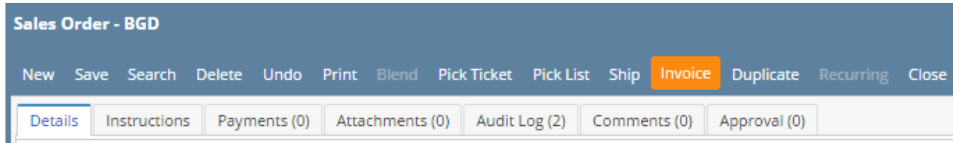


How to Process Sales Order to Invoice

Use Sales Order | Invoice button

1. Open the Sales Order record that you want to process to Invoice. If the sales order is not yet created, refer to [How to Create Standard Sales Order](#)
2. Click the **Invoice** button. This is button if disabled if one of the line items is lot tracked.



This button will process to Invoice the following items.

- a. All non-inventory, software, other charge, and service item type, and miscellaneous items.
- b. All not shipped inventory items that are non-lot track.
- c. All shipped inventory items (with lot or non-lot) wherein its Inventory Shipment transaction is already posted.



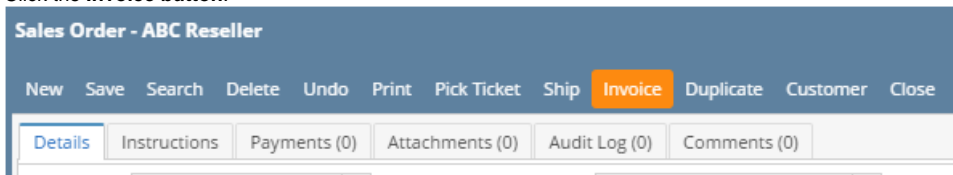
You are not allowed to process lot tracked items directly to Invoice. Reason for this is Sales Order and Invoice does not give you the option to assign lot numbers to items. In order to assign lot numbers to these items, you will have to [process it to Inventory Shipment](#).

Use Add Shipment screen

Refer to [How Add Shipment Works](#)

Use Sales Order | Invoice button

1. Open the Sales Order record that you want to process to Invoice. If the sales order is not yet created, refer to [How to Create Standard Sales Order](#)
2. Click the **Invoice** button.



This button will process to Invoice the following items.

- a. All non-inventory, software, other charge, and service item type, and miscellaneous items.
- b. All not shipped inventory items that are non-lot.
- c. All shipped inventory items (with lot or non-lot) wherein its Inventory Shipment transaction is already posted.



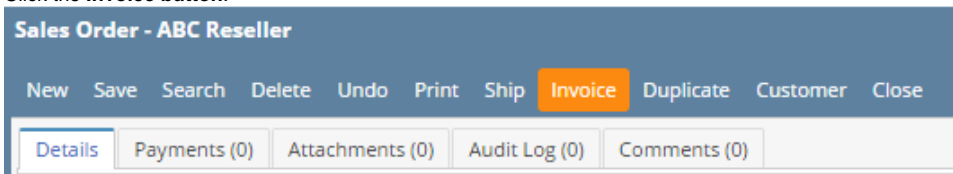
You are not allowed to process lotted items directly to Invoice. Reason for this is Invoice does not give you the option to assign lot numbers to lotted items. In order to assign lot numbers to these items, you will have to [process it to Inventory Shipment](#).

Use Add Shipment screen

Refer to [How Add Shipment Works](#)

Use Sales Order | Invoice button

1. Open the Sales Order record that you want to process to Invoice. If the sales order is not yet created, refer to [How to Create Standard Sales Order](#)
2. Click the **Invoice** button.



This button will process to Invoice the following items.

- a. All non-inventory, software, other charge, and service item type, and miscellaneous items.
- b. All not shipped inventory items that are non-lot.
- c. All shipped inventory items (with lot or non-lot) wherein its Inventory Shipment transaction is already posted.



You are not allowed to process lotted items directly to Invoice. Reason for this is Invoice does not give you the option to assign lot numbers to lotted items. In order to assign lot numbers to these items, you will have to [process it to Inventory Shipment](#).

