



JIBE

Latest Features and refresh of existing Features
3.8.3 - 2015

Table of Contents

General JIBE Features and Common Uses	3
New Features	4
Advanced Features.....	9

General JIBE Features and Common Uses

1. Bulk invoicing of multiple jobs at once.
2. Ability to change Line statuses on Jobs in Bulk (e.g. Write-off lines, set lines to Ready to Invoice or Back to Work in Progress)
3. Ability to generate bulk recurring invoices against Jobs – great for fixed maintenance activities, support plans etc.
4. Ability to group common lines on a Job
5. Ability to run Clarity Reports from within JIBE.
6. Ability to filter and group lines, and then reorder the Job lines.
7. Ability to edit line prices, total price, narrations etc.
8. Ability to set a Global Invoice Message

Bulk Line updates at Job Level

Drag a column header here to group by that column

Job Code	Job No	Status	Acc No	Client	Title	Job Manager	Quoted	Material
23	10	IN PROGRESS	23	DANIEL PAYNE LTD	Ongoing Support	SAFARI	\$0.00	\$1,85
108	108	IN PROGRESS	24	DOROTHY HEDGES LTD	FITNESS GYM	FOUR JK	\$6,600.00	\$2,70
58	58	IN PROGRESS	11	OWEN DENTON	SETTE SURVEY		\$2,750.00	\$

Context menu options:

- Open Job
- Attach to Master Job
- Select All
- Deselect All
- Set Lines As...
 - Ready To Invoice
 - Work In Progress
 - Written Off
 - Cancelled
- Price Policies
- Refresh

Clarity Reports from with JIBE

Jobs

Drag a column header here to group by that column

Master Job...	Job Code	Job No	Status	Acc No	Client
27	27	27	IN PROGRESS	29	TRENT TALBOT
3045	3045	3045	NEW JOB	5	D & C PANELBEATERS
31	31	31	WEB INVOICED	24	DOROTHY HEDGES
			IN PROGRESS	12	PAUL HOLLAND MOTOR
			IN PROGRESS	12	PAUL HOLLAND MOTOR

Context menu options:

- Open Job
- Attach to Master Job
- Select All
- Deselect All
- Set Lines As...
- Clarity Reports
 - JCHUninvoicedJobs
- Refresh

Clarity Reports

New Features

The ability to set the period and Invoice date at Login

A new feature is to have the user set the period and invoice date during the login process so that this step is not missed when billing.

Exosoft Job Invoice Batch Engine

Job Invoice Batch Engine

Choose a database connection to enter the system. 3.8.3015.4

Database: DEMO 20153

User: EXO BUSINESS ADMIN ACCOUNT

Password:

