Welcome to FunctionFox! Questions or comments? Contact us at 1.866.369.8463 or email staycreative@functionfox.com. We are here to help!

FunctionFox Invoicing

The FunctionFox Invoicing feature is free, and can be added on to any account by request. Simply email us or give us a call and we will make it happen.

Invoicing gives you the ability to create and view Quotes and Invoices, as well as report on invoices within FunctionFox.

Create Quote

Using data pulled from both the Estimate and Project Costs page, you can generate a Project Quote. This can be sent off to a client for approval before the actual work begins. Before creating a Quote, make sure you have set up your Project Estimate (Projects > Estimate) and entered in any estimated Costs (Projects > Project Costs).

Go to Invoicing > Create Quote in the left menu to go to the Quote setup page. Here, select the Client that you are creating the Quote for from the To (Client) drop-down menu. Typically the default selection in the From drop-down menu will match your company name, although you can enter in other sources, as needed. Select the Project that you wish to create the Quote for, or click [+] to multi-select from the Project list. You have some options as far as what to Include, and what to Hide on the Quote. You can Include Project Costs (If you don’t want to include all Estimated Costs related to a project on this Quote, adjust the date range at the top of the page), the Project Scope, and whether or not to show the Estimated hours in Detail. You may also choose to Hide Rates, Quantity, and Subtotals, as needed.

Note: Once you generate the Quote or Invoice, there is no way to change what you’ve chosen to Include or Hide without going back and generating the Quote again.

You can also generate a Quote directly from the Estimates page by setting up your Project Estimate and then clicking the Create Quote button at the bottom of the page. Using the Create Quote page, however, gives you greater control over your Quote creation.

After clicking Submit, you have the opportunity to view your Quote before saving it. Click the icon to display the breakdown of Estimated hours. If you have chosen to hide either Rates or Quantity, that information will be visible but greyed-out on this page. You can still make edits to either of these amounts as needed.
Click the Add Fee link to enter in Estimated time or additional fees not included in your Project Estimate. This could be a flat fee, for example, that needs to be accounted for on the Quote. This page allows for in-line editing; simply click to edit the additional line item.

Click on the greyed-out Quantity column to enter in a quantity of at least 1, and then add your flat fee in the Rate column.

You may in-line edit or delete any line item on the Quote or Invoice. You may also edit the Project name, or Project Cost details, if applicable. The ability to edit Quotes and Invoices in this way gives you control over what the client sees. Editing information or removing information from the Quote or Invoice will not alter any actual data within the account. Note: If you delete a line item from a Quote or Invoice, the associated fee will be subtracted from the overall total.

Once you are happy with the way your Quote looks, and that everything is correct, click the Save link at the bottom right of the page.

**Create Invoice**

To create an Invoice for a Project based on actual time tracked, go to Invoicing > Create Invoice in the left menu, or use the Save As: Invoice link at the bottom of any Project Report.

First, select the date range for the work you wish to capture on the Invoice. If you are invoicing a completed Project in full, you will want this set to All Time. Next, select the Client you are invoicing, and the Project. You have the option of creating an Invoice for all projects under a Client, invoicing one specific Project, or multi-selecting Projects of your choice. Choose what you would like to Include or Hide, and apply any necessary Taxes.
After you click Submit, you will have the opportunity to review and edit your Invoice before saving. Just like on the Project Quote, you may add additional line items to the Invoice using the Add Fee link. When you're happy with your Invoice, click Save at the bottom right.

View Quotes/Invoices

When you save a Quote or an Invoice, you're taken to the View Invoices page (Invoicing > View Invoice). Depending on your selections in the fields at the top of the page, you can view all Invoices, all Quotes, or both. You may also choose to filter down on a specific Client or Stage.

The Menu link next to the saved Quotes and Invoices let you view details, make edits, view in HTML, and email it to yourself in PDF format.

With Quotes, you also have the option of creating an Invoice directly from an existing Quote. You may also Archive old Quotes and Invoices as needed.

To create custom Stages for both Quotes (Approved, Not Approved, On Hold, etc.) and Invoices (Paid, Unpaid, etc.), click on the Tips/Links box on the upper right-hand side of the page.

Invoicing Settings

To access additional settings for the Invoicing feature, go to Settings & Preferences, Account Preferences, Invoicing. Here, you can set up various tax percentages, and input text for both your Invoice and Quote footer (payment terms, GST number, etc.). To upload your company logo, click on the Logo tab at the top of the page.

Contacts

Go to Clients > Contacts in the left menu to manage your contacts within FunctionFox. This is where you can enter Client contact information, vendor information, supplier, etc.

To enter a new contact, fill in all the applicable fields, and click Save New. You can use the Manage link next to the Category drop-down menu to create custom categories (Clients, Vendors, Courier, Personal, etc.) to group your contacts. Click the Search button to display your full list of Contacts, or use any of the fields on the page to narrow down your Search (all Contacts included in the Vendor category, for example).

To link Contact information with a specific Client for invoicing purposes, pull up your Contact list and refer to the Client column on the far right. If N/A is listed, that Contact is not linked to a specific Client. This is fine for couriers and suppliers, but if you need to link this information to a Client, click within the column and choose the appropriate Client from the list.
Once Contact information has been linked to an existing FunctionFox Client, this contact information will appear in To (Client): drop-down menu on both the Create Invoice and Create Quote pages.

**Note:** You can link multiple Contacts to the same Client (different departments, for example). This way, you can generate Invoices for the appropriate Contact without having to manually adjust the address that appears on the Invoice.

### Invoice & Tax Report

The Invoice Report (**Invoicing > Invoice Report**) allows you to create a printable report of all your Quotes or Invoices currently in FunctionFox, while the Tax Report (**Invoicing > Tax Report**) provides you with information regarding the tax percentages applied to your invoices.