

Service Industry Management System

My Company
COMPANY LOGO

Phone: 0000 000 0000 - Fax: 0000 000 0000 - Email: info@company.com - Web: www.company.com

Select: Company Company Name: The Other Company

Client Name:

Client Number:

Create New Invoice
Click Red Button Below

Client Address Line 1: 1 The Company

Client Address Line 2: The Road

Client Address Line 3:

Client Town/City: Large City

Client Postcode: ST1 2RT

This is a job card, you create one (using the original template) for each and every client. Fill in their name, address and client number and you can upload them to the client list database.

Client Address Line 2: The Road

Client Address Line 3:

Client Town/City: Large City

Client Postcode: ST1 2RT

Client Phone Number: 0203 333 333

Client Mobile Number: 0780 078 0780

Client Email Address: business@email.com

In case of emergency call: Name:

Email:

Number: Relationship:

There is also a place for you to put in an emergency contact (if required) as well as contact details. As you can see, uploading the data to the database or creating a new invoice, can be done at the touch of a button.

CLIENT LIST				
Job Number	Surname/Company Name	First Name (If Applicable)	Address	Phone Number
1	Smith	John	1 The House,The Street,,Smal Town,ST3 3RD	0750 750 7507
2	The Other Company		1 The Company,The Road,,Large City,ST1 2RT	0780 078 0780

Once the data is captured in the job card and uploaded, you will be able to see it on the client list database. A list of all of your clients in one spot.

INVOICE
COMPANY LOGO

Phone: 0000 000 0000 - Fax: 0000 000 0000 - Email: info@company.com - Web: www.company.com

Invoice Date: 07/11/2013 Inv Number: 1

Name: The Other Company

Address: 1 The Company, The Road, , Large City, ST1 2RT

Client Number: 2

Date	Code	Details	Amount (Exc VAT)
07/11/2013	1238	Price Description 5	2,500.00
07/11/2013	1237	Price Description 4	2,000.00

This is the invoice that is automatically generated with the information from the job card as you require it. You can create as many as you need per client. The prices are pulled from the price list, all you do is select the details from a drop down list.

Date	Code	Details	Amount (Exc VAT)
Total Excluding VAT:			4,500.00
VAT at Current Rate: 20%			900.00
Total Amount:			5,400.00

Bank Details: Bank:

Company Number: 00 0000 000 My Company Company Name

VAT Number: 000 00000 0000 0000 Account Number

Anything Else: You tell me 00-00-00 Branch/Sort Code

The invoice contains information like banking details and even has a section where you are able to add other amounts that do not appear in your price list. This includes discounts.

INVOICE LIST						Total Invoiced	Total Paid	Outstanding
						7,200.00	5,400.00	1,800.00
Invoice Number	Job Number	Surname/Company Name	Amount Exc VAT	VAT	Amount Inc VAT	Amount Paid	Date Paid	Status
1	2	The Other Company	£4,500.00	£900.00	£5,400.00	£5,400.00	07/11/13	✓
2	1	Smith	£1,500.00	£300.00	£1,800.00			✗

Once your invoices are done and uploaded (at the click of a button), they will appear on this invoice list, which will allow you to keep track of who has paid and what is still outstanding. A must have for any business.

PRICE LIST				Insert New Entry
Description	Code	Price (Exc VAT)	Comments	
Price Description 1	1234	£500.00		
Price Description 2	1235	£1,000.00		
Price Description 3	1236	£1,500.00		
Price Description 4	1237	£2,000.00		
Price Description 5	1238	£2,500.00		

This is a central price list which as you can see allows you to upload new entries. Each and every job card can be updated at any time to match this price list. All of these entries will be available for you to select when creating an invoice.

DATA PAGE - ONLY FILL IN WHITE BLOCKS	
Current VAT Rate:	20.00%
Client details for database	
2	The Other Company 1 The Company, The Road, Large City, ST1 2RT 0780 078 0780
Company Details	
Company Name:	My Company
Sub Header Contact Details:	Phone: 0000 000 0000 - Fax: 0000 000 0000 - Email: info@company.com - Web: www.company.com
Foot Note Details:	
Foot Note Details:	Company Number: 00 0000 000 - VAT Number: 000 000000
Foot Note Details:	
Invoice Details	
Company Number:	00 0000 000
VAT Number:	000 00000
Anything Else:	You tell me
Bank:	The Bank
Account Number:	0000 0000
Branch/Sort code:	00-00-00

You are able to keep all of your company details up to date so there is no need to panick of any information changes, just update it.

A	B	C	D	E
Invoice Details				
Company Number:	00 0000 000			
VAT Number:	000 00000			
Anything Else:	You tell me			
Bank:	The Bank			
Account Number:	0000 0000			
Branch/Sort Code:	00-00-00			
Company Name:	My Company			
Company Logo				
Insert your logo as a picture in the white block to the right of this. Make sure that your logo fits within the black box, anything outside of the box will be lost.		COMPANY LOGO		

As you can see here, even your company logo can be updated.

This spreadsheet is ideal for small or medium companies in any service industry. We are able to customise it further for you if needed. Please don't hesitate to contact us if you require this, or any other bespoke spreadsheet! Check out what we do by clicking the image below and then services.

Click the logo below to visit our website to see what else we do!



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