
Online Invoicing for Contractors



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Introduction

Everyone struggles with invoices! You as supplier and contractor have the hassle of creating invoices, and getting them to the right people – then waiting for payment.

Managing Agents are processing the invoices as an Agent for their Freehold and RMC clients meaning all invoices have to be clearly labelled/addressed to the correct entity.

Your customers (the Property Managers) also have a whole complicated process to mark up invoices, and allocate them to the correct place before they can even think about paying them.

We have now introduced features to our online service that will allow you to send invoices for Work Orders and Contracts to Managing Agent customers electronically.

Plus paper invoices cost you money for you to create and send, for the property manager the logistics of managing and routing so much paper around the organisation is costly and complicated.

We now have the solution for this, via Dwellant. Online Invoicing allows you to simply upload your invoices, where you will be able to track them through to the point of payment.

Both you and your property management customers will benefit from this approach:

- Faster payment of invoices. By submitting online, they are with the property manager for approval the same minute you submit them.
- You save time postage and paper.
- you can track your invoice, they never get lost, and you know what they are waiting on.
- Your property management customers, get to cut down the steps in processing the invoice, plus because they are related to the work you have done, the invoice is already pre-tagged.
- If there is a query with an invoice you know immediately and the invoice is back on the path to approval as soon as you respond.

How Does Online Invoicing Work?

It's very simple

- Rather than posting paper invoices you simply upload them.
- Complete a few details such invoice number, amount and dates.
- The invoices are routed Automatically to the appropriate property manager.

There are 3 tools for uploading invoices:

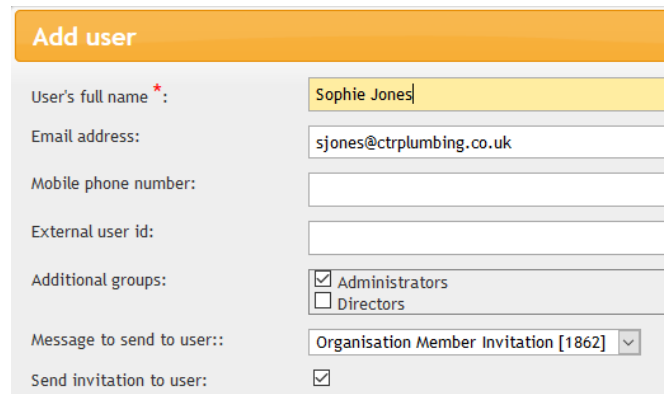
- **Email in** – just email to the address you have been given by your property manager.
- **One at a time** – When you mark jobs complete, attach the invoice at the same time
- **Bulk upload** – Drag and drop the invoices, once you have named them appropriately.

That's it. Your invoices are in the approval process, and instantly ready for approval, and payment.

How to get started?

You and your company are already registered on Dwellant and you can add other staff from your accounts department so they have access. From the Setup menu, select Users, and from there click the Add User button – you only need to enter their name, and email address and set them as administrators.

Please Note: Each email address that is used to send invoices **MUST** be registered with us. Please phone or email us if you need help setting this up.



Add user	
User's full name *:	Sophie Jones
Email address:	sjones@ctrplumbing.co.uk
Mobile phone number:	
External user id:	
Additional groups:	<input checked="" type="checkbox"/> Administrators <input type="checkbox"/> Directors
Message to send to user::	Organisation Member Invitation [1862] ▼
Send invitation to user:	<input checked="" type="checkbox"/>

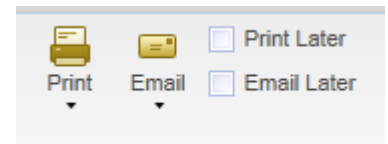
Your Accounting Package & Invoices

Regardless of the accounting package you use they will all have the following options.

- To create PDF (Portable Document Format) files. These electronic files can be sent and received and used by anyone.
- To directly email invoices in PDF format to a given address.

In QuickBooks for example, these options are shown in the top bar. When printing, options for your printer or PDF format files are shown.

Speak to your technical support for your accounting package if you don't know how to email an invoice.



