

# Statement Layouts



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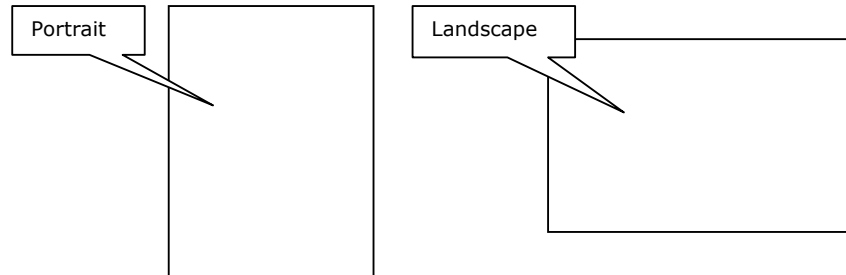
## Statement Layouts

The **Statement Layouts** option on the **Configuration** menu allows you to create your own invoice and driver statement templates. You can have as many different invoice and statement templates as you want and even allocate different invoice templates to different account customers and different statement templates to different drivers. This is particularly handy for customising invoices for certain account customers, for example one of your accounts may insist on seeing the name of person who booked the job listed on the invoice, whilst another might like to see the driver name next to each job.

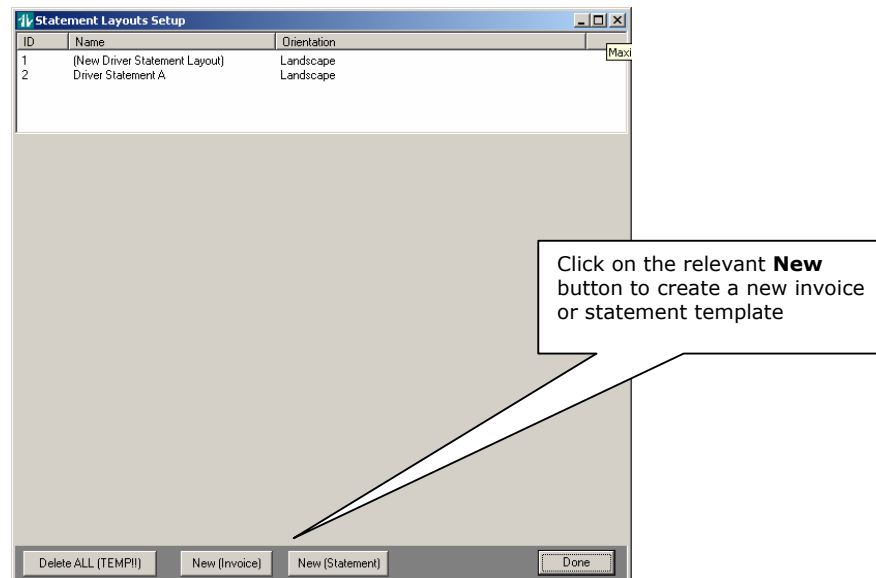
### Creating a new invoice/statement template

The statement layout interface is very easy to use to create both invoice templates and driver statement templates.

You can choose to have portrait or landscape templates, i.e. upright or sideways paper:



1. Click on the **Configuration** menu and choose **Statement Layouts**
2. The **Statements Layout Set-up** window will appear
3. You'll notice two **New** buttons at the bottom of the window. Click on the **New (Invoice)** button to create a new invoice template or click on the **New (Statement)** button to create a new statement template

