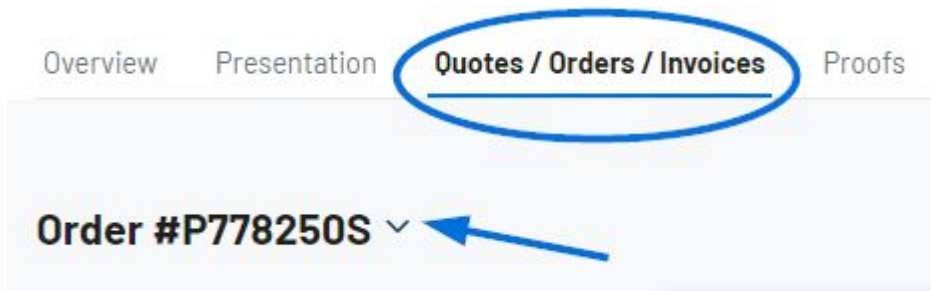