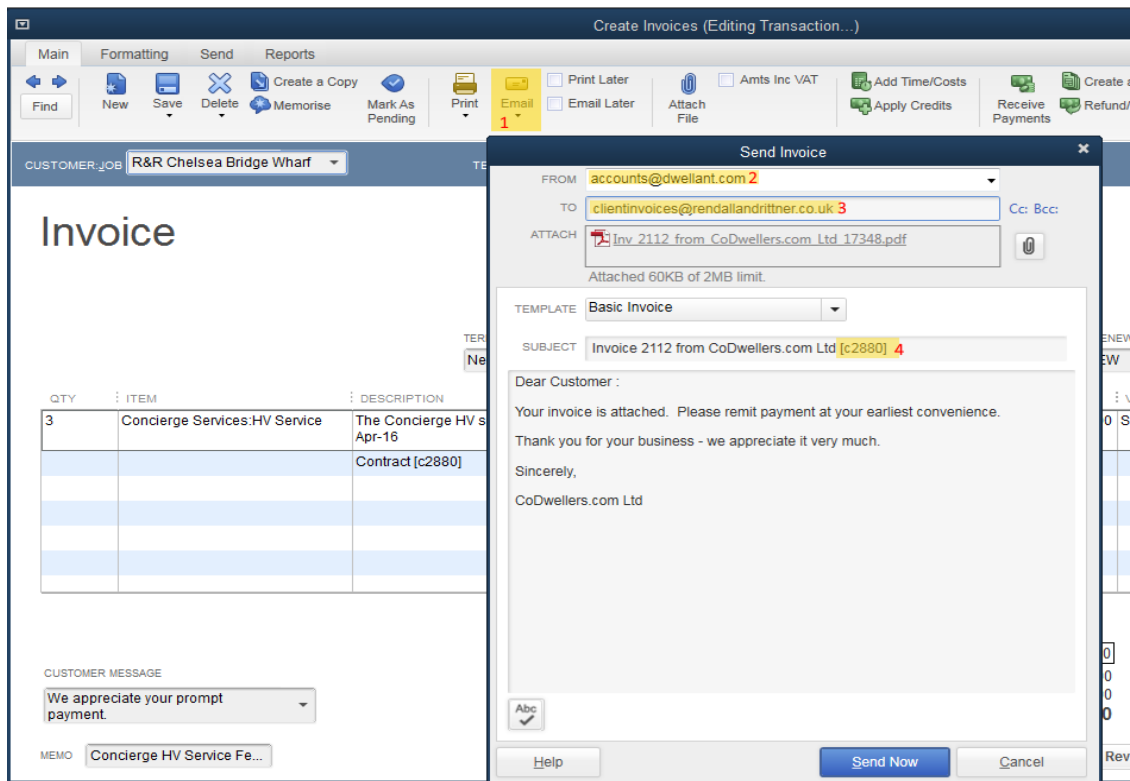
1. Email your Invoices

[Click Here](#) to view a list of the Managing Agents that are live with Online Invoicing

You can also get to this list via your account from the Setup menu select Managing Agents. You should be able to save this email address against each of your customer accounts in your accounting package.

If you do know the Work Order or Contract number please include this either in the filename of the invoice or in the subject of the email. Put the number in square brackets []. So for example a work order [345212] or contract [c2365].

Depending on your accounting package – it should be as simple as this:



1. Select email the invoice
2. Ensure you are sending from an email address that is registered with us
3. Send to the email address of your choice
4. Ensure that either the contract number or work order number is included in the subject in square brackets.

Simple Invoices – if you only have one document you need to send, then simply send the one invoice file as a PDF.

Invoices with supporting documents – If you have other documents you need to send with the invoice file (such as time sheets). You can attach multiple files to the invoice. In this case the invoice file **MUST** be in the filename. The invoice must be in PDF format, but other files can be in any format you wish.

You will receive a confirmation email for every invoice you send. This will tell you if there is anything the system doesn't understand. It will also include a link – that will then take you to the details form.

Once you have emailed the invoice...