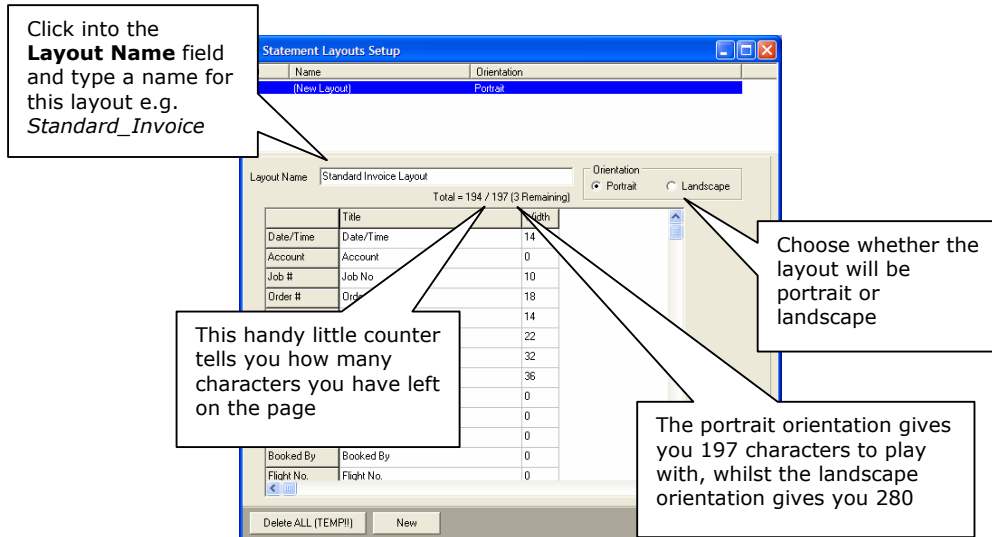


4. In this example we'll create a new invoice template but use exactly the same method for creating driver statement templates:

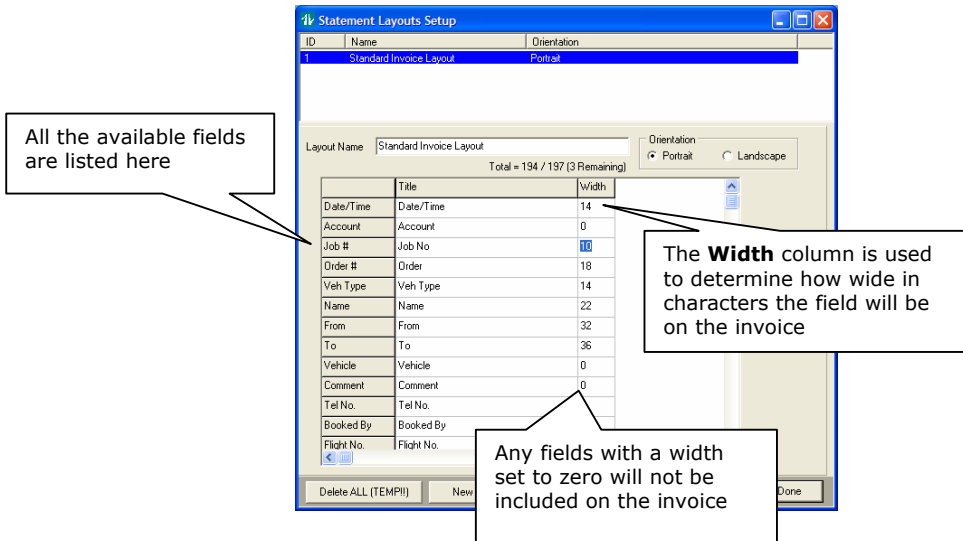
Click into the **Layout Name** field and type a name for this template, for example, you may call your standard invoice template that's used for most customers "Standard Invoice Layout" or if it's a layout for a account customer called ABC Ltd, you may name it "ABC Invoice"

5. Choose whether you want the template to be portrait or landscape – bear in mind that you'll need more width if you want lots of bits of information (fields) printed on the invoice, so landscape orientation might be better.

Portrait orientation gives you 197 characters to play with, whilst the landscape gives you 280 characters. You can always start with portrait and then change to landscape if you run out of space! There's a handy little counter that tells you how many characters you have left as you're building the layout.

