time beating on a wall, hoping to transform it into a door.” - Coco Chanel

We all love being paid but we all hate doing the paperwork required to get paid.

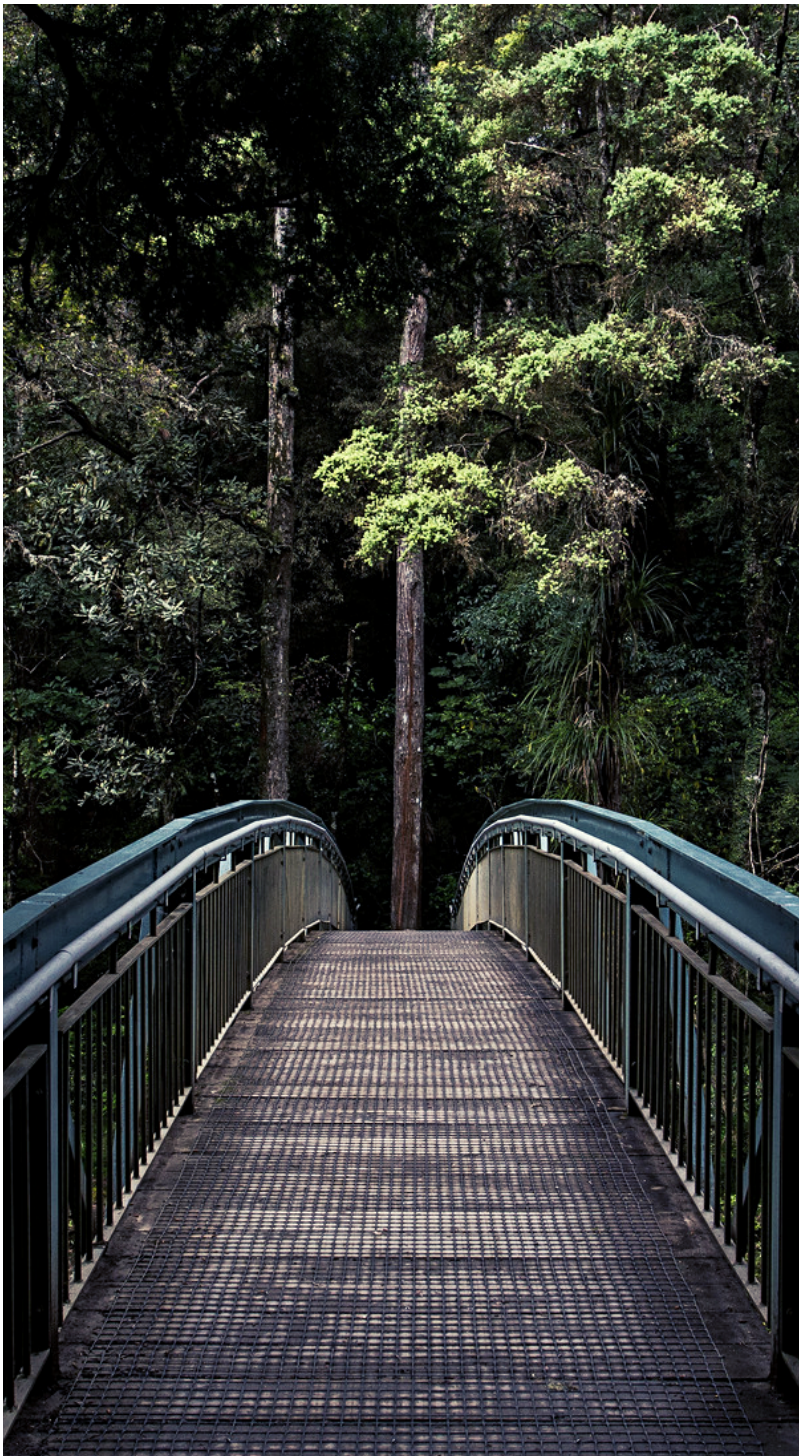
How good would it be if that paperwork simply took care of itself? How good would it be, if the minute you received an invoice from a Supplier, it automatically transforms into an invoice from your business and sent to your client? Sounds like magic, right? Well...that’s exactly what Eaco’s Invoice Transformations feature does - it takes the manual invoicing process and makes it effortlessly and automatically digital, ultimately bridging the gap between work performed and the need to be paid quickly.

