

How Import Billable from Help Desk work

1. Add an Item with **Item Type** set to **Service**. See also [How to Add Item - Service Type](#).
2. Associate above item to a **billable Job Code**. See also [How to Add Ticket Job Codes](#).

| Job Code | Description | Billable | Rate | Linked Item | Supported |
|-----------------------------------|--------------------|-------------------------------------|-------|--------------|-------------------------------------|
| <input type="checkbox"/> AHE - hr | After Hours - hour | <input checked="" type="checkbox"/> | 35.00 | Installation | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | | <input type="checkbox"/> | 0.00 | | <input type="checkbox"/> |

3. Create a ticket for the customer and add an **Hours Worked**. On the **Job Code** field, select a code that is billable and is linked to an item. The **Rate** will default to the price configured on the inventory item at the time the job gets created. See also [How to Create Tickets](#).

| Agent | Hours | Date | Job Code | Billable | Rate | Description |
|---|-------|-----------|----------|-------------------------------------|-------|-------------|
| <input checked="" type="checkbox"/> IRELY ADMIN | 8.00 | 6/29/2016 | AHE - hr | <input checked="" type="checkbox"/> | 35.00 | |

4. Open the **Import Billable from Help Desk** screen, **Sales | Import Billable from Help Desk** menu. The screen will display all the billable hours from Help Desk.
5. Select the row/s to be imported then click the **Import** button. You have two import options,
 - a. **Import Only** - this will import the billable hours and generate an Invoice. Invoice is not posted.
 - b. **Import and Post** - this will import the billable hours, generate an Invoice, and Post the Invoice.

| Customer No. | Customer Name | Ticket Number | Agent | Date | Job Code | Hours | Price | Total |
|--|---------------|---------------|--------------|-----------|----------|-------|-------|--------|
| <input type="checkbox"/> 0001005109 | no terms | HDTN-10 | ARman Arenas | 6/7/2016 | AHE - hr | 1.00 | 35.00 | 35.00 |
| <input checked="" type="checkbox"/> 0001005095 | ABC Reseller | HDTN-16 | IRELY ADMIN | 6/29/2016 | AHE - hr | 8.00 | 35.00 | 280.00 |

If you chose the 'Import and Post' button, it will show the Batch Posting Details once done importing. This screen will show the importing status per record. Close this screen.

| Record No | Description |
|---------------------------------|----------------------------------|
| <input type="checkbox"/> SI-444 | Transaction successfully posted. |

Posted = 1 Failed = 0

Ready

6. This message will be displayed. Click the **OK** button. All imported records will be removed in the Import Billable from Help Desk grid.



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Billable Hours Import Completed!



7. Open the Invoice search grid, **Sales | Invoices** menu. The imported record will be displayed on the upper row of the search grid.

If there are multiple imported billable hours, the system will group it by customer and location. Thus, tickets from the same Customer and having the same Location will be grouped in a single Invoice.

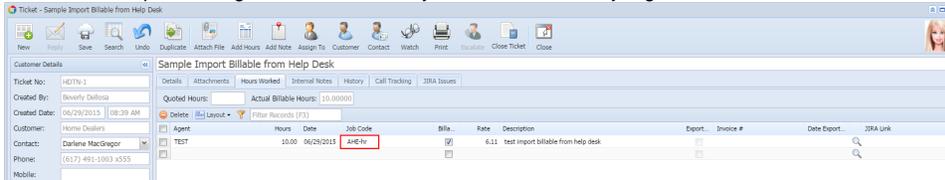
8. Open the Invoice record and verify the details.

The screenshot shows an 'Invoice - ABC Reseller' window. The top section contains various fields for Source, Type, Customer, Invoice Date, Post Date, Location, Bill To, Ship To, Ship Date, Ship Via, Terms, PO Number, Invoice No., Freight Term, Deliver/Pickup, Salesperson, Account, Currency, and Accrual. Below this is a table with columns: Item No., Contract No., Sequence, Description, Ordered, Order UOM, Shipped, UOM, Discount %, Tax, Sub Cur, Price, Total, Tax Group, and Weight UOM. The table contains one row for 'Installation' with a price of 35.000000 and a total of 280.00. At the bottom right, a summary section shows Subtotal: 280.00, Shipping: 0.00, Tax: 25.20, Total: 305.20, Amount Received: 0.00, and Amount Due: 305.20.

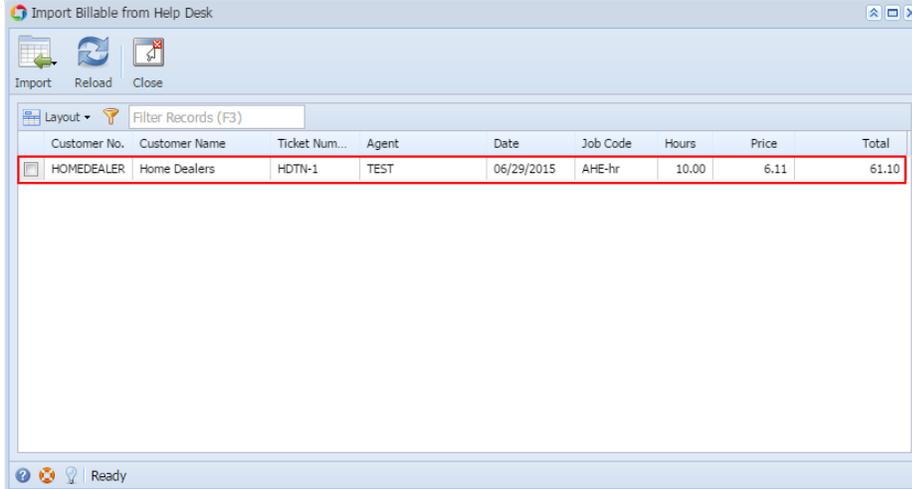
1. Add an Item with **Item Type** set to **Service**. See also [How to Add Item - Service Type](#).
2. Associate above item to a **billable Job Code**. See also [How to Add Ticket Job Codes](#).