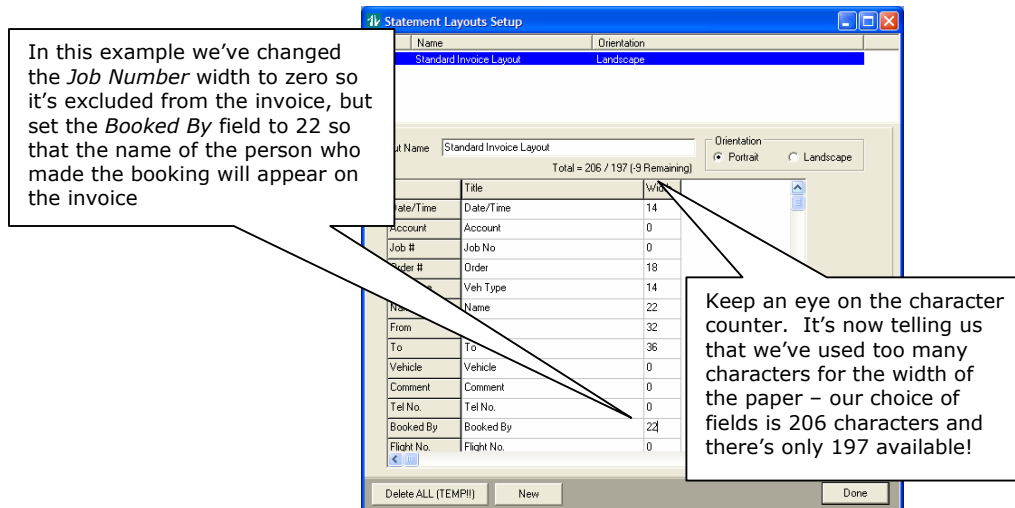


6. It's now time to start creating the actual invoice layout and deciding which bits of information you want included on the invoice. In the lower half of the window you'll see a list of all the available fields that could be used. The **Width** column determines how wide the field will be on the invoice and is counted in characters. Any fields with a width set to zero will not be included on the invoice.



7. Scroll down through the list and take a look at the available fields.
8. If you want to exclude a field from the invoice layout, double click on the width number and change it to zero. For example, the default invoice layout includes the Job Number which is set to 10 characters in length. If you don't want the Job Number on the invoice, double click on the width which is currently set to 10 and type 0. The job number will now be excluded from the invoice.
9. Keep an eye on the character counter. It's now telling us that we've used too many characters for the width of the paper – our choice of fields is 206 characters and there's only 197 available!

If this happens you have two choices – you can either remove other fields that maybe aren't necessary or switch to a landscape orientation.



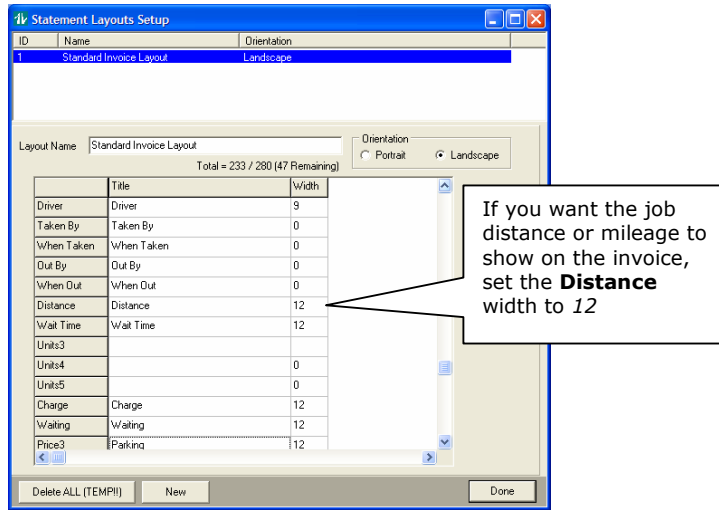
10. Carry on working your way through the list removing or adding fields as necessary.

- Click **Done** when you've finished

*TIP! How many characters do I use for each field?*  
 Well there's a question! This bit is simply trial and error! Set the characters to a certain width and then run an invoice and preview it to see what it looks like. It might take some tweaking!