Eaco’s Invoice Transformation feature enables you to set your own business rules in relation to how you would like to charge your clients for work that is undertaken by your subcontractors. For example, you may wish to apply your margin by simply adding a flat 20% on top of your subcontractor’s invoice. Alternatively, you may add a set dollar fee for each Job undertaken or you could create a hybrid approach that combines these two options. Eaco provides you with the flexibility to choose.

One of the most useful benefits of Invoice Transformations is that it minimises the risk of your business missing out on revenue that is rightfully yours. This is achieved via the automated connection between an invoice from a supplier and an invoice that sent to your client, which instils confidence that clients are always invoiced for the work that you manage for them.

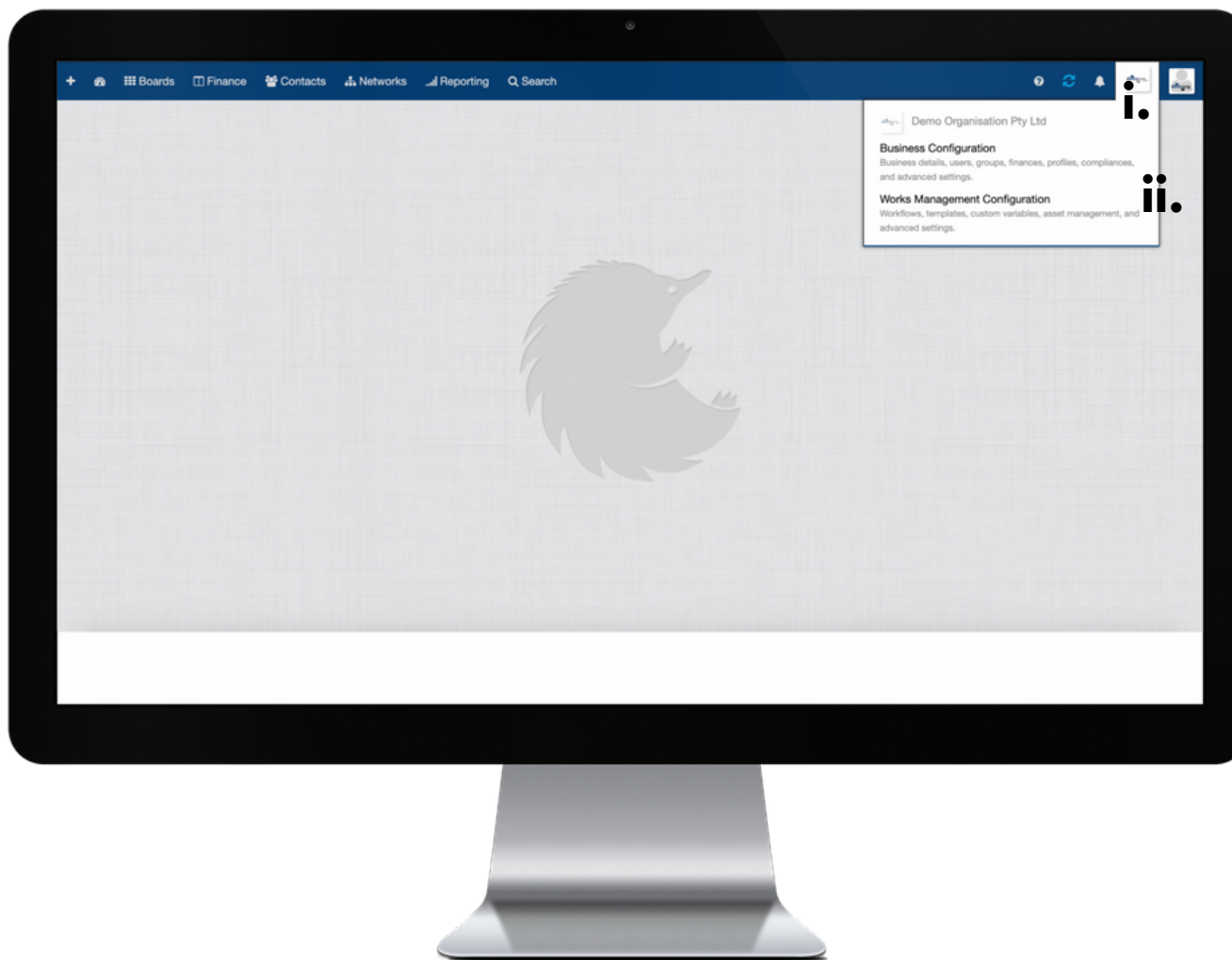
There is nothing more expensive than finding out that you’ve paid a supplier and forgotten to invoice your client. So get on board and enjoy the value Eaco’s Invoice Transformations feature can add to your business.

