Bulk invoicing

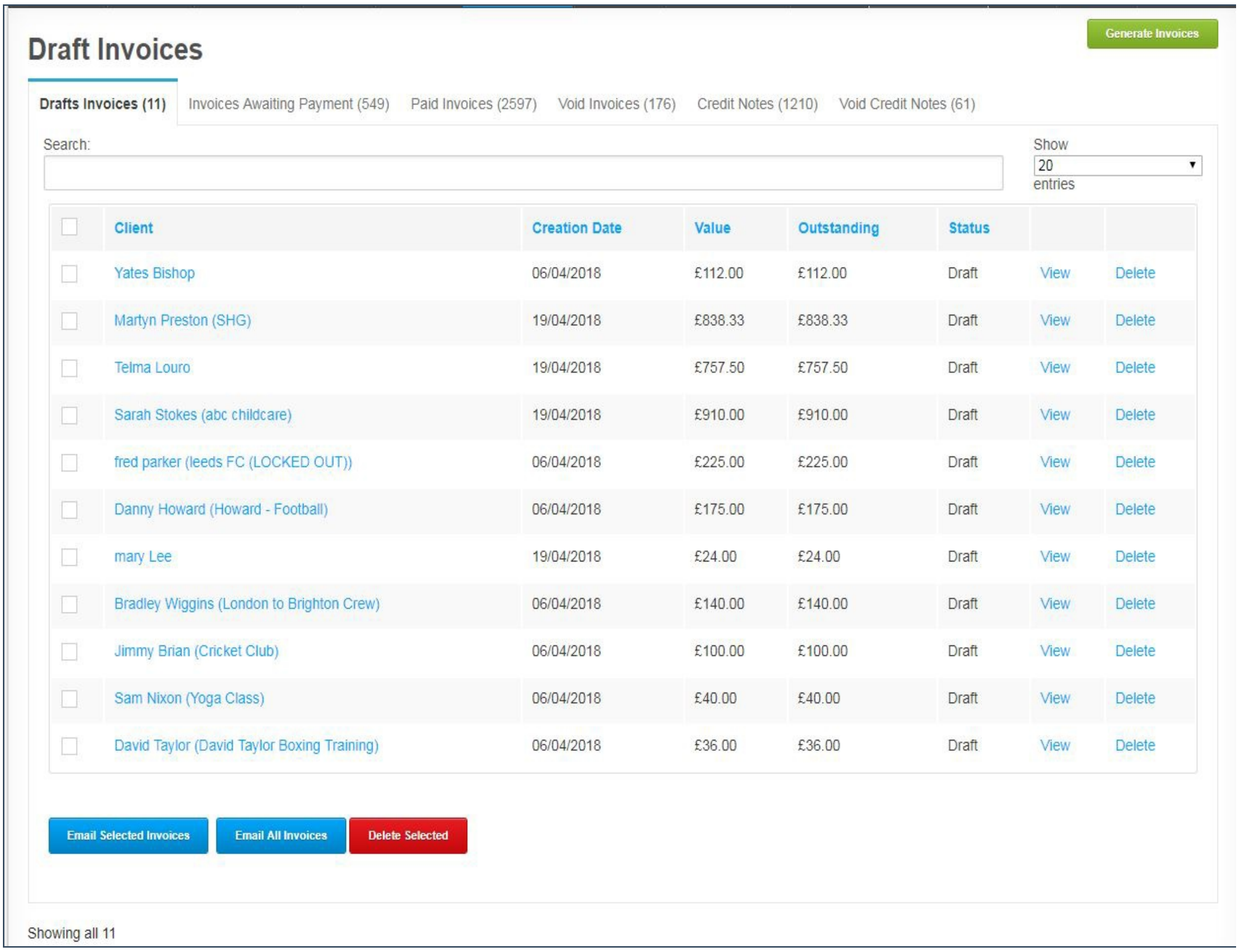
Last Modified on 06/11/2020 10:04 am GMT

Here's the steps to follow when it's time to do your monthly invoice run:

- Select the **Invoices** tab
- Click on the Generate Invoices button in the top right corner
- Choose the dates you wish to invoice for and click Generate . A draft invoice will be raised for each client for all the confirmed bookings in that period that haven't yet been invoiced.
- You will then be taken to the **Draft Invoices** sub-tab and be able to view the invoices created.

TIP *Invoices will continue to load until the loading symbol next to the Generate Invoices button disappears. All should be generated within a few seconds but it will depend on how many you have!*

- From here, you are able to view individual invoices if required prior to sending.
- Invoices can be sent on an individual basis by selecting the required invoices and clicking Email Selected Invoices
- Alternatively, click on Email All Invoices to send all invoices.



Client	Creation Date	Value	Outstanding	Status		
Yates Bishop	06/04/2018	£112.00	£112.00	Draft	View	Delete
Martyn Preston (SHG)	19/04/2018	£838.33	£838.33	Draft	View	Delete
Telma Louro	19/04/2018	£757.50	£757.50	Draft	View	Delete
Sarah Stokes (abc childcare)	19/04/2018	£910.00	£910.00	Draft	View	Delete
fred parker (leeds FC (LOCKED OUT))	06/04/2018	£225.00	£225.00	Draft	View	Delete
Danny Howard (Howard - Football)	06/04/2018	£175.00	£175.00	Draft	View	Delete
mary Lee	19/04/2018	£24.00	£24.00	Draft	View	Delete
Bradley Wiggins (London to Brighton Crew)	06/04/2018	£140.00	£140.00	Draft	View	Delete
Jimmy Brian (Cricket Club)	06/04/2018	£100.00	£100.00	Draft	View	Delete
Sam Nixon (Yoga Class)	06/04/2018	£40.00	£40.00	Draft	View	Delete
David Taylor (David Taylor Boxing Training)	06/04/2018	£36.00	£36.00	Draft	View	Delete

TIP *to ensure that your client accounts are up to date, complete the following steps once you've invoiced:*

- From the **Credit Notes** tab, allocate any unallocated credit notes
- From the **Payments** tab, filter the page by 'Unallocated' and ensure that any unallocated payment are applied to the recent invoice