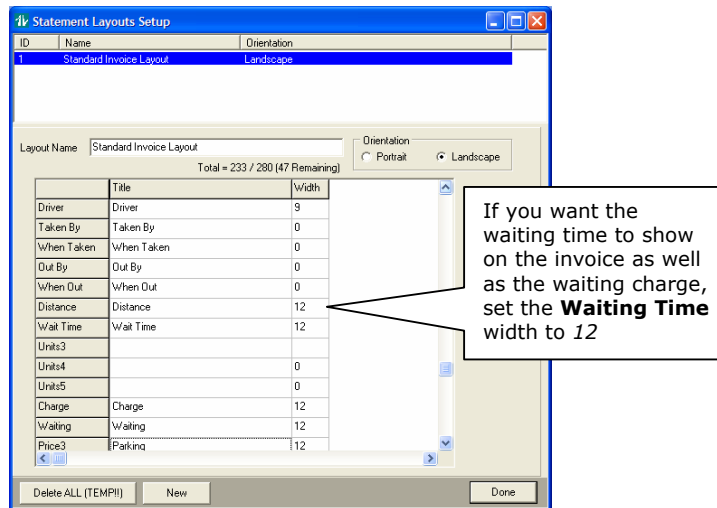
### Showing distance/mileage on the invoice

If you want to show the job distance or mileage on the invoice, set the **Distance** field width to say 12.



### Showing waiting time

If you want the waiting time to be shown on the invoice as well as the waiting charge, set the **Wait Time** width to 12.

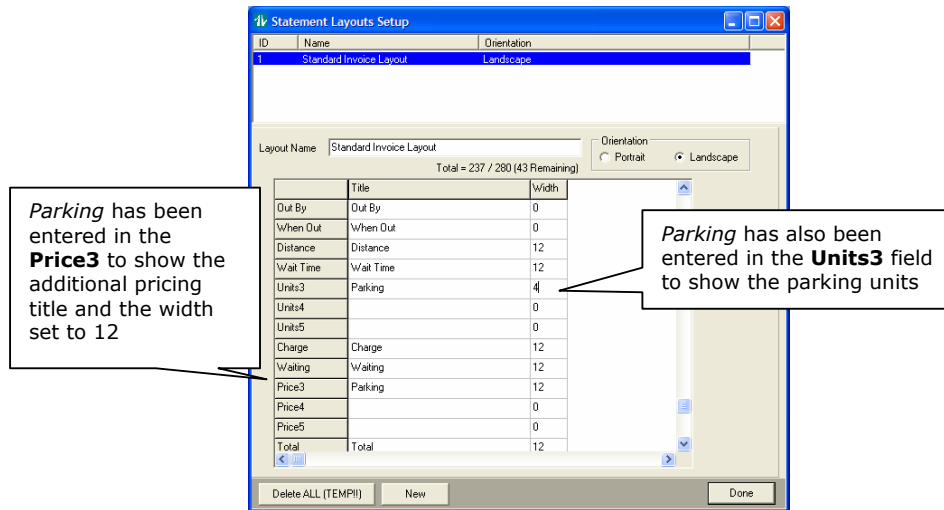


## Adding an additional pricing title

If you're using additional pricing titles on the invoices such as *Parking* and *Extras*, you'll need to create customised fields in the invoice layout.

There are three additional fields that are used for the additional pricing titles; **Price3**, **Price4** & **Price5**, and **Units3**, **Units4** & **Units5**.

The **Price** fields are used to show the actual charge for the additional pricing title, whilst the **Units** fields are used to show the units of each additional title. For example, if your system is set up to show *Parking* as an additional charge, *Parking* would be entered in the **Price3** field which would show the total amount spent on parking for that job i.e. £10.60. The £10.60 may have actually been made up of two different parking charges – one at each end of the journey. If you also wanted to show 2 units of parking on the invoice, you would also enter *Parking* in the **Units3** field.

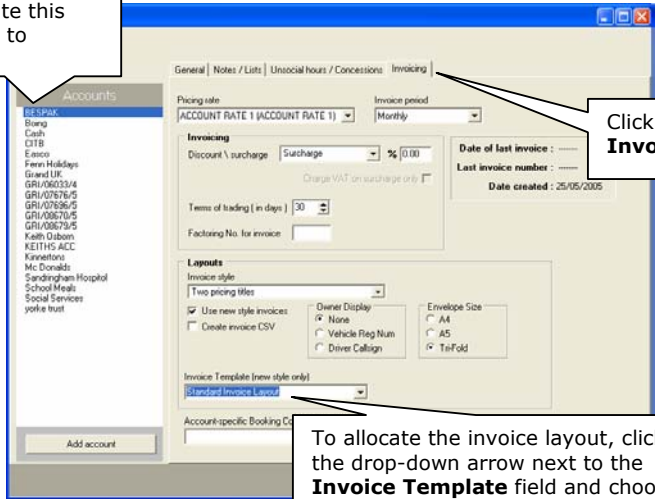


## Allocating an invoice template to a customer account

Each customer account will default to the standard invoice layout. When you're ready to use your new layout you must allocate it to either individual accounts or all accounts.

