

Beyond - How to Manage Billing Setup

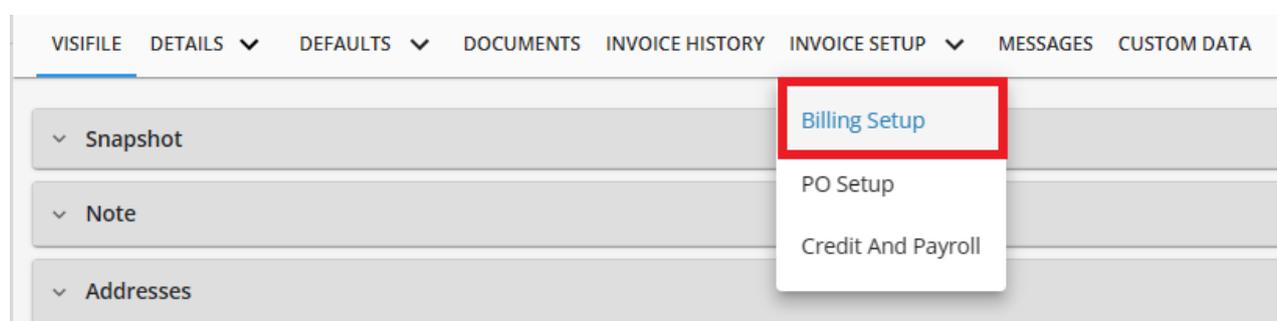
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How to Manage Billing Setup

When setting up billing on a customer record in Beyond there are a few questions one might ask themselves. How often is a customer invoiced? What do the invoices look like? Who are invoices sent to? Is this person mailed a physical copy of the invoice or do they receive it by email? All of these can be answered from the 'Billing Setup' expanded page on the customer record beside 'Invoice Setup' in Beyond.

This article will walk users through understanding the different cards located in the 'Billing Setup' expanded page.

Navigate to Customer > Invoice Setup > Billing Setup:



Cards

There are six distinct cards that make up the billing setup area on a customer record.

- [Actions](#)
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- [Invoice Recipients](#)
- [Billing Schedule](#)
- [Separate Invoices](#)
- [Invoice Line Items](#)

Actions

This card will display information regarding the relationship of the record to the invoicing it will receive. This is most relevant when working with customers that utilize departments, as it will control which record will receive invoicing for the record you are setting up.

For example, will this department be billed separately or will it apply it to it's parent customer record.

^ Actions
Invoice Setup
Invoice department separately
Parent Customer
123 Nursing - Primary

Note A primary record will never be able to apply its billing to another record as it is the parent of all its departments records.

Invoicing

^ Invoicing	
Style	Invoice Method
Invoice S Type	Print and Email with Timecard Image
Email Template	
Invoice to Contact	

Style: The general invoice design that the customer will be receiving. Each TempWorks client has a unique invoice style drop-down containing specific invoice designs.

If you are using our generic style types:

- **Invoice S Type:** (Single Pass) Will have everything for one transaction in one line

INVOICE

Accounts Payable
Sargento
PO BOX 999
SAINT PAUL, MN 55130

Invoice Date **Invoice #**
11/15/2022 1569749

Customer # **Invoice Amt**
4295036436 \$1,466.02

PO Number
PLANTA123

Terms: Net 45 Days From Date Of Invoice

Employee	Description	Reg Hrs	Rate	OT Hrs	OT Rate	Total
Domingo-Sunday, Leonides	WeekendDate: 11/13/2022 Picker/Packer Department Name: Packaging Supervisor: Cena, John	40.00	\$30.00	3.00	\$45.00	\$1,335.00
Domingo-Sunday, Leonides	Park Reimb - Department Name: Packaging Supervisor: Cena, John	0.00	\$0.00	0.00	\$0.00	\$24.00
	City of Saint Paul - MN Sales Tax - Goods on Taxable Amount: \$24.00	0.00	\$0.00	0.00	\$0.00	\$1.89
	City of Saint Paul - MN Sales Tax on Taxable Amount: \$1335.00	0.00	\$0.00	0.00	\$0.00	\$105.13

Please Pay **\$1,466.02**

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- **Invoice T Type:** (Triple Pass) Will separate out Regular, OT, and DT on separate lines