Use Add Shipment screen

Refer to [How Add Shipment Works](#)

1. Create a Sales Order with grid details consisting of item type equal to Service, Other Charge, Software, and Non-Inventory. Refer to [How to Create Standard Sales Order](#).

Sales Order - ABC Reseller

Details Attachments Audit Log

Type: Standard Recurring: ☐ Bill To: ABC Reseller Ordered By: irelyadmin Order No: SO-6

Customer: 0001005066 Ship To: ABC Reseller PO Number: Salesperson: Status: Open

Date: 01/21/2016 Due: 01/21/20 Ship Via: BOL No: Split: Currency: USD

Location: 0001 - Fort Wayne Terms: Due on Receipt Freight Term: Comments:

Insert View Remove Get Previous Details Layout Filter Records (F3)

Item No	Contract...	Contract...	Description	UOM	Shipped	Ordered	Discoun...	Tax	Price	Total	Tax Group
+			TNKRENT	Each	0.00	1.00	0.00	0.00	46.160000	46.16	
+			additional charge		0.00	1.00	0.00	0.00	18.000000	18.00	
+					0.00	0.00	0.00	0.00	0.000000	0.00	

Bill To: ABC Reseller Somewhere St. Fortville, IN 46040 United States

Ship To: ABC Reseller Somewhere St. Fortville, IN 46040 United States

Item: On Hand: On Order (PO): Back Order:

Subtotal: 64.16

Shipping: 0.00

Tax: 0.00

Total: 64.16

Ready Page 1 of 1

2. Save and close the Sales Order.
3. Go to **Sales folder | Invoices menu**. Click the **New button** on the grid search.
4. On Invoice screen, select the same **Customer** used on the Sales Order. At this point, the **Add Inventory Shipment screen** will be displayed.

The Add Inventory Shipment screen will display the following customer transactions:

- a. Inventory Shipment that has already been shipped/posted.
 - b. Open Sales Order for item types Software, Other Charge, Service, and Non-Inventory.
 - c. Open Sales Order for miscellaneous items.
5. Select the transactions that will be invoiced, then click the **Add button**.

Add Shipment

Customer ID: 0001005066 Company Location: 0001 - Fort Wayne

Layout Filter Records (F3)

Location	SO Number	Shipment Number	Scale Ticket No	Date	Item No	Description	Ordered	S
0001 - Fort Way...	SO-3			01/20/2016	TNKRENT	Tank Rent	1.00	
0001 - Fort Way...	SO-6			01/21/2016	TNKRENT	Tank Rent	1.00	
0001 - Fort Way...	SO-4			01/21/2016		sample misc item	5.00	
0001 - Fort Way...	SO-5			01/21/2016		sample misc item	5.00	
0001 - Fort Way...	SO-6			01/21/2016		additional charge	1.00	

Ready

The selected items will be added to the Invoice.

Invoice - ABC Reseller

Details Attachments Audit Log

Type: Standard Recurring: ☐ Bill To: ABC Reseller Freight Term: Invoice No:
 Customer: 0001005066 Ship To: ABC Reseller Deliver/Pickup: PO Number: BOL Number:
 Invoice Date: 01/21/20 Post: 01/21/201 Ship Via: Due Date: 01/21/2016 Salesperson: Currency: USD
 Location: 0001 - Fort Wayne Terms: Due on Receipt Ship Date: 01/21/2016 Comments:

Insert View Remove Get Previous Details Layout Filter Records (F3)

Item No	Contract...	Contract...	Description	UOM	Ordered	Shipped	Discount	Tax	Price	Total	Tax Group
TNKRENT			Tank Rent	Each	1.00	1.00	0.00	0.00	46.160000	46.16	
			additional charge		1.00	1.00	0.00	0.00	18.000000	18.00	
					0.00	0.00	0.00	0.00	0.000000	0.00	

Bill To: ABC Reseller Somewhere St. Fortville, IN 46040 United Item: TNKRENT - Tank Rent Subtotal: 64.16
 Ship To: ABC Reseller Somewhere St. Fortville, IN 46040 United On Hand: 0.00 On Order (PO): 0.00 Shipping: 0.00
 Committed: 0.00 Back Order: 0.00 Tax: 0.00 Total: 64.16

Edited Page 1 of 1

6. Enter the **Shipped** quantity for each item, if needed.
7. **Save** or **Post** the transaction.

1. Create a Sales Order with grid details consisting of item type equal to Service, Other Charge, Software, and Non-Inventory. Refer to [How to Create Standard Sales Order](#).