#transformingpayment



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COMMUNICATE AND
OPTIMISE

1. GET STARTED

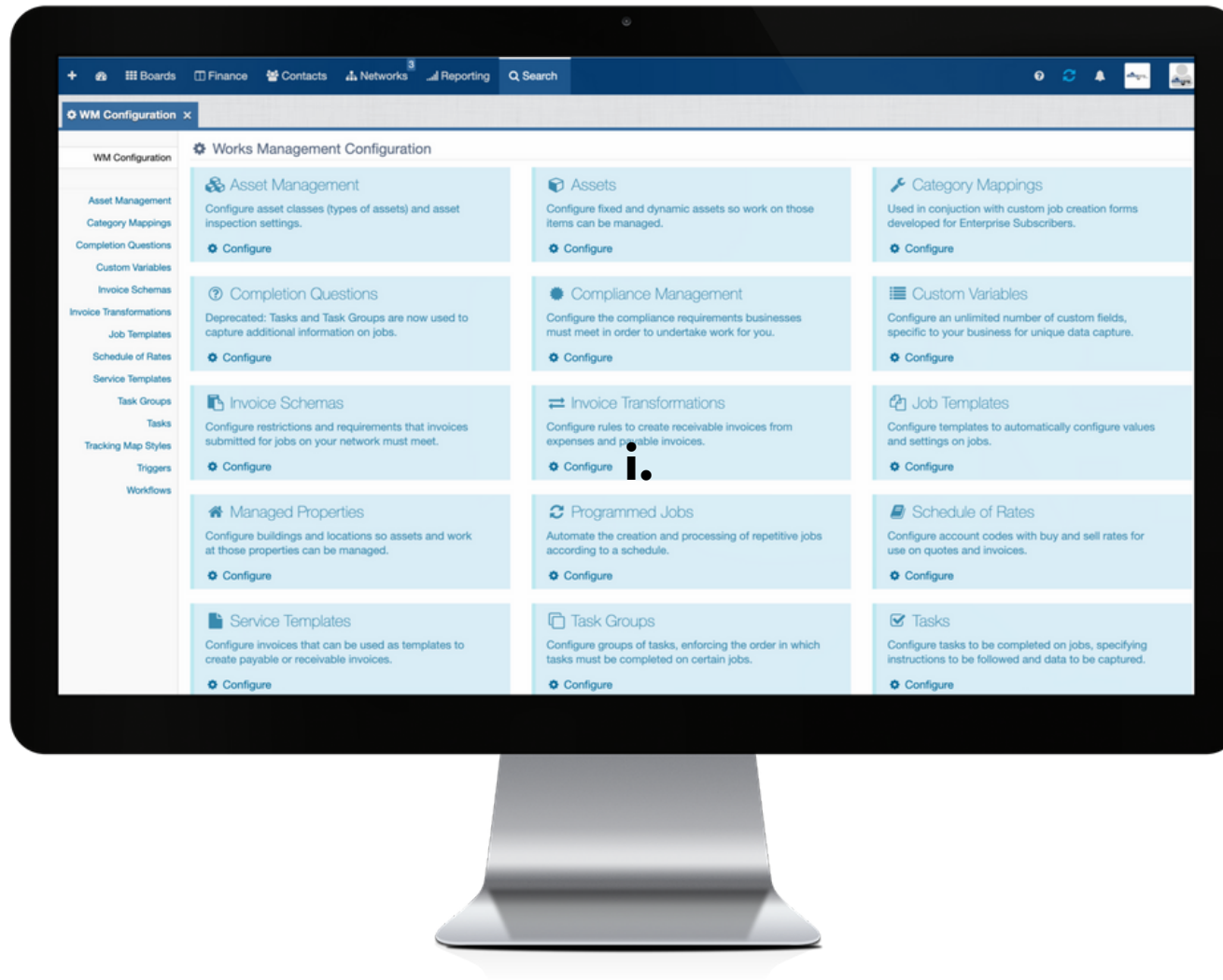


Establish the settings for your Invoice Transformations feature via your organisation's Works Management Configuration (WM Configuration) section.

