PBG Invoice System Info Collection Template

Date: _____ Your Name: _____ PBG Contact Name/Title: _____

1. Word Invoice Template

File name: _____

File location/path: _____

Template type: ■ .docx ■ .dotx ■ Other _____

Used for: ■ Printing invoices ■ Emailing clients ■ Recordkeeping

Questions to ask:

- Is this the blank master invoice template?

- Is there an automated process (like a mail merge or macro) that fills it?

- Who edits or updates the template?

Notes:

_____

_____

2. Data Source (Customer / Invoice Data)

Where does invoice info come from?

■ Access database ■ Excel spreadsheet ■ Another system ■ Entered manually

File name or database name: _____

Path or location: _____

Key fields used: (e.g., CustomerName, Amount, InvoiceID)

_____

Notes:

_____

_____

3. Macros / Mail Merge / Automation

Do they use Mail Merge or a VBA macro in Word? ■ Yes ■ No ■ Unsure

If yes, macro name(s): _____

_____

Notes:

_____

_____