You will receive an email reply as follows:

From: *Managing Agent* Online

To: (The email address you send the invoice from)

Subject: **Thank you for your invoice file: "Invoice Number 2112.pdf". Please read the email for next steps.**

Thank you for sending [*Managing Agent*] the invoice file: "Invoice Number 2112.pdf". Our reference number for it is: 99948

The invoice has been associated with Contract "Cleaning Service Melbourne House [c2880]"

We now need you to [Click here](#) to complete some details about this invoice.

Thank you

Use the [Click here](#) link to annotate the invoice. This will take you to a web page showing the invoice and the information that is required.

The screenshot shows the Dwellant web interface. The top navigation bar includes 'Home', 'Requests / Messages', 'Contracts', 'Invoices', and 'Setup'. The main content area displays an invoice form for 'Inv_2162_from_CoDwellers.com_Ltd_22868.pdf'. The form includes a table for invoice details and a form for work order or contract link information.

Qty	Description	Rate	Amount
3	The Concierge HV service for Package & Key Management for Feb-16 to Apr-16 Contract [c2880]	360.00	1,080.00

Invoice File: "Inv_2162_from_CoDwellers.com_Ltd_22868.pdf"

Work order or contract link: I received the Work Order or Contract through Dwellant (the reference can be found in square brackets eg [123456]) I definitely DO NOT have a Dwellant Work Order or Contract for the job. This option will take longer to process.

Building name *: Chelsea Bridge Wharf [4807]

Dwellant work reference *: [c2880] Concierge HV - Package/Key Delivery System

Contractor reference number *: 2162

Invoice date *: 25/01/2016 dd/MM/yyyy

Start date *: 01/02/2016 dd/MM/yyyy

Finish date *: 30/04/2016 dd/MM/yyyy

Price excluding VAT *: 900

Amount of VAT *: 180

Completing the fields and Clicking OK will submit the invoice for approval.

If any information is missing from the invoice the email will include details in red.

2. Complete your Work Order & attach the Invoice

When you mark the Work Order Complete From the Select Action... menu Select Complete as usual

You will now be asked an extra question Provide Invoice now or later

Request - Mark Complete ✕

Please mark this Request as complete by clicking on the Ok button. Only add a Comment if there were problems with the job.

Comment:

Completion date *:

Is comment private: Only allow property managers to view your comment

Invoice option *: Provide now Provide later

If you select Now, it will show a new form:

Upload Invoice ✕

Contractor reference number *:

Invoice date *:

Start date *:

Finish date *:

Price excluding VAT *:

Amount of VAT *:

Is this the only / final invoice for the work?:


Invoice file *: No file chosen Maximum total size 8 MB

The fields all have tool tips so as you click into them, they will each show their own help window.

Fill in each of the fields, attach you invoice from the Choose File, button and Click OK

1. Alternatively you might want to mark a Work Order as Complete, but not want to upload the invoices straight away.

As you do this, the Work Order will show with the "Invoice upload required".

	Tequila Wharf [82918]	Private	Repair Entrance Door	Today, 22/05/2014 09:31	Anchor Group / Work Requests	29/05/2014	Invoice upload required	<input type="button" value="Select Action..."/>
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You may choose to upload your invoices at the end of the month, in which case you can sort the table by clicking the Status column, which will then group all the “Invoice Upload Required” items together.

From the Select Action... against each Work Order select Upload Invoice.

The same simple form will be shown.

3. Bulk Invoice Upload

There is a 3rd option that is suitable where you have many invoices. The bulk upload facility allows you to upload multiple invoices in one simple drag-and-drop operation.

Preparation

For the most efficient process, as you save your invoices from the accounting package as a PDF, ensure the name of the file has the Work Order number in square brackets at the end of the filename. For example:

Door Repair [85690].pdf

The same applies to contracts which have references such as [c2881].

These details will be on the initial instruction for either a Work Order or Contract, but you can also check them by signing into your Dwellant account.