1. Click on the **Accounts** menu and choose **Edit Accounts**
2. Click on an account you want to allocate the invoice layout to and then click on the **Invoicing** tab
3. To allocate the invoice layout, click on the drop-down arrow next to the **Invoice Template** field and choose the new layout from the list

Select an account you want to allocate this invoice layout to



Click on the **Invoicing** tab

To allocate the invoice layout, click on the drop-down arrow next to the **Invoice Template** field and choose the new layout from the list

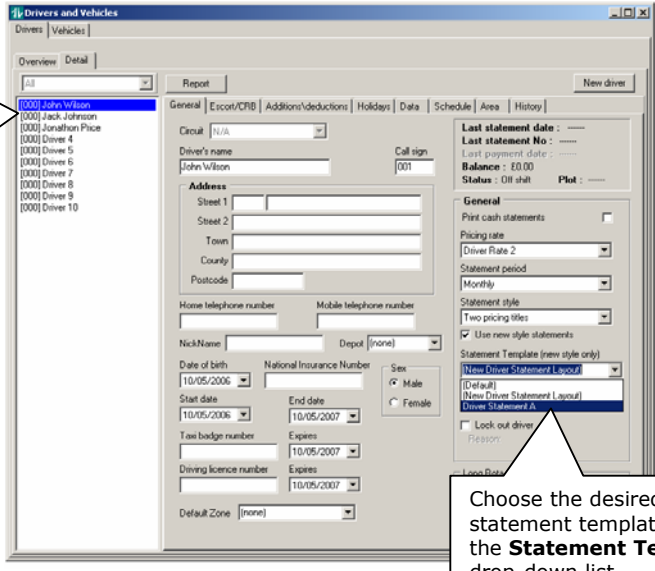
4. Click on the next account in the list and repeat the procedure, and continue for all accounts that you want to use this layout for

### Allocating a driver statement template to a driver

To allocate a driver statement template to a driver:

1. Click on the **Drivers & Vehicles** menu and choose **Edit drivers & vehicles**
2. Choose the driver from the list in the left-hand window
3. Click on the **Detail** tab
4. On the **General** page tab choose the **Statement Template** from the drop-down list

Choose the driver and then click on the **Detail** tab

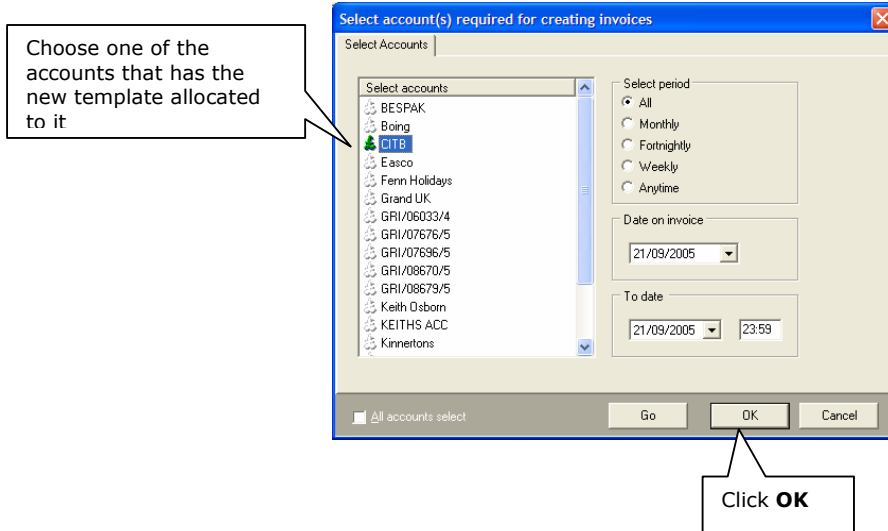


Choose the desired statement template from the **Statement Template** drop-down list