VISIFILE DETAILS ▾ DEFAULTS ▾ DOCUMENTS INVOICE HISTORY INVOICE SETUP ▾ MESSAGES CUSTOM DATA

Actions

Invoicing

Style Invoice S Type Invoice Method Print and Email with Timecard Image

Email Template Invoice to Contact

VISIFILE DETAILS ▾ DEFAULTS ▾ DOCUMENTS INVOICE HISTORY INVOICE SETUP ▾ MESSAGES CUSTOM DATA TEST REPORT

Start Date _____ End Date _____ Invoice # _____

▼ MORE FILTERS RESET SEARCH

View Master View

147 results

ID	Invoice Number	Invoice Date ↓	Due Date	Invoice Amount	Amount Paid	Invoice Balance	Recent Payment	Branch	Cost Center	Posted
34759	1572805	1/17/2025	2/6/2025	4,498.43	0.00	4,498.43		St. Cloud		✓
34694	1572663.1	12/30/2024	1/19/2025	313.91	941.73	-627.82	1/16/2025	St. Cloud		✓
34616	1572690	12/13/2024	1/2/2025	5,100.30	5,100.30	0.00	12/30/2024	St. Cloud		✓
34615	1572689	12/13/2024	1/2/2025	439.49	0.00	439.49		St. Cloud		✓
34573	1572663	12/5/2024	12/25/2024	418.56	-313.91	732.47		St. Cloud		✓
32780	1572111	3/14/2024	4/3/2024	700.26	0.00	700.26		St. Cloud		✓

3140 Neil Armstrong Blvd #205

INVOICE

123 Nursing
j
h, MN 55121

Invoice Date 7/14/2020 Invoice # 440
Customer # 778658 Invoice Amt \$800.00
PO Number 12983

Terms: Payment Past Due 20 Days After Invoice Date:

Employee	Description	Reg Hrs	Rate	OT Hrs	OT Rate	Total
zzCalifornia San Francisco, zzCalifornia San Franc	WeekendDate: 6/14/2020 Unknown Department Name: Primary	40.00	\$20.00	0.00	\$30.00	\$800.00

Please Pay \$800.00

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If the customer record has an invoice style selected that is not able to be previewed, the invoices within the "Invoice History" will not be able to be previewed.

Invoice Method: Determines how the customer will be receiving the invoice.

Note When a method is selected that includes emailing the invoice, users will be prompted and required to add an invoice recipient. This can be added to the 'Invoice Recipients' card. Once one is added you may change the invoice method to one that includes email.

Invoicing

Style
Invoice S Type

Invoice Method
Print and Email

Email Template
Invoice to Contact

SAVE AS DRAFT CANCEL SUBMIT

Email Template: If/when an email invoice method is selected, the email template determines what will be included in the body of the email on a recurring basis.

Invoice Recipients

^ Invoice Recipients

=	George Anderson (Manager) g.anderson@xip.xom	
=	Mia Smith (Owner) mia.smith@ininn.xom	

To add an invoice recipient, select the button.

This will open a wizard where you can add invoice recipients from a list of contacts on the customer record:

Note This drop-down will only include all active contacts that belong to the customer you are currently viewing.

Invoice Recipient

* Contact * Method Type

Old Ed Method Type is required.

Attach PDF
At least one of these fields is required: (Attach PDF, Attach XLS)

Attach XLS
At least one of these fields is required: (Attach PDF, Attach XLS)

One invoice per email
Limiting to one separate email raises the potential of activating Junk Mail filters.

SAVE AS DRAFT CANCEL SUBMIT

Once selected, decide which email address the invoice will be sent to in the "Method Type" drop-down:

Invoice Recipient

* Contact * Method Type

Old Ed Method Type is required.

Select attachment type(s):

Attach PDF
At least one of these fields is required: (Attach PDF, Attach XLS)

Attach XLS
At least one of these fields is required: (Attach PDF, Attach XLS)

One invoice per email
Limiting to one separate email raises the potential of activating Junk Mail filters.

CONTACT METHOD	CONTACT METHOD TYPE
olded@sodashoppe.xom	Email

SAVE AS DRAFT CANCEL SUBMIT

Next, select the appropriate attachment type that will be included within the invoice email:

Invoice Recipient

* Contact * Method Type

Old Ed olded@sodashoppe.xom

Select attachment type(s):

Attach PDF
At least one of these fields is required: (Attach PDF, Attach XLS)

Attach XLS
At least one of these fields is required: (Attach PDF, Attach XLS)

One invoice per email
Limiting to one separate email raises the potential of activating Junk Mail filters.

SAVE AS DRAFT CANCEL SUBMIT

Select whether each invoice will be sent out with individual emails or if all invoices will be attached to a single email via the "One invoice per email" checkbox:

Invoice Recipient

* Contact: Old Ed
 * Method Type: olded@sodashoppe.com

Select attachment type(s):

Attach PDF

Attach XLS

One invoice per email
 Limiting to one separate email raises the potential of activating Junk Mail filters.