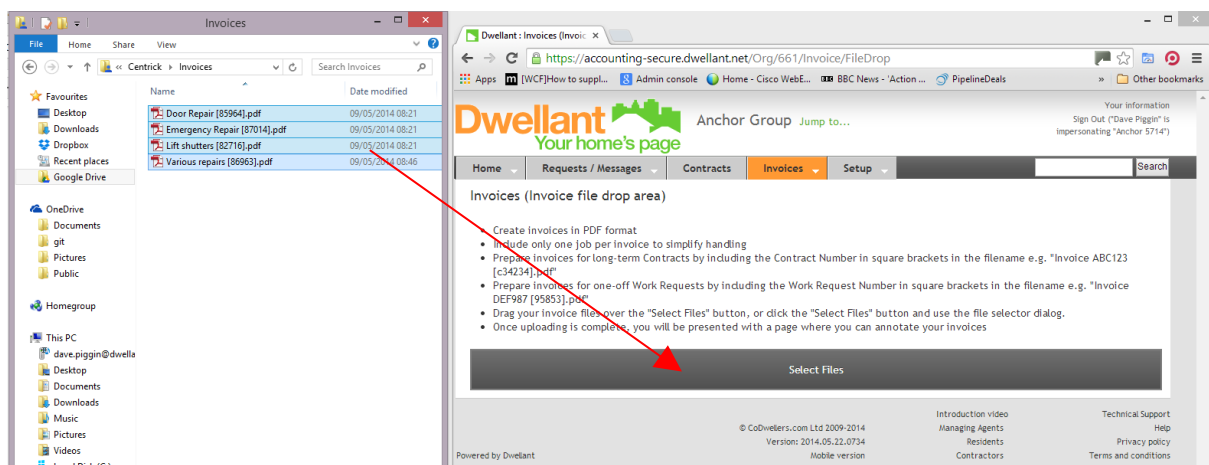
Uploading



Select the “Invoice file drop area” from the Invoice menu

You can either drag and drop the files, by:

Opening a file browser, selecting the files, and dragging the onto the large grey button

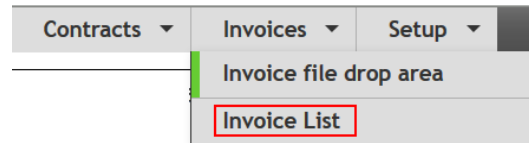


Or click the Select Files, button and browse and select the actual files.

Once selected the files will upload, one at a time & when complete will show a second screen “Invoice files to be annotated” (this is also accessible from the Invoice menu)

Annotating your Invoices

If you have uploaded your invoice by email or Bulk Upload – you will then need to annotate them by entering these few details for each invoice it will stream line their approval and payment.



Form the Invoice menu select Invoice List.

Upload time	Uploaded file name	Invoice date	Your reference number	Price	Status	Actions
Today, 04/10/2016 08:17	Simon Hayes [315385].pdf				More data required	Select Action...
Friday, 09/09/2016 09:47		Thursday, 03/03/2016	2267	£200.00	Awaiting approval	Select Action...
Thursday, 08/09/2016 14:03	R&R Kidbrooke Village inv 2703 [c6964].pdf	Thursday, 08/09/2016	2703	£900.00	Awaiting approval	Select Action...
Thursday, 08/09/2016 13:59	R & R Grosvenor Waterside inv 2702 [c6299].pdf	Thursday, 08/09/2016	2702	£1,200.00	Awaiting approval	Select Action...
Thursday, 08/09/2016 13:55	R&R The Heron Inv 2701 [c4943].pdf	Thursday, 08/09/2016	2701	£900.00	Awaiting approval	Select Action...
Wednesday, 07/09/2016 17:12	R & R Bow Quarter Inv 2697 [330965].pdf	Wednesday, 07/09/2016	2697	£85.48	Approved for payment	Select Action...

From the **Select Action...** menu, you can select **Edit Details** for the invoice and complete the fields. Or **View** the PDF if you need to recheck.

We also recommend that you check the **Display PDF File** check box.

This makes it very easy to view the invoice details along side the form.

Once you are happy with the invoice details click OK

If there are multiple invoices, you will see a **Next Invoice** button, you can click through the set of invoices until you have covered all that you need to enter.

This will automatically send all of the completed files over to the correct people for approval in the managing agent.

It's that simple!

Checking on Your Invoices

From the Invoice Menu you can also select Invoice List, this will list the most recent invoices but also has several search options to find both current and paid/historical invoices.