Sales Order - Home Dealers

Details Attachments

Customer: HOMEDEALER Location: 1000-Location A Date: 06/30/2015 Currency: USD BOL No: Order Status: Open Order No: SO-3
 Bill To: US Ship To: US Salesperson: JAS PO Number:
 US 18 Central St. Edison, OH, 43320 Ship Via: UPS Ground Terms: Due 28th of the Month
 Comments: Sample processed to Invoice. Ordered By: AGADMIN Due Date: 07/28/2015
 Freight Terms: Split:

Insert View Remove Layout Filter Records (F3)

Item No	Description	UOM	Ordered	Shipped	Discoun...	Tax	Price	Total
Other Charge	other charge	Hour	2.00	0.00	0.00	0.00	21.55	43.10
Installation	service type	Day	1.00	0.00	0.00	0.00	6.11	6.11
			0.00	0.00	0.00	0.00	0.00	0.00

Item: Subtotal: 49.210000
 On Hand: On Order (PO): Shipping: 0.000000
 Committed: Back Order: Tax: 0.000000 Total: 49.210000

Ready Page 1 of 1

2. Save and close the Sales Order.
3. Go to **Sales folder | Invoices menu**. Click the **New** button on the grid search.
4. On Invoice screen, select the same **Customer** used on the Sales Order. At this point, the **Add Inventory Shipment** screen will be displayed.

Add Inventory Shipment

Add Close

Customer: HOMEDEALER Company: Home Dealers

Layout Filter Records (F3)

SO Number	Date	Item No	Description	Ordered	Shipped	Remaining	Ship Via	Terms
SO-1		Other Charge	other charge	2.00	0.00	2.00		Due 28th of the...
SO-2		Other Charge	other charge	2.00	0.00	2.00		Due 28th of the...
SO-3		Other Charge	other charge	2.00	0.00	2.00		Due 28th of the...
SO-3		Installation	service type	1.00	0.00	1.00		Due 28th of the...

Ready

The Add Inventory Shipment screen will display the following customer transactions:

- a. Inventory Shipment that has already been shipped.
 - b. Open Sales Order for item types Software, Other Charge, Service, and Non-Inventory.
 - c. Open Sales Order for miscellaneous items.
5. Select the transactions that will be invoiced, then click the **Add** button.

SO Number	Date	Item No	Description	Ordered	Shipped	Remaining	Ship Via	Terms
SO-1		Other Charge	other charge	2.00	0.00	2.00		Due 28th of the...
SO-2		Other Charge	other charge	2.00	0.00	2.00		Due 28th of the...
SO-3		Other Charge	other charge	2.00	0.00	2.00		Due 28th of the...
SO-3		Installation	service type	1.00	0.00	1.00		Due 28th of the...

The selected items will be added to the Invoice.

Item No	Description	UOM	Ordered	Shipped	Discount	Tax	Price	Total
Installation	service type	Day	1.00	0.00	0.00	0.00	6.11	0.00
Other Charge	other charge	Hour	2.00	0.00	0.00	0.00	21.55	0.00
			0.00	0.00	0.00	0.00	0.00	0.00

6. Enter the **Shipped** quantity for each item.
7. **Save** or **Post** the transaction.

1. Open the Sales Order record to be processed to Invoice. If you have not created the order yet, refer to [How to Create Standard Sales Order](#).
2. Click the **Process** toolbar button. If the Sales Order record is not yet saved, it will be saved automatically.

The Sales Order will be closed and the new Invoice will be displayed. Below is a sample Sales Order and its Invoice after the process.