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



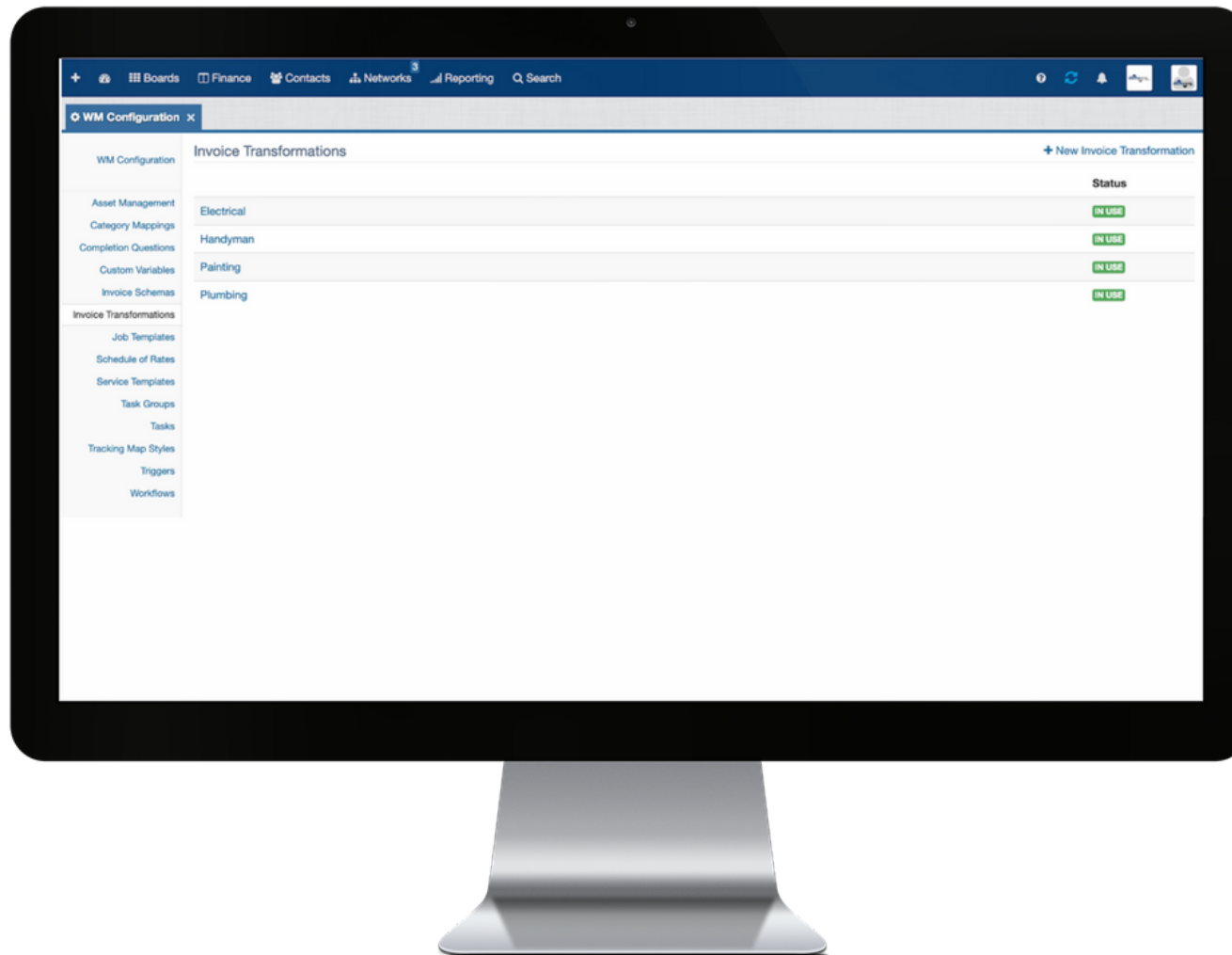
i: To commence establishing the settings for your Invoice Transformations feature, click on Configure.

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3. SETTINGS: MAIN VIEW





Configure settings to establish the automatic creation of quotes and/or Invoices Receivable based on transforming job payment parameters as specified in an Invoice Schema with optional % markup.