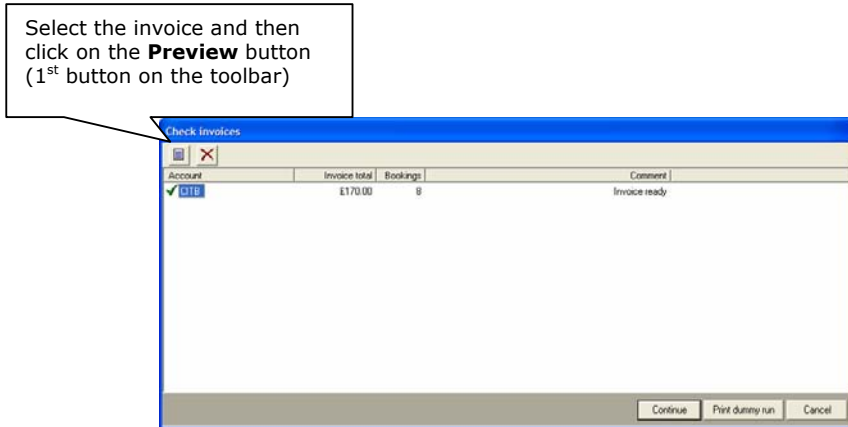
## Previewing an invoice

Once you've allocated this invoice layout to one or more accounts, it's an idea to preview the new layout to see how it looks. You don't need to run an invoice in order to preview it:

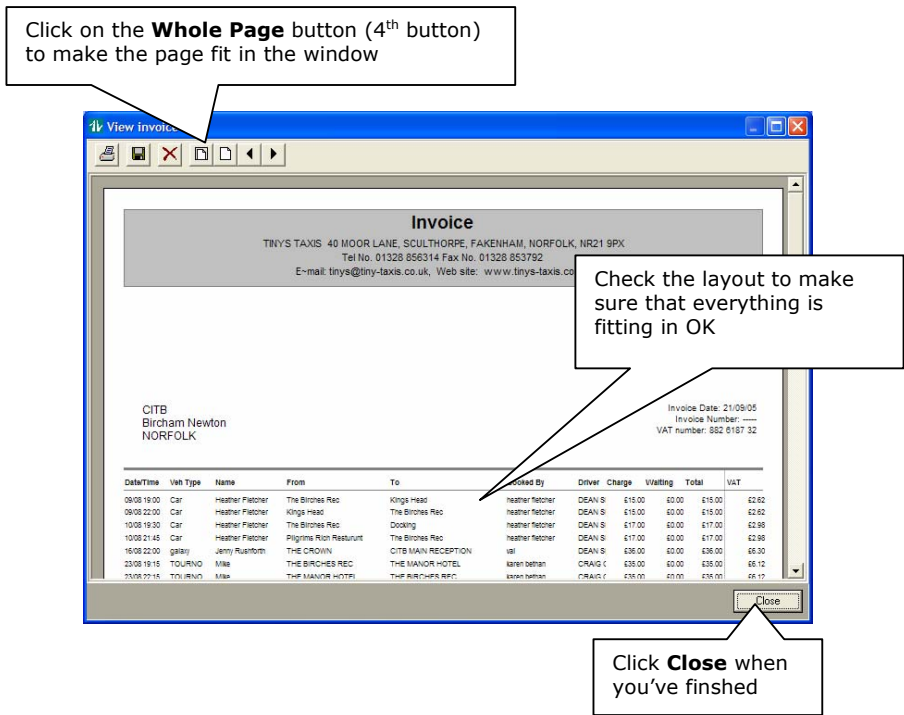
1. Click on the **Accounts** menu and choose **Invoicing**