Period: August 2015

Invoice/Write Off Date: 31/08/2015

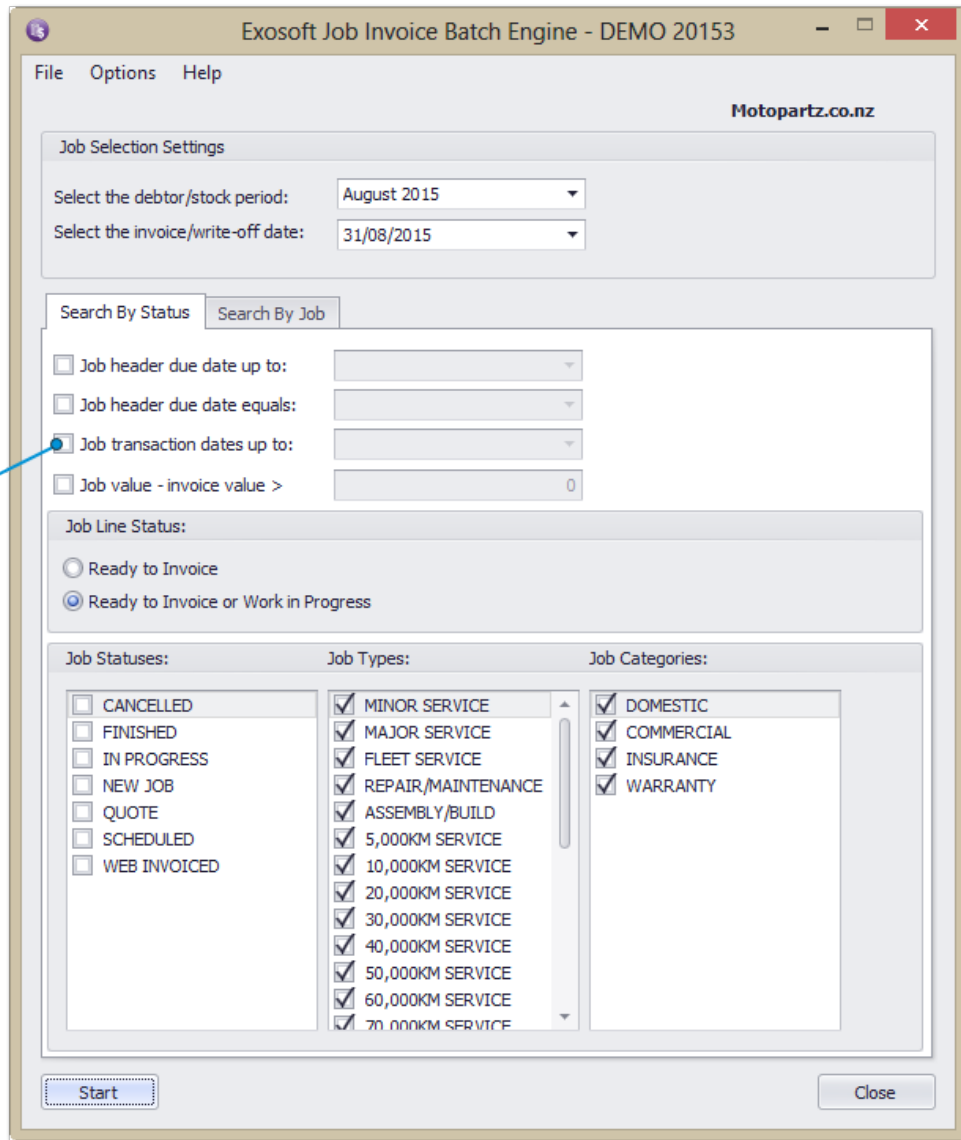
Login Close

Period Selection

Invoice Date Selection

The ability to invoice Jobs based on a Job Header Due Date and then reset that Due Date to a future date

– Great for billing ongoing subscription items.



[Recurring Invoicing created from the Quote lines of the Job.](#)

- Can be used in tandem with the above feature.

In the Settings in JIBE enable recurring transactions.

