How to Create Standard Invoice

The following are the steps in creating and posting an Invoice.

- Open the Sales | Invoices menu. If there is no existing record yet, this will open a new Invoice screen. If not, click the New button to open a new Invoice screen.
 - You will notice that some of the fields, like the Source, Type, Invoice Date, Post Date, Location, Ship Date, Account, Deliver/Pickup, Currency, and Accrual are already populated by default.
- 2. Fill out the header details as needed. The required details are Customer, Location, Bill To, Ship To, Terms, and Currency.
 - a. Set the Source to Standard.
 - b. Set the Type to Invoice.
 - c. Select a Customer.
 - d. Select a different Location, Bill To, Ship To, Terms, and Currency if needed. But don't leave these fields blank.
 - e. Enter other details that you see necessary. Refer to Invoice | Field Description | Header Details to help you in filling out the fields.
- Add details on grid. Refer to Invoice | Field Description | Grid Details to help you in filling out the fields. Note that UOM is a required detail.
 Complete filling in the Item No, Shipped, UOM, Price and other fields necessary to ensure they are appropriate for the customer's invoice.



The grid will also allow you to enter **miscellaneous items** that do not have an Inventory Item record. You can do this by not selecting an Item No and simply entering its Description, Shipped and Price, and other necessary details.

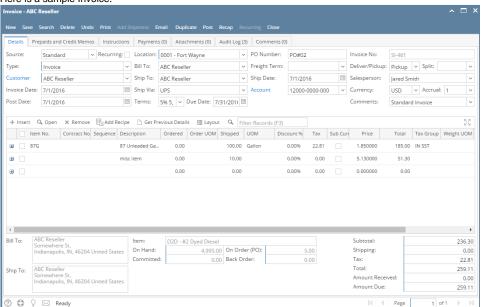


4. Click Save button. Notice that the Invoice No field will be filled in with a unique and system generated number.

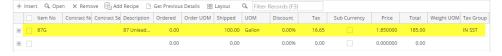
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You can skip saving the record if the transaction is to be posted right away since it will be saved automatically.

Here is a sample Invoice.



- 1. Open the Sales | Invoices menu. If there is no existing record yet, this will open a new Invoice screen. If not, click the New button to open a new Invoice screen
 - You will notice that some of the fields, like the Type, Location, Invoice Date, Due, Ship Date, and Currency are already populated by default.
- 2. Fill out the header details as needed. Refer to Invoice | Field Description | Header Details to help you in filling out the fields. Note that the required details are Customer, Location, Bill To, Ship To, Terms, and Currency
- Add details on grid. Refer to Invoice | Field Description | Grid Details to help you in filling out the fields. Note that UOM is a required detail.
 Complete filling in the Item No, Shipped, UOM, Price and other fields necessary to ensure they are appropriate for the customer's invoice.



The grid will also allow you to enter **miscellaneous items** that do not have an Inventory Item record. You can do this by not selecting an Item No and simply entering its Description, Shipped and Price, and other necessary details..



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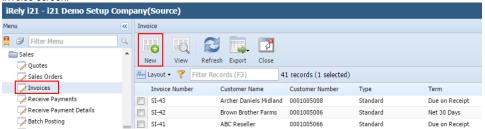


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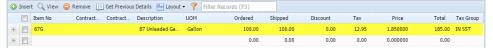
Here is a sample Invoice. Instructions Payments (0) Attachments (0) Audit Log (7) Comments (0) ∨ Recurring: Bill To: ABC Reseller Type: Standard ∨ Freight Term: Deliver ✓ Invoice No: SI-199 Split: ∨ Deliver/Pickup: ABC Reseller ∨ Ship To: ABC Reseller ∨ PO Number: PO#02 BOL Number: nvoice Date: 04/21/2016 Post: 04/21/2016 Ship Via: UPS ∨ Due Date: 05/21/2016 ☐ Salesperson: Jared Smith ∨ Currency: USD ∨
 Location:
 0001 - Fort Wayne
 ✓
 Terms:
 5% 5, Net 30
 ✓
 Accrual:
 1
 ✓
 Ship Date:
 04/21/2016 Comments: Sample Standard Invoice. + Insert Q Open X Remove Add Recipe 🕒 Get Previous Details 🐰 Layout Q Filter Records (F3) Item No Contract No Contract Se Description Ordered Order UOM Shipped UOM Discount Tax Sub Currency Price Total Weight UOM Tax Group 87 Unlead... 0.00 100.00 Gallon 0.00% 16.65 1.850000 185.00 + 10.00 0.00 0.00 0.00% 0.00 0.000000 0.00 Bill To: △ Item: nere St. polis, IN, 46204 United V On Hand: 4,995.00 On Order (PO): Shipping: 0.00 Total: 252.95

 Open the Sales | Invoice menu. If there is no existing record yet, this will open a new Invoice screen. If not, click the New button to open a new Invoice screen.

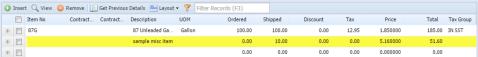


You will notice that some of the fields, like the Type, Location, Invoice Date, Due, Ship Date, and Currency are already populated by default.