Legend:

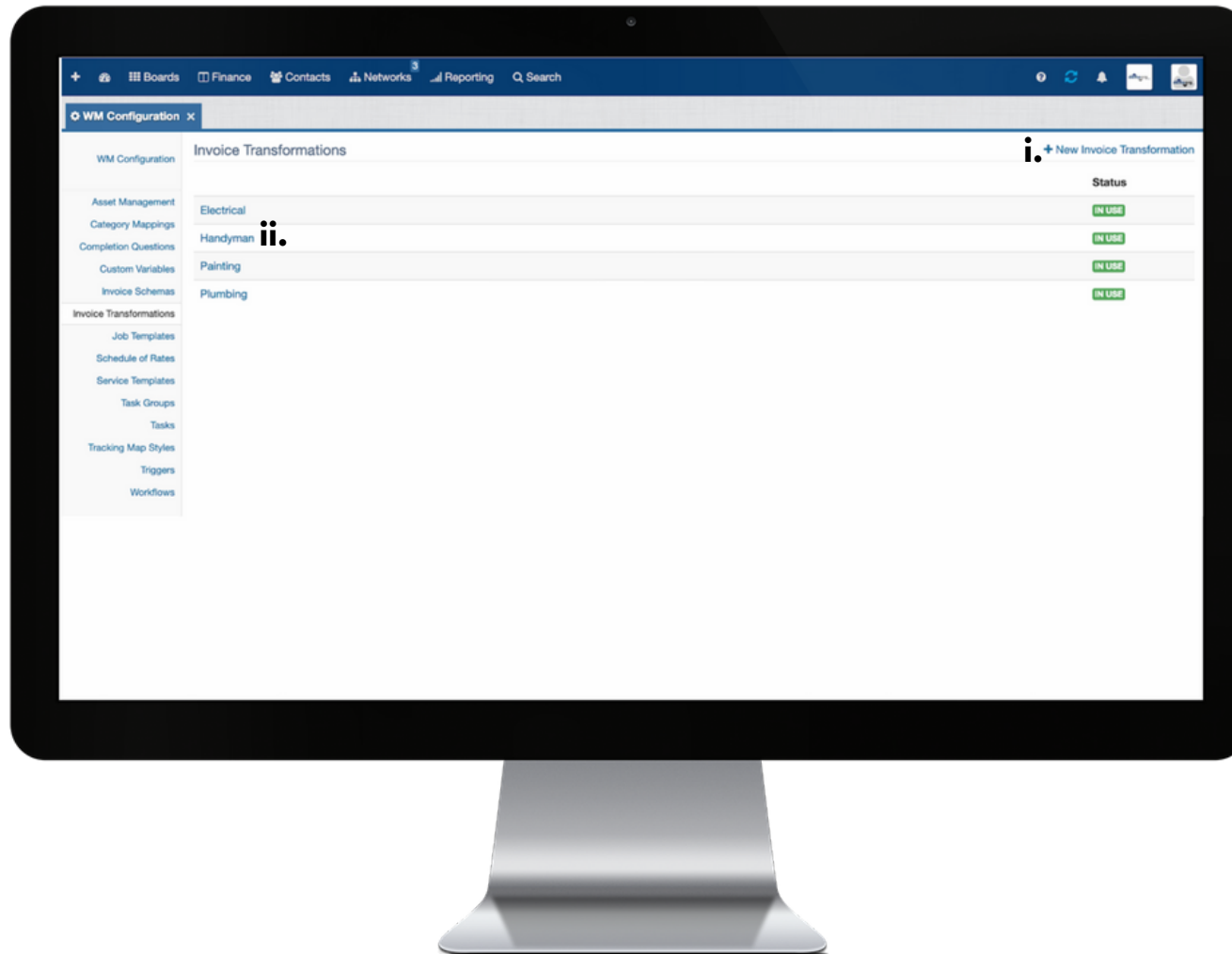
Status: indicates whether an Invoice Transformation is In Use on an Invoice Schema (i.e. the Invoice Transformation has been attached for use on an Invoice Schema). The Status will indicate Not In Use if an Invoice Transformation has not been attached for use on an Invoice Schema.