JIBE Settings

General Master Sub Jobs **Recurring Transactions** Extra Fields

Enable Recurring Transactions

Recurring Transactions Settings

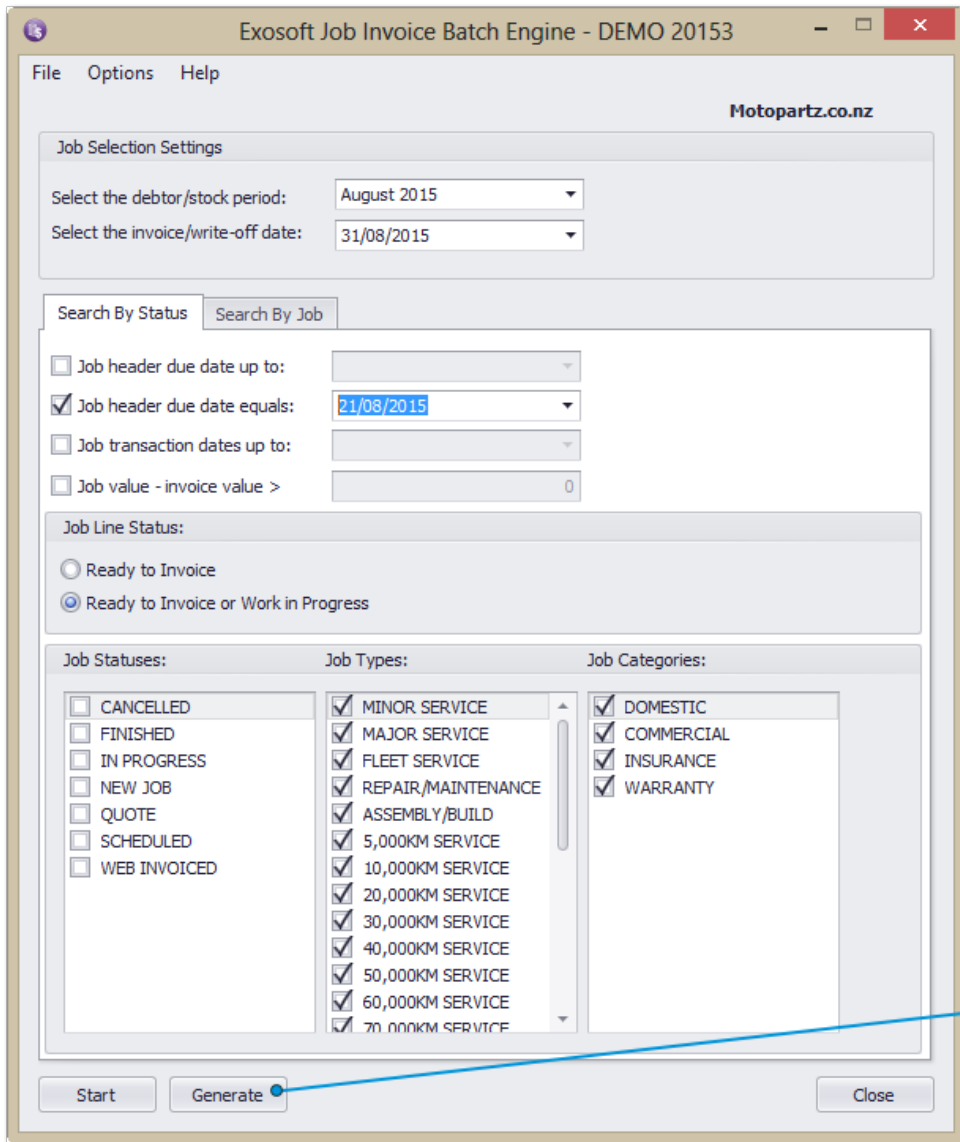
Recurring Billing Staff: BRIDGET FAIRWEATHER

Select Quote Line Cost Groups that will be set to generate recurring transactions

	Cost Group	Line Status
<input type="checkbox"/>	DISBURSEMENTS	Work In Progress
<input checked="" type="checkbox"/>	PROFESSIONAL SERVICES	Work In Progress
<input type="checkbox"/>	WORKSHOP EXPENSES	Work In Progress

Save Cancel

Recurring Transactions



Generate

Click to create recurring invoices off a Job from Quote Lines.

[Updating of Job Due date post invoicing and ability to set an Invoice Message](#)

– writes a narrative line against DR_TRANS.

Job Batch Invoice Engine

JIBE will now invoice 1 job(s)

Details

Invoice Date: 31/08/2015
Debtor/Stock Period: August 2015
Job Status After Invoicing: No Change
 Set New Due Date: 21/08/2015

