



## Activities and Items on Invoices

### Support Notes

This support notes are suitable for:

- MYOB Premier
- MYOB Premier Plus

#### **Solution Summary**

MYOB enables you to include inventory items on time billing invoices.

To activate this option:

Go to the Setup menu, choose Preferences, click the System tab and mark the option I Include Items On Time Billing Invoices, then click OK

In service type industries, it's quite often necessary to combine labour charges and inventory on a sales invoice. MYOB's Time Billing module easily accommodates this by allowing Time Billing Activities and Items to be included on the same Time Billing invoice.

#### **How do I setup my company file so items can be included on time billing invoices?**

Items are easily inserted into Time Billing invoices by simply adding the Items after preparing the Time Billing invoice. The flexibility of your MYOB program also allows you to include Headings and Subtotals; adding real functionality to your invoices.

There are no setup steps needed to activate the ability to include Headings and Subtotals. However, before Items can be added to a Time Billing invoice you must activate this option:

1. Go to Setup choose Preferences and click the System. Place a check mark against the I Include Items On Time Billing Invoices option then click OK.
2. Mark the I Include Items On Time Billing Invoices option then click OK.

## **How are items added to a time billing invoice?**

The steps below outline how to include Items, Headings and Subtotals on Time Billing invoices.

1. Create the Time Billing invoice by going to the Time Billing command centre and clicking Prepare Time Billing Invoice. Select the Customer, the Activities then click Prepare Invoice.
2. With the Time Billing invoice displayed, place your cursor in the Date field of the first line of the invoice, go to the Edit menu and choose Insert Heading; enter Heading text such as: Labour.

The first Activity will be moved down to the next line when the Heading is inserted.

3. Place your cursor in the Date field on the next free line after the last Activity, then go to the Edit menu and choose Insert Subtotal. Enter the Subtotal text then press the <tab> key.
4. Place your cursor in the Date field on the following line. Go to the Edit menu, choose Insert Header then enter the Header text.
5. Position your cursor in the Hrs/Units field on the next free line. Enter the quantity of Items being sold then press the <tab> key again to move to the next field.
6. Press the <tab> key once again to display your Items List. Select the Item to be sold then click Use Activity or Item.
7. Repeat Steps 5 & 6 for all the items to be included on the invoice.
8. Place your cursor in the Date field on the first blank line after the last Item. Go to the Edit menu, choose Insert Subtotal and enter the Subtotal text. Check the invoice details then click Record.

The following window shows a Time Billing invoice which includes Items, Headers and Subtotals.

INVOICE ▾
Customer ⇨: Cameron, James    Terms ⇨: 2.5% 1st Net 30th after EOM     Tax Inclusive

Ship to ▾: James Cameron  
34 Bailey Avenue  
Moorabbin Victoria 3025

Invoice #: 00000101  
Date: 29/05/2003  
Customer PO #:

Date	Hrs/Units	Activity	Notes	Rate	Amount	Job	Tax
Labour							
29/05/2003	1 ⇨	Service01	Service Charge	\$104.50	\$104.50		GST
29/05/2003	2 ⇨	Service01	Service Charge	\$104.50	\$209.00		GST
29/05/2003	1 ⇨	Service01	Service Charge	\$104.50	\$104.50		GST
					Subtotal	\$418.00	
Parts Used							
	1 ⇨	100	Cooler Large™	\$520.00	\$520.00		GST
	1 ⇨	220	Cooler Filter Medium	\$43.00	\$43.00		GST
	1 ⇨	120	Cooler Filter Large	\$67.95	\$67.95		GST
					Subtotal	\$630.95	

Salesperson ⇨: Parker, Peter  
Comment: Thank you!  
Ship Via:  
Promised Date:

Subtotal: \$1,048.95  
Freight: \$0.00  
Tax ⇨: \$95.36  
Total Amount: \$1,048.95

Journal Memo: Sale; Cameron, James  
Referral Source:  
 Already Printed or Sent

Paid Today: \$0.00  
Payment Method: EFTPOS  
Balance Due: \$1,048.95

Save Recurring
 Use Recurring
 Reimburse
 WIP

Category:

**Can items be included if entering time billing invoice from the Sales command centre?**

Time Billing invoices can be recorded using either the Time Billing or Sales Command Centres