

CabVista: Invoicing in the middle of the month

You normally invoice your customers monthly (or weekly) using Invoice Manager. But what if you have a customer who needs invoicing twice each month? You can do it, using these steps:

- 1) Go to "Invoicing → Customers & Admin Fees".
- 2) On the right-hand-side, move to the "Invoicing" page (not the "Basic" page).
- 3) Click on the first customer that you wish to invoice mid-month, and change his "Period" to "Ad-hoc". Repeat for all such 'mid-month' customers.
- 4) On the 16th of the month, go into Invoice Manager, and choose "Import more jobs" in the usual way, **changing the "Date to import jobs up to" to be the 15th**. When asked to **"Select the Accounts whose jobs you wish to import"**, choose the "Ad-hoc" customers only by clicking the "Ad-hoc only" button at the bottom of the screen. Then proceed in Invoice Manager as usual.
- 5) On the 1st of the following month, repeat the process, only this time choose "Monthly only" (or leave all the customers selected if you wish to invoice the 'mid-month' customers at the end of the month too). Then proceed in Invoice Manager as usual.

In this way, you are invoicing the "ad-hoc" customers only at the mid-month point, and the monthly customers (or all customers) at the end of the month.

If you have any questions, please ask: info@cabvista.com