Invoices / Invoice List

ID of Request or Contract:	<input type="text"/>
Your reference number:	<input type="text"/>
Dwellant reference number:	<input type="text"/>
Status:	-- No selection yet -- <input type="button" value="v"/>
Invoice date range:	From <input type="text"/> To <input type="text"/> dd/MM/yyyy
In Dispute?:	<input type="checkbox"/>
<input type="button" value="Filter"/>	

Through the search filter you can search for many things

- Specific Work Order, or Contract invoices.
- By your own invoice number
- By Status to look at all Awaiting Approval invoices
- By date range (Based on invoice date)
- For all invoices currently in dispute

Contract Invoices

These are a real frustration for both you and your property management customers. Each time you send in a regular quarterly/monthly bill someone has to work out what this relates to whether it is an existing contract and then how to allocate it.

If you submit the invoice with the contract number such as [c2853], then all the information is already filled in for them and the invoice will run through the system like it is on greased rollers.

Invoices where you have no Work Order or Contract

On rare occasions the Property Manager will not have provided a Work Order or Contract. On occasion work may be discussed and agreed over the phone, or work will occur as an emergency -

we recommend that you always ask for a Work Order number, or Contract number to be sent to you after the event.

However if you have no Work Order or Contract Number you can upload and submit an invoice. You can click the upload Invoice without work order.

Work order or contract link:

I received the Work Order or Contract through Dwellant (the reference can be found in square brackets eg [123456])

I definitely DO NOT have a Dwellant Work Order or Contract for the job. This option will take longer to process.

Warning: By using this option, where you do have a Work Order or Contract number you will cause issues in processing your invoices. Additionally your invoices will take longer to process.

Your Organisation

Depending on the size of your company and how it is structured you may want to do everything yourself or different departments/teams that deal with invoices.

You can setup extra user accounts very easily, just go to Setup, User and click Add User – just fill in name and email address and make them an Administrator group member. Select to send them an invitation email to join.

Also on the Setup menu is User Groups and here you can add them to the Accounts group. By segregating these groups you can control who receives emails about these invoices.

Help and Support

We are more than happy to help you getting started, and will setup a phone call with you to run through these features.

If you have questions about this please call our customer support line on **020 3397 2243** or email customerservice@dwellant.com

Frequently Asked Questions

I don't have an account on the system. How do I get one? Speak to the administrator for your organisation, the person that is already receiving Work Orders – there is a section in this document that covers adding you.

When we email invoices it says – **“Your Account is unknown”** Speak to the administrator for your organisation – your sending email address needs to be added in order to send invoices, the person that is already receiving Work Orders – there is a section in this document that covers adding your account.

I don't have a 'Work Order number', how do I upload an invoice? Strictly speaking there should be a Work Order for every job you do, but there is still a way to upload an invoice that is not associated with a Work Order. After logging in there is the option to 'Upload invoice without Work Order', you'll find this link in a green box on your Home page. Once uploading is complete, you will be presented with a page where you can fill in the required details for the invoice.

My invoice won't upload! Always make sure that any invoices you upload are in (Text) PDF format and that the file size is no more than 8mb. If you are still experiencing problems please contact

Customer Service. Always export the invoice from the application that created it. Every package is capable of doing this. Never use a paper scanner – this will waste your time.

I have uploaded an invoice but when I annotate it the details are missing! Please make sure your PDF invoice is correctly named. If you upload an invoice in the 'Invoice file drop area' or from the Work Order itself the Work Order or Contract number must be included in the filename in square brackets. For example: *Invoice[235874].pdf* or *Invoice[c4567]*.

If you 'email-in' your invoice, the Work Order or Contract number [in square brackets] need only be included in the subject line of the email.

Do I have to log in to Dwellant every time I want to upload an invoice? Please see the section that tells you how to email your invoices directly [Email your Invoices](#) – you can email your invoices when ready, then periodically work through annotating them.

We send lots of invoices and we don't want to have to annotate them? Firstly the online invoicing should already have been saving you time over paper and postal options. Secondly annotating means you will get paid faster. But if you produce a significant number of invoices email customerservice@dwellant.com and they will talk to you about the options to have your invoices automatically annotated.