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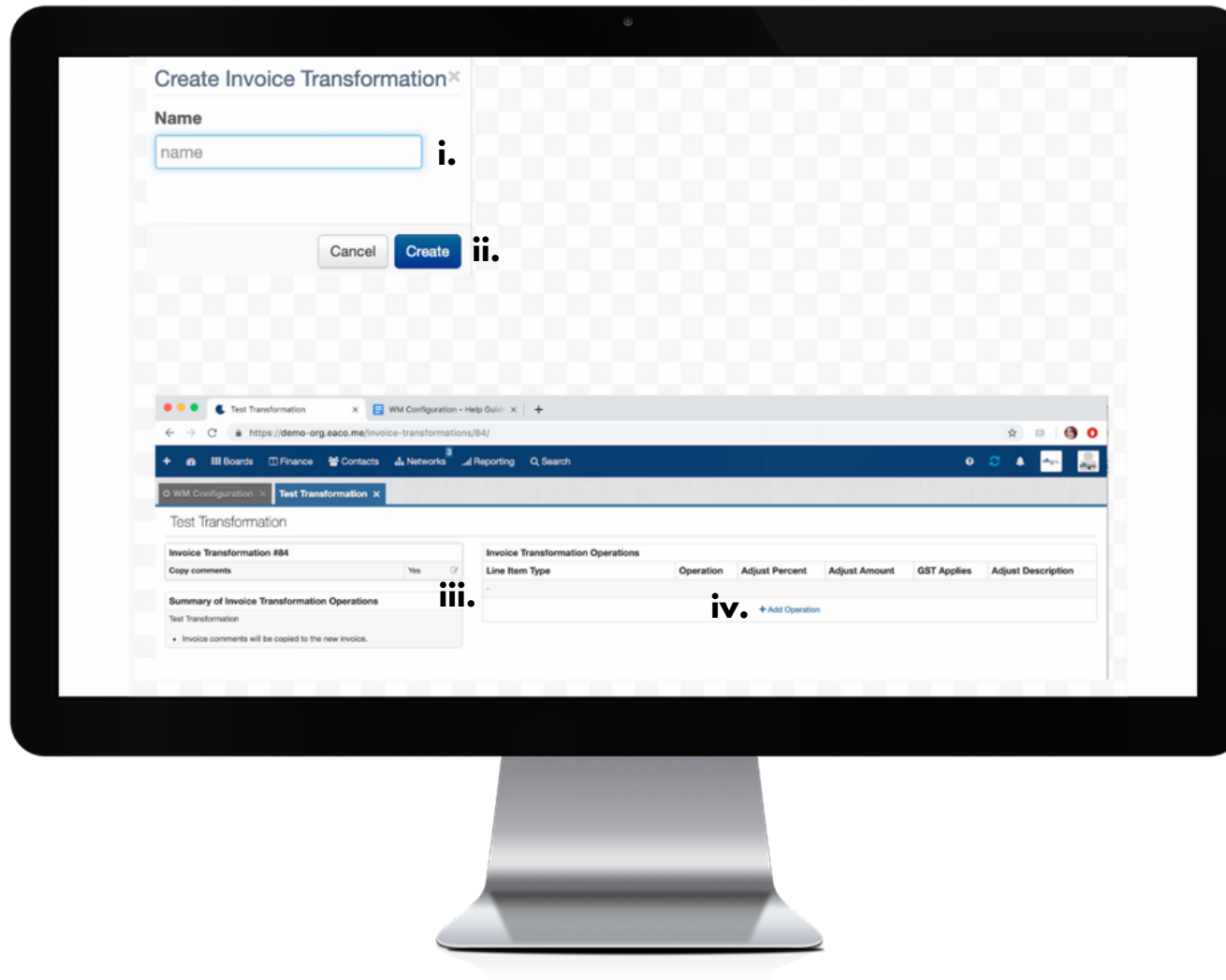
4. ADD A NEW/EDIT AN INVOICE TRANSFORMATION





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

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



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

ii: click Create to confirm.

iii: select Yes if comments from the original invoice are to be copied over to the new Invoice Receivable or No if comments are not to be copied over - hover your mouse over to the right of the field box and click the Edit tool icon when it appears then select Yes or No.

iv: click the + Add Operation button to open the Create Operation dialog box.

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5. CREATE OPERATION

Create Operation ×

Line Item Type	Operation
i. Call Out	ii. Transform

Adjust Percentage	Adjust Amount (ex. GST)
iii. optional	iv. optional

GST

v. ☐ GST applies to this line item

Adjust Description

vi. optional

Cancel Create vii.

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 invoiced.

ii: use the drop down box to select the action (Operation) that is to be applied to the Invoice Receivable to be created.

Legend:

Transform: select this option to copy the line item over to adjust the Invoice Receivable to be created.

Add new: adds a new line item to the Invoice Receivable.