Branch Assignments

Time Entries: Job
Other Costs: Job
TimeTrak Disbursements: Job

Narrative

Set Invoice Narrative:
Specials for this Month
20L of Oil for \$30

Are you sure you want to continue? Yes No

Set New Due Date

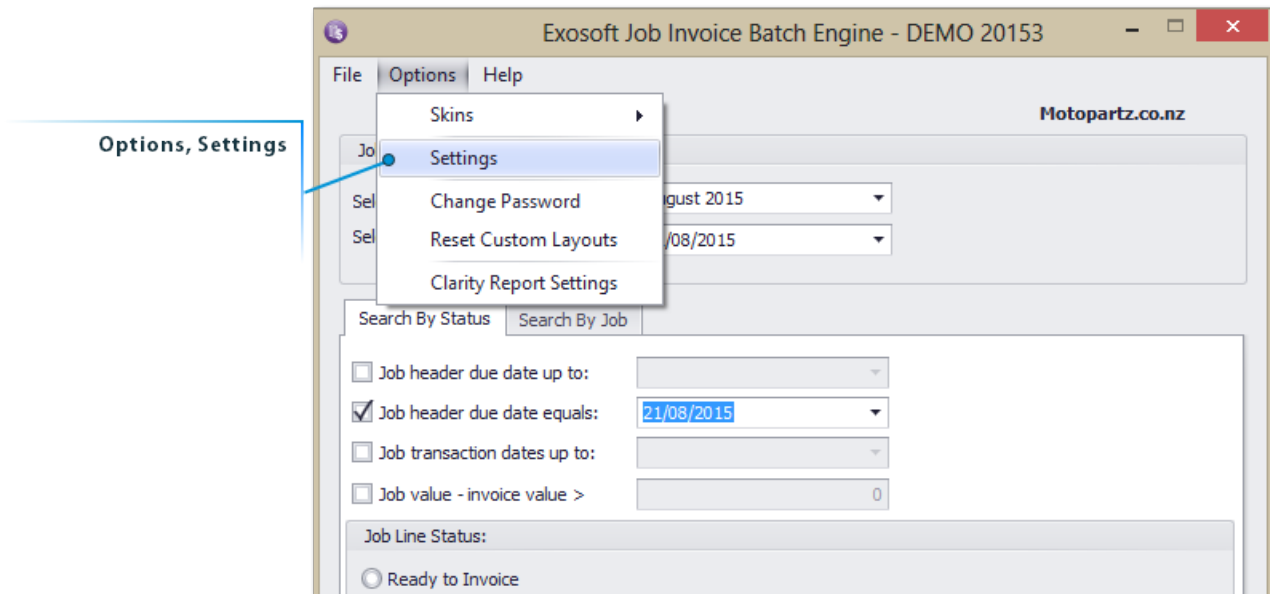
This will update the Jobs Due Date

Invoice Narrative

This will display on all generated invoices.

Advanced Features

JIBE has a range of advanced settings and configurations, which can be accessed via the Options, then Settings menu.