- 2. Fill out the header details as needed. Refer to Invoice | Field Description | Header Details to help you in filling out the fields. Note that the required details are Customer, Location, Bill To, Ship To, Terms, and Currency
- 3. Add details on grid. Refer to Invoice | Field Description | Grid Details to help you in filling out the fields. Note that UOM is a required detail. Complete filling in the Item No, UOM, Shipped, Price and other fields necessary to ensure they are appropriate for the customer's credit memo.



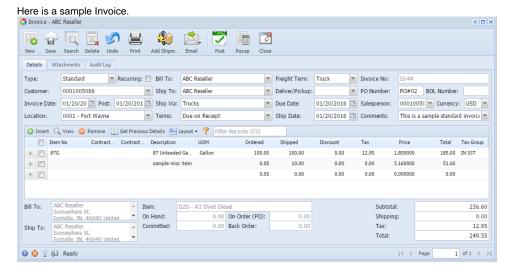
The grid will also allow you to enter **miscellaneous items** that do not have an Inventory Item record. You can do this by not selecting an Item No and simply entering its Description, Shipped and Price, and other necessary details..



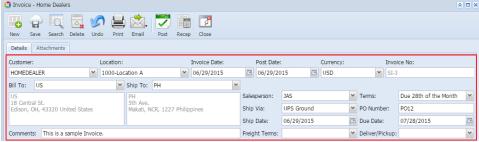
4. Click Save button. Notice that the Invoice No field will be filled in with a unique and system generated number.



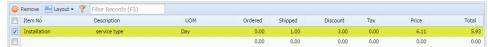
You can skip saving the record if the transaction is to be posted right away since it will be saved automatically.



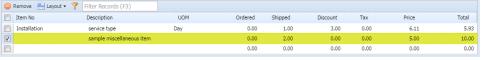
- 1. Open the Sales | Invoices menu. If there is no existing record yet, this will open a new Invoice screen.
- If there are existing records, click the New toolbar button on the search grid to open a new screen. You will notice that some of the fields, like the Location, Invoice Date, Post Date, Currency, and Ship Date, are already populated by default.
- 3. Enter the header details. Refer to Invoice | Field Description | Header Details to help you in filling out the fields.



4. Enter the grid details. Complete filling in the Location, Item No, UOM, Shipped, and other fields necessary to ensure they are appropriate for the customer's invoice.



The grid will also allow you to enter miscellaneous items that do not have an Inventory Item record. You can do this by not selecting an Item No and simply entering its Description, Shipped, and Price. Refer to Invoice | Field Description | Grid Details to help you in filling out the fields.

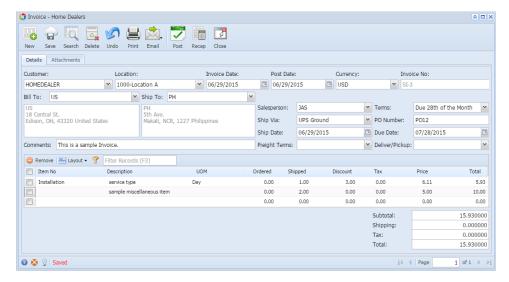


5. Click Save button. Notice that the Invoice Number field will be filled in with a unique and a system generated number. The Customer, Location, Bill To, Ship To, and Terms are the required details in saving an Invoice.



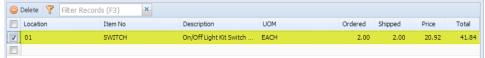
You can skip saving the record if the transaction is to be posted right away since it will be saved automatically.

Here is a sample Invoice.

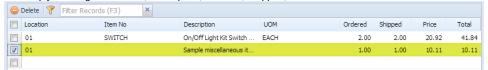


The following are the steps in creating and posting an Invoice.

- 1. Open the Accounts Receivable > Activities > Invoice menu. If there is no existing record yet, this will open a new Invoice screen and then proceed to step 3. If there are existing record, this will open the Search Invoice. If the search screen is displayed, proceed to step 2.
- If the Search screen is displayed, click the New toolbar button to open a new screen. You will notice that some of the fields, like the Invoice Type, Location, Invoice Date, Post Date, Currency, and Ship Date, are already populated by default.
- 3. Enter the header details. A list of the **Details tab > Header fields** is listed on **Invoice**.
- 4. Enter the grid details. Complete filling in the Location, Item No, UOM, Ordered, Shipped, and other fields necessary to ensure they are appropriate for the customer's invoice. Note that before selecting an Item No, you need to select a **Location** to filter the items per location.



The grid will also allow you to enter miscellaneous items that do not have an Inventory Item record. You can do this by not selecting an Item No and simply entering its Location, Description, Ordered, Shipped, and Price. A list of the **Details tab > Grid Details** is listed on Invoice.



5. Click Save button. Notice that the Invoice Number field will be filled in with a unique and a system generated number.



You can skip saving the record if the transaction is to be posted right away since it will be saved automatically.

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