2. Select the invoice and then click on the **Preview** button (1<sup>st</sup> button on the toolbar)



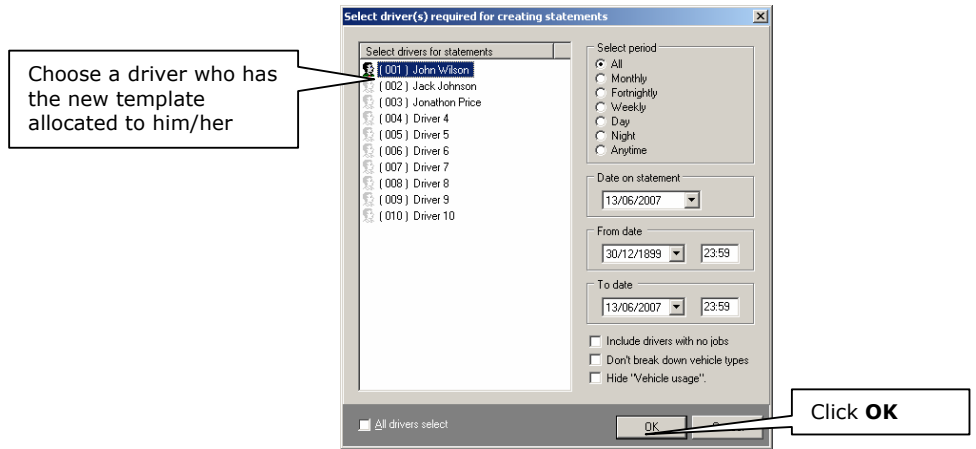
3. A preview window will open
4. Click on the **Whole Page** button to make the whole page fit snugly in the window
5. Check the layout to make sure that everything is fitting in OK
6. Click **Close** when you've finished



## Previewing a driver statement

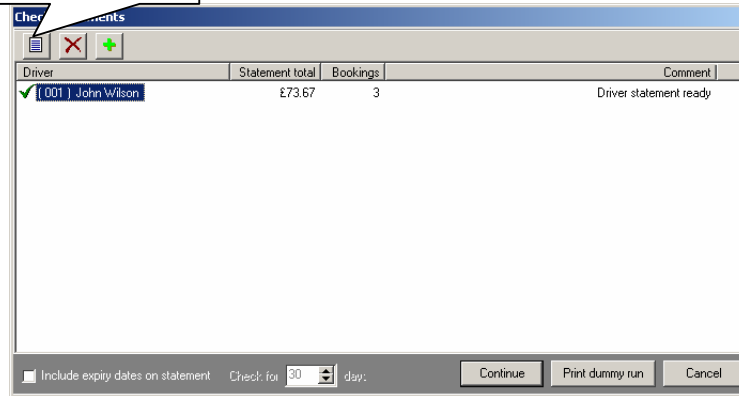
Once you've allocated this template to one or more drivers, it's an idea to preview the new template to see how it looks. You don't need to run a statement in order to preview it:

1. Click on the **Drivers & Vehicles** menu and choose **Statements**



2. Select the statement and then click on the **Preview** button (1<sup>st</sup> button on the toolbar)

Select the driver statement and click on the Preview button on the toolbar



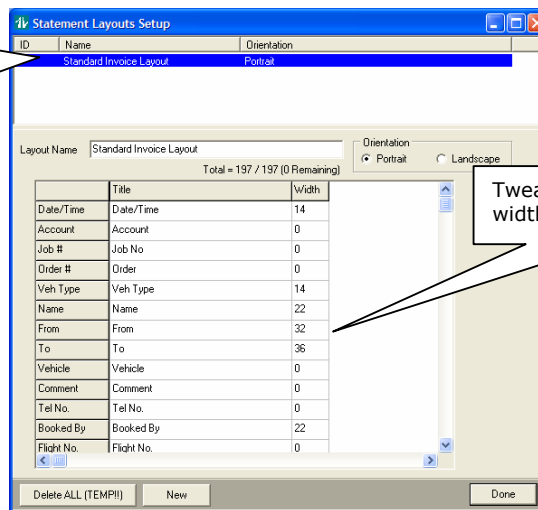
3. A preview window will open
4. Click on the **Whole Page** button to make the whole page fit snugly in the window
5. Check the layout to make sure that everything is fitting in OK
6. Click **Close** when you've finished

### Making amendments to the template

After previewing, you may find you need to make some amendments to the template:

1. Click on the **Configuration** menu and choose **Statement Layouts**
2. The **Statements Layout Set-up** window will appear
3. Select the template from the list at the top of the window and tweak the fields and widths as necessary

Select the template from the list



Tweak the fields and widths as necessary