The screenshot shows a 'Ticket Job Codes' window. It has a toolbar with Save, Undo, and Close buttons. Below is a table with columns: Job Code, Description, Billable, Rate, Linked Item, and Supported. The table contains two rows. The first row has Job Code 'AHE-hr', Description 'After Hours-hour', Billable checked (checkbox with checkmark), Rate '150.00', Linked Item 'Installation', and Supported checked. The second row has Job Code blank, Description blank, Billable unchecked, Rate '0.00', Linked Item blank, and Supported unchecked. The 'Billable' and 'Installation' cells in the first row are highlighted with red boxes.

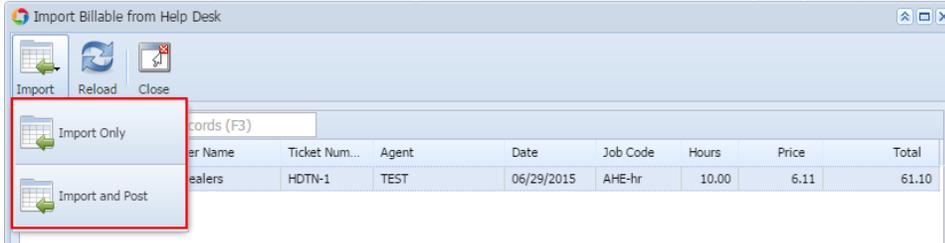
3. Create a ticket for a customer, then add an **Hours Worked**. On the Job Code field, select a code that is billable and is liked to an item. The **Rate** will default to the price configured on the inventory item at the time the job gets created. See also [How to Create Tickets](#)



4. On **Sales folder**, click the **Import Billable from Help Desk** menu. The screen will display all the billable hours from Help Desk.

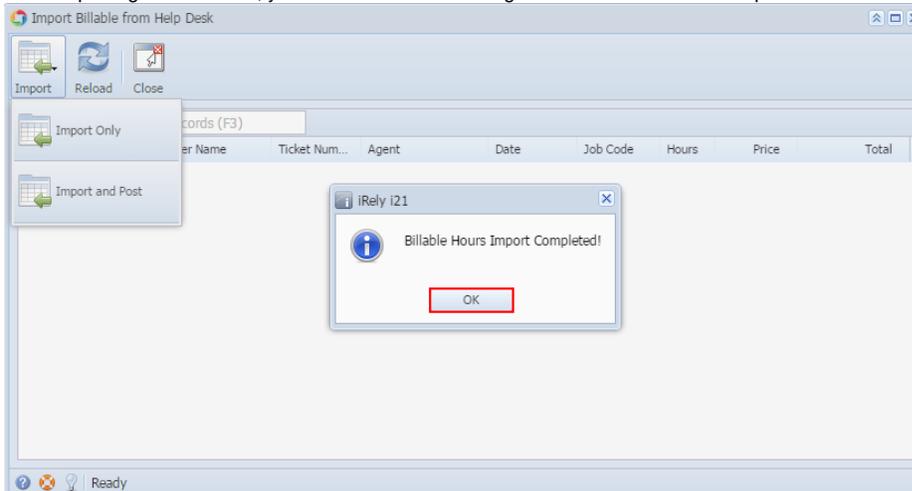


5. Select the row to be imported then click the **Import toolbar button**. You have two import options,



- a. **Import Only** - this will import the billable hours and generate an Invoice. Invoice is not posted.
- b. **Import and Post** - this will import the billable hours, generate an Invoice, and Post the Invoice.

6. Once importing is successful, you will receive this message. Click **OK button**. The imported billable hours should be removed in the grid.



7. On **Sales folder**, click the **Invoice** menu. The imported record will be displayed on the upper row of the search grid.



8. Open the Invoice record and verify the details.

Invoice - Home Dealers

New Save Search Delete Undo Print Email Post Recap Close

Details Attachments

Customer: HOMEDEALER Location: 1000-Location A Invoice Date: 06/29/2015 Post Date: 06/29/2015 Currency: USD Invoice No: SI-2

Bill To: US Ship To: US

US 18 Central St. Edison, OH, 43320 United States

US 18 Central St. Edison, OH, 43320 United States

Salesperson: JAS Terms: 5% 5 Net 30

Ship Via: FedEx Ground PO Number:

Ship Date: 06/29/2015 Due Date: 07/29/2015

Comments: HDTN-1 - AHE-hr Freight Terms: Deliver/Pickup:

| Item No | Description | UOM | Ordered | Shipped | Discount | Tax | Price | Total |
|--------------|--------------|-----|---------|---------|----------|------|-------|-------|
| Installation | service type | | 10.00 | 10.00 | 0.00 | 0.00 | 6.11 | 61.10 |
| | | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

Subtotal: 61.100000
Shipping: 0.000000
Tax: 0.000000
Total: 61.100000

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