Remove: removes line items of this type from the Invoice Receivable.

iii: complete this field to increase or decrease the amount by a specified percentage*.

iv: complete this field to set the per unit amount*.

v: check or uncheck this box to indicate whether or not GST is to apply to the line item (Note: this is not whether or not the entered amount/percentage includes or excludes GST (they are ex. GST), it's whether or not GST is to apply to the line item).

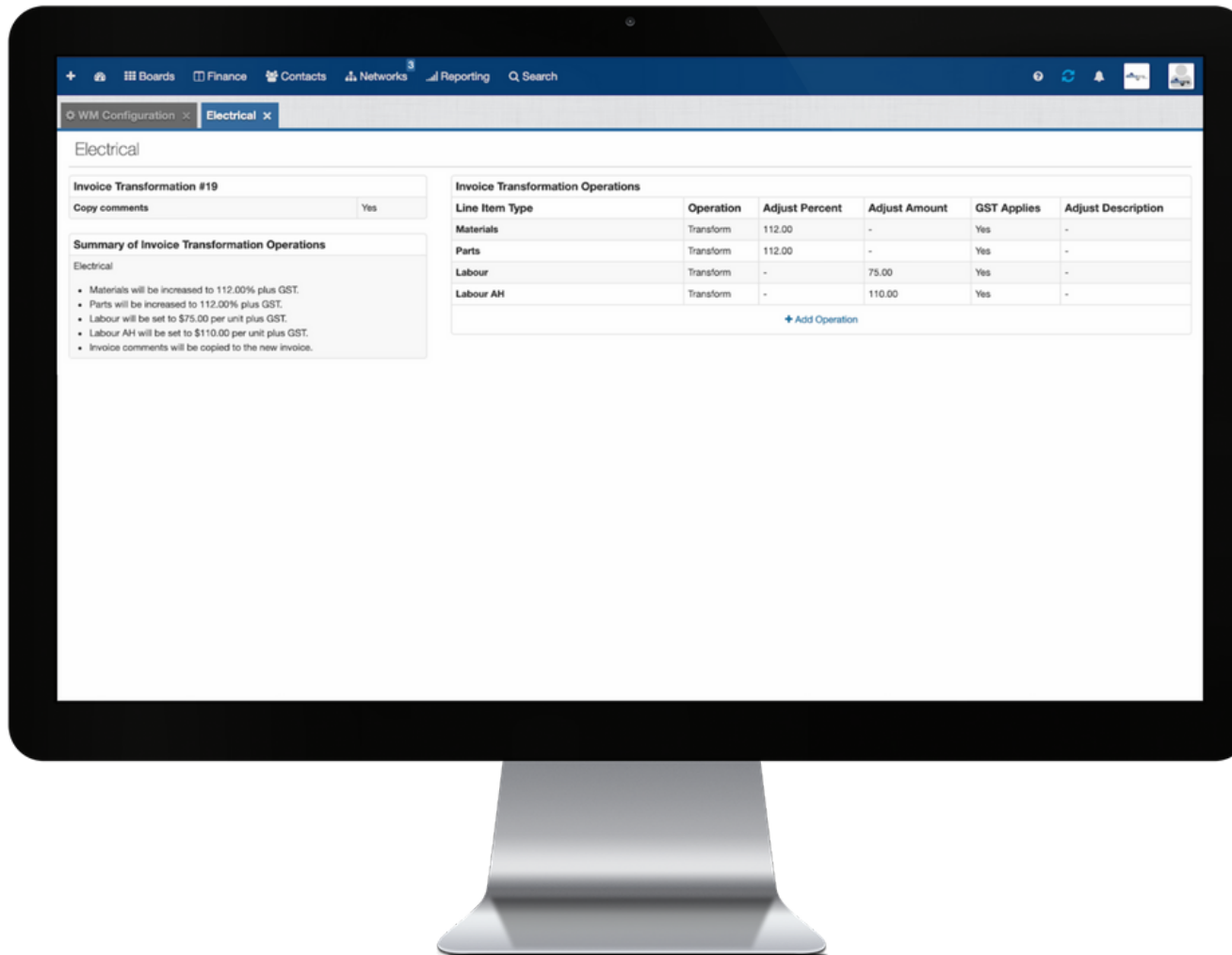
vi: complete this field to enter a description for the line item.

vii: click Create to confirm.

*If a percentage adjustment as well as an amount adjustment is applied in a transform operation, the amount will be adjusted first by the percentage, then adjusted by the specified amount.