SAVE AS DRAFT CANCEL SUBMIT

Select "Submit" to complete the setup of the invoice recipient.

Note Once the setup is complete, you have the option to either "Edit" or "Delete" the invoice recipient after selecting the  to the right:



Billing Schedule

This card shows billing frequency (weekly, biweekly, or monthly) and any additional invoice notes. If users select biweekly or monthly, they will be asked to specify at what point in the cycle the invoice should be created.

Billing Schedule

Billing Frequency: Monthly
 Bill On...: Process during week cycle 4

Invoice Notes: --

Select the  icon in the upper right to edit the options.

Note Selecting a billing frequency of monthly will prompt for which week of the month the invoice should be sent. If the invoice should be sent at the end of the month, ignore billing cycle should be selected since there are sometimes 4 weeks, sometimes 5 weeks in a month.

Separate Invoices

This card displays/controls if there is an instance where a separate invoice should be created for a customer.

Separate Invoices By	
Assignment No	Branch No
Cost Center No	Department No
Division No	Employee No
Job Order No	Job Title No
Pay Code No	Purchase Order No
Shift No	Sub Entity No
Supervisor Yes	Weekend Date No
Worksite Yes	

By editing this card, you may simply note how the invoices should be divided by selecting the check box(s) beside each category.

For example, in the image below, we've selected to have the invoices separated by supervisor and worksite, every time the customer is invoiced for a different supervisor and/or worksite they will receive a separate invoice:

Separate Invoices By

<input type="checkbox"/> Assignment	<input type="checkbox"/> Branch	<input type="checkbox"/> Cost Center
<input type="checkbox"/> Department	<input type="checkbox"/> Division	<input type="checkbox"/> Employee
<input type="checkbox"/> Job Order	<input type="checkbox"/> Job Title	<input type="checkbox"/> Pay Code
<input type="checkbox"/> Purchase Order	<input type="checkbox"/> Shift	<input type="checkbox"/> Sub Entity
<input checked="" type="checkbox"/> Supervisor	<input type="checkbox"/> Weekend Date	<input checked="" type="checkbox"/> Worksite

SAVE AS DRAFT CANCEL [SUBMIT](#)

With this in mind, consider the following...

Let's say we are billing for the company "Real Steel" and they have two different supervisors for their orders. Each of those supervisors are in charge of assignments for their two worksites. How many invoices will this customer receive? The correct answer is four, one for each worksite and supervisor combination. If we were only creating separate invoices for each worksite, we would have two invoices.

- **Assignment** - Selecting assignment will create a different invoice for each assignment created for that customer.
- **Department** - Selecting department will separate invoices for each department of the customer we are tracking.
- **Job Order** - Selecting order will create a different invoice for each order called in.
- **Purchase Order** - Selecting PO will create a different invoice number for each PO number used.
- **Supervisor** - Selecting supervisor will give you a different invoice per supervisor identified on the order of

each assignment.

- **Branch** - Branch refers to the number of branches (or offices) your staffing company has. Please consult your administrator for any questions regarding your branches.
- **Division** - The division refers to the type of job. For example, clerical vs. industrial vs. health care vs. hospitality. Please consult your administrator for any questions regarding the divisions of your job titles as these are managed by your company.
- **Job Title** - Selecting job title will create a different invoice for each job title filled.
- **Shift** - Selecting shift will create a different invoice for each shift among orders in the customer record.
- **Weekend Date** - Selecting week end will produce a different invoice for each different week ending being billed (late timecards).
- **Cost Center** - Separate by different cost center codes (if your company uses cost center).
- **Employee** - Selecting employee id will create a different invoice for each employee assigned to the customer.
- **Sub-entity** - If your company is using sub-entity codes, selecting this option will give you a different invoice per sub-entity code used.
- **Worksite** - Worksite refers to the different physical locations you would be sending people to work.

Note Here is an example of the difference between separating by Assignment vs. Employee ID:

We send Joe to ABC Company on Monday, he does a great job, but his job ends on Monday. ABC Company asks for Joe to come back to a different job on Thursday.

If you are separating by Assignment, you will have two invoices. If you separate by Employee ID, you will have one invoice with both jobs billed on that one invoice.

Invoice Line Items

Adding an invoice line item will include the type selected with each listing on the invoice.

For example, if you had selected PO Number the PO Number would also be included with the employee's name, job title, hours worked, etc., per transaction listed.



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