



Multi-Shipment Invoices Script

Clip Link: http://www.priority-software.com/eshbel.com/Movie_Search/Multi-shipment_clip.htm

Note: Yellow highlights indicate action instructions.

Introduction

Hi, I'm _____ from Priority Software.

In this clip I'll demonstrate how to record a multi-shipment invoice in **Priority**.

Recording a Multi-Shipment Invoice (0:08-1:47)

A multi-shipment invoice bills the customer for shipped goods but it does not generate an inventory transaction. This type of invoice is used when you want to bill the customer independently of shipping documents, such as when you are invoicing multiple shipments together. You can also use this type of invoice to bill for service contracts, service calls and project-related expenses.

If you want to record a single invoice, or a few invoices, you can record them manually. To record a large number of invoices automatically, you can run a special program. First I'll demonstrate how to prepare an invoice manually.

From the **Financials > Accounts Receivable > Customer Invoices** menu, open the **Multi-Shipment Invoices** form. **Record the name** of the customer that is to be billed in the invoice. Today's date is filled in automatically, as well as the contact defined as the customer's invoice contact. The invoice will be assigned a temporary invoice number indicated by the prefix **T**.

Let's move to the References tab. You can link the invoice to different documents in the **Document** column. First choose the **Document Code**, for example, **Customer Shipments**. All the customer's shipping documents that have been finalized but not yet billed will now appear in the **Document** column. **Select the desired document**. Note that if a sales order was linked to the shipping document, it will appear automatically in the **Order** column. If you want to base the invoice on several documents, **move to the Documents for Invoice** sub-level form and choose the **Document Code** or just choose the desired document from the **Document** column. In this tutorial I'll base the invoice on one shipping document. **Now let's return to the upper-level form.**

Defining the Invoice (1:48-2:51)

The **Sales Rep** defined for the customer is filled in automatically, but may be revised.

In the **Site** column, you can **choose the customer site** to which to send the invoice. Its address then appears in the **Shipping Address** sub-level form.

In the **Customer's Purch Ord** column you can record the number of the customer's original purchase order.

In the **Financial Terms** tab, you'll see that the **Tax Code** is automatically filled in with the customer's defined code, but may be revised. If no payment terms were defined for the customer in the **Customers** form, or to revise the payment terms for a specific invoice, move to the **Invoice – Add'l Details** sub-level form and record the payment terms there. Alternatively, if the customer will be paying in several installments, you can define these payments in the **Payment Installments** sub-level form.

In the **Invoice/Memo – Remarks** sub-level form, any text that was defined for multi-shipment invoices in the **Financial Documents** form will appear. These remarks can be revised or deleted. The final text recorded here will appear in the invoice printout.

Itemizing the Invoice (2:52-4:05)

Now let's move to the **Invoice Items** sub-level form, in order to review the items being billed in this invoice. As you can see, the invoiced parts, with their quantities and other details, have been filled in automatically according to the documents linked to the invoice, but may be revised by adding or deleting lines. The **Unit Price** is filled in according to the system's price hierarchy, which is explained in detail in the column help, accessed by pressing **F1**. The **Price Source** column shows where each price was taken from. In any case, prices can be revised manually, if necessary.

If your company's prices usually include tax, you can simply record the total amount in the **Price Incl. Tax** column and the system will update the price before tax automatically.

The **Latest Part Sales to Customer** sub-level form is useful for comparing past invoices for this part for which the customer was billed. In the **Invoice Item – Remarks** sub-level form, you can record remarks pertaining to the line item that will appear in printouts. If remarks were defined for the part, they will be filled in automatically in this form, and will appear in the invoice printout when the **W/Extended Part Desc** print option is selected.

After you have finished itemizing the invoice, return to the upper-level form.

Finalizing and Printing the Invoice (4:06-4:59)

To finalize the invoice, **run the Finalize Invoice/Memo program** by Direct Activation from the form. Alternatively, you can **run the Finalize and Print Invoice/Memo program**, also by Direct Activation, to both finalize and print the invoice. The invoice will receive a permanent number in keeping with the numeration template defined at the beginning of the year, and a journal entry will be recorded for the invoice. To finalize several multi-shipment invoices at once, run the **Finalize Invoice** program from the menu. After finalizing an invoice, only certain things can be changed, such as the sales rep or contact. These changes can be made in the **Invoice Revisions** form.

If the invoice was recorded apart from the shipping or return document, you can link it retroactively to the document in the **Invoices Linked to Shipmts/Rtrns** form.

If you have not yet printed the invoice, you can **print it now by Direct Activation from the form.**

Automatic Preparation of Invoices (5:00-7:13)

We've seen how to record a multi-shipment invoice manually. As mentioned before, you can prepare a batch of invoices for all customers, automatically by using the **Prepare Invoices** program. The system will group together specific documents in a single multi-shipment invoice. For more information on how documents are grouped together, **right-click the program title and select Online Help**. In the screen that opens, click the following FAQ: "[What docs are included in a single multi-shipment invoice prepared automatically?](#)"

Several setups need to be performed if you prepare multi-shipment invoices automatically. If you want to open the invoice for the customer's billing customer, **enter the Financ. Parameters for Customers form**, retrieve the customers in question, and make sure that a billing customer has been defined in the **Customers** tab. In the **Invoices** tab, flag the **Inv. to Billing Customer** column. In the same tab, also flag the **Periodic Invoice** column. You can also define certain customers as entitled to delayed billing by flagging the **Delay Inv. to Next Month** column.

I'll now demonstrate how to prepare invoices with the program. You can run the program to prepare invoices for selected documents, for all documents that fall within a designated period, or for designated projects. In this example I'll choose **Selected Documents**. In the form that opens, retrieve the documents for which you want to prepare invoices. For example, retrieve all shipping documents for all customers in April. After retrieving, exit the form to return to the program. Make sure the **By Shipping Date** column is not flagged and then choose the desired **Invoice Date**. Choose a price list in the **Price List** column if you want invoice prices to be taken from a particular price list rather than the original document(s). When the program has been completed, a message listing the amount of invoices opened and their numbers will appear. Open the **Multi-Shipment Invoices** form to view the invoices. You can retrieve them by the invoice date. You can revise manually any of the invoices if necessary.

When you're finished reviewing the invoices, finalize them all at once by running the **Finalize Invoices** program as seen before. Then print them using the **Print Invoice/Credit Memo** program.

Follow-up Reports (7:14-7:43)

Various system reports are available for invoice analysis and follow-up, including summary reports and aging debts. You can also run various reports to review any billable documents that have not yet been invoiced in full, billable items that are still being checked and financial documents that have not yet been printed.

This concludes our demonstration of recording a multi-shipment invoice in **Priority**. You can read more about multi-shipment invoices in the **Customer Invoices Wizard**.