Creating & Scheduling Invoices

Creating or scheduling an invoice can be performed in both Gimme Field and Gimme VMS. This allows the drivers, as well as administrative staff, flexibility in creating invoices for pre-sales or off-the-truck deliveries.

Creating Deliveries and Invoices:

Gimme VMS: From the default **Operations** page you will see the scheduled visits for the day

Gimme Field: From the **Schedule** page you will see all of your scheduled visits for the day

Creating an **Invoice**

1. This process creates a visit and an Invoice immediately, for the day you create it. It also immediately emails the invoice to the customer email on file.
2. Tap/Click the red, **three-dot menu button** located at the top right corner of your screen
3. From the drop-down menu, select **Create Invoice**
   a. Click/Tap **+ Add** to select the route
   b. Click/Tap **+ Add** to select the POS
   c. Click/Tap **+ Add** Items where you will choose between:
      i. **Last Order**: pulls the most recent order filled
      ii. **Standing Order**: pulls in the order saved at the POS level
      iii. **Blank**: pulls a blank order for you to build
         1. After you choose, you will be brought to the **Order Builder** page where you can **edit the quantity and price of items added**, as well as type in notes that will appear in the notes section of the Invoice
         2. Tap/Click **+ Add** to add items to the invoice
            a. Give the item an amount and price
            b. When you have finished, tap "Done" at the bottom of the menu
            c. For additional items, tap **+ Add** for each item and repeat the previous steps
         3. You will see the item you have added appear in the order you are building (*Note you can edit the item at any time by tapping on it and editing the amount and price.*)
         4. To remove an item simply click and drag left on the item to reveal the delete button
      iv. When you have finished building your order, tap **Create** in the upper right corner of the menu. This will automatically do two things:
         1. Create a visit on the Operations page
         2. Send an email of the invoice to the customer (if their email address is on file)

[Video: How to create an invoice in Gimme VMS]

Schedule Deliveries

1. From the **Operations** page, click/tap on the **red circle with three dots** located at the top right corner of your screen then click/tap **Schedule Delivery**
2. Select the date that the delivery will be completed (*Note you can select the current date to add to that day's schedule*)
3. Under **Route**: click/tap **+ Add** to choose a route
4. Under **POS**: click/tap **+ Add** to select a POS
5. Click/Tap **+ Add** Items and choose
   a. **Last Order**: pulls the most recent order filled
   b. **Standing Order**: pulls in the order saved at the POS level
   c. **Blank**: pulls a blank order for you to build
      i. After you choose, you will be brought to the **Order Builder** page where you can **edit the quantity and price of items added**, as well as type in notes that will appear in the notes section of the Invoice
      ii. Tap/Click **+ Add** to add items to the invoice
         1. Give the item an amount and price
         2. When you have finished, tap "Done" at the bottom of the menu
         3. For additional items, tap **+ Add** for each item and repeat the previous steps
      iii. You will see the item you have added appear in the order you are building (*Note you can edit the item at any time by tapping on it and editing the amount and price.*)
      iv. To remove an item simply click and drag left on the item to reveal the delete button
         1. Once you have added all items, select **Create** in the upper right corner. The visit will be scheduled for the date selected and can be run as normal

To **edit a Scheduled Delivery** follow the steps to *schedule a delivery*: select the route, POS, and date for a previously created delivery

1. Here scheduled deliveries will appear and you can edit the items, quantities, and prices
2. Tap **Update** and the already scheduled delivery will be updated

[Video: Creating and Scheduling Invoices]