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6. EXAMPLE OF A COMPLETED INVOICE TRANSFORMATION SETUP

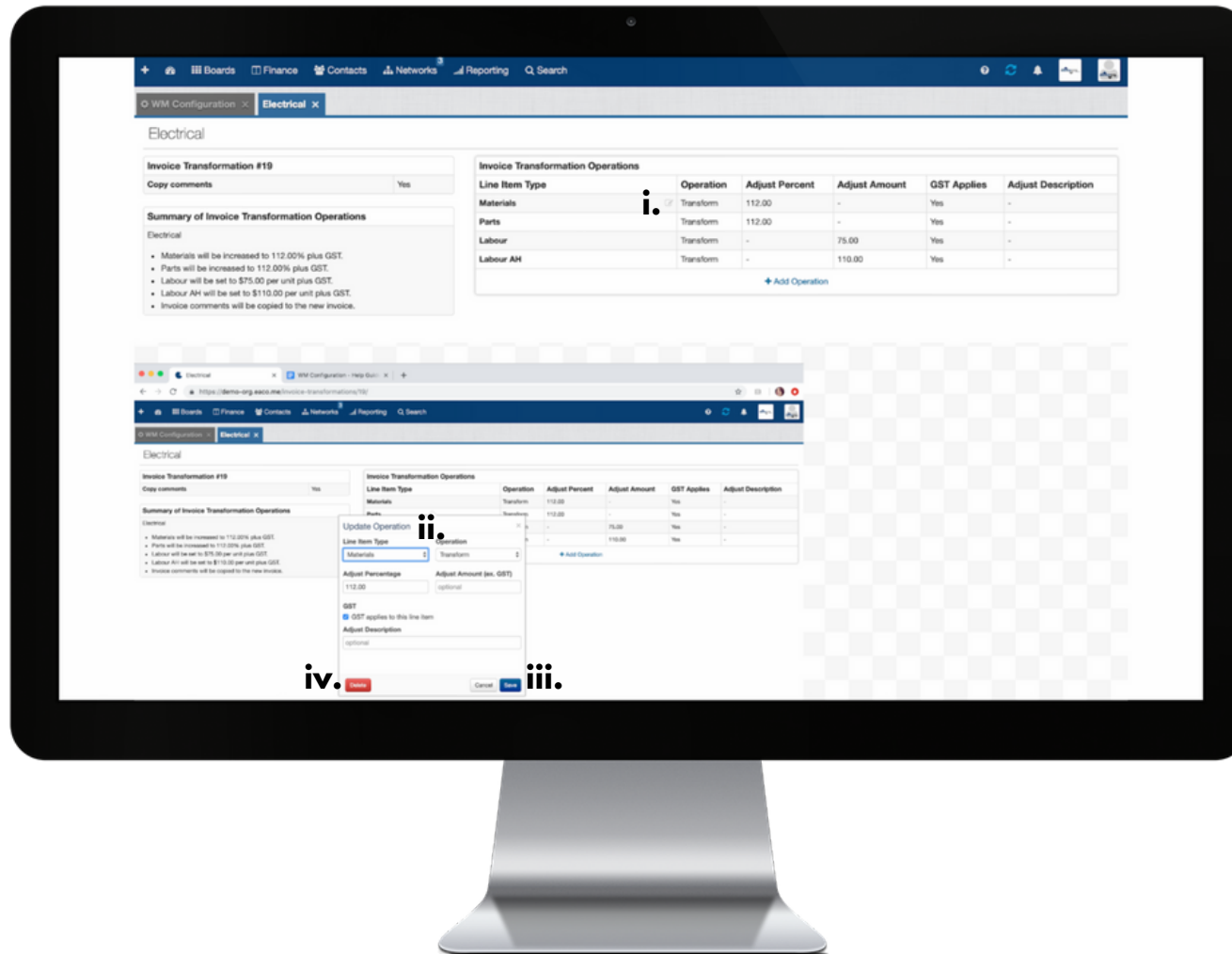


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7. EDITING/DELETING A COMPLETED INVOICE TRANSFORMATION SETUP





i: the fields in Line Item Type column are all editable - hover your mouse over to the right of the field box and click when the Edit tool icon appears. Upon clicking the Edit tool, the Update Operation dialog box will present.

ii: to edit the Invoice Transformation settings, update the fields in the Update Operation dialog box as necessary.

iii: Click Save to confirm changes; or

iv: to Delete the Invoice Transformation settings, click the Delete button.