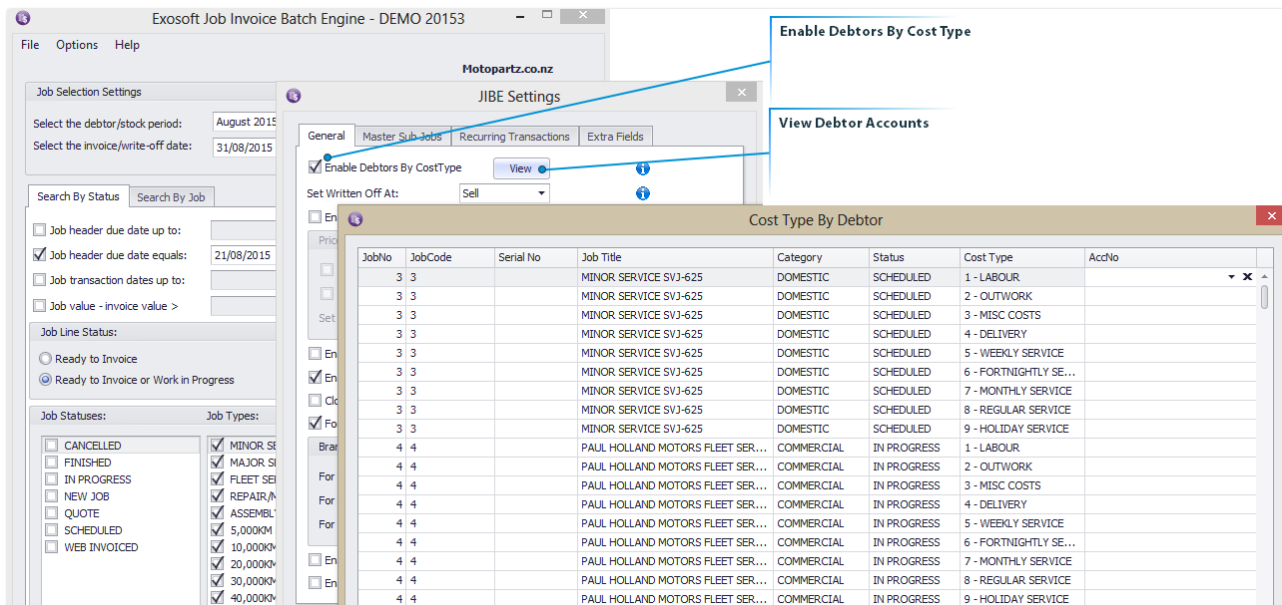


Some of the key features are:

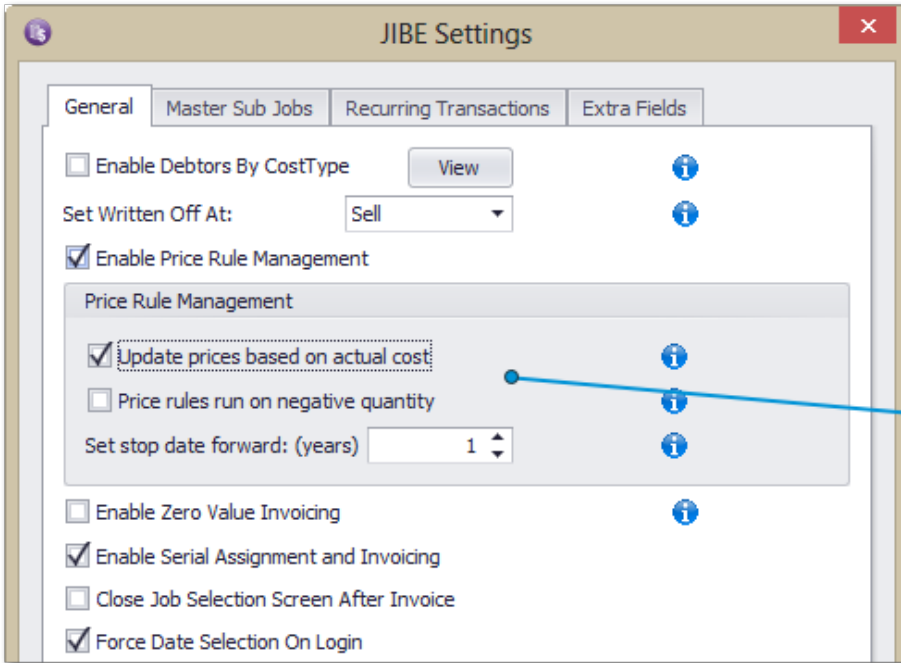
1. Debtor Invoicing by Cost Type – this is a feature where you may assign a different debtor to different costs types, allowing lines on the same Job to be invoiced to different Debtors, saves the complexity of using Sub Jobs. Could be 10 lines on one Job, but three different debtors.

This is good for:

- a. Insurance excess getting billed to the client directly – rest of job to Insurance Company.
- b. Service installation e.g. Sky, Internet where customer pays a fee, and rest goes to Provider.



2. Ability to create and Manage Price Rules against jobs based on Actual Cost + Markup
MYOB EXO only supports “Retail less” price rules. In contracting environments it is common practise to price a Job based on Actual Cost + a standard Markup. This feature allows you to run that price rule against all of your selected Jobs.



3. Ability to assign Serial Numbers against Stock put onto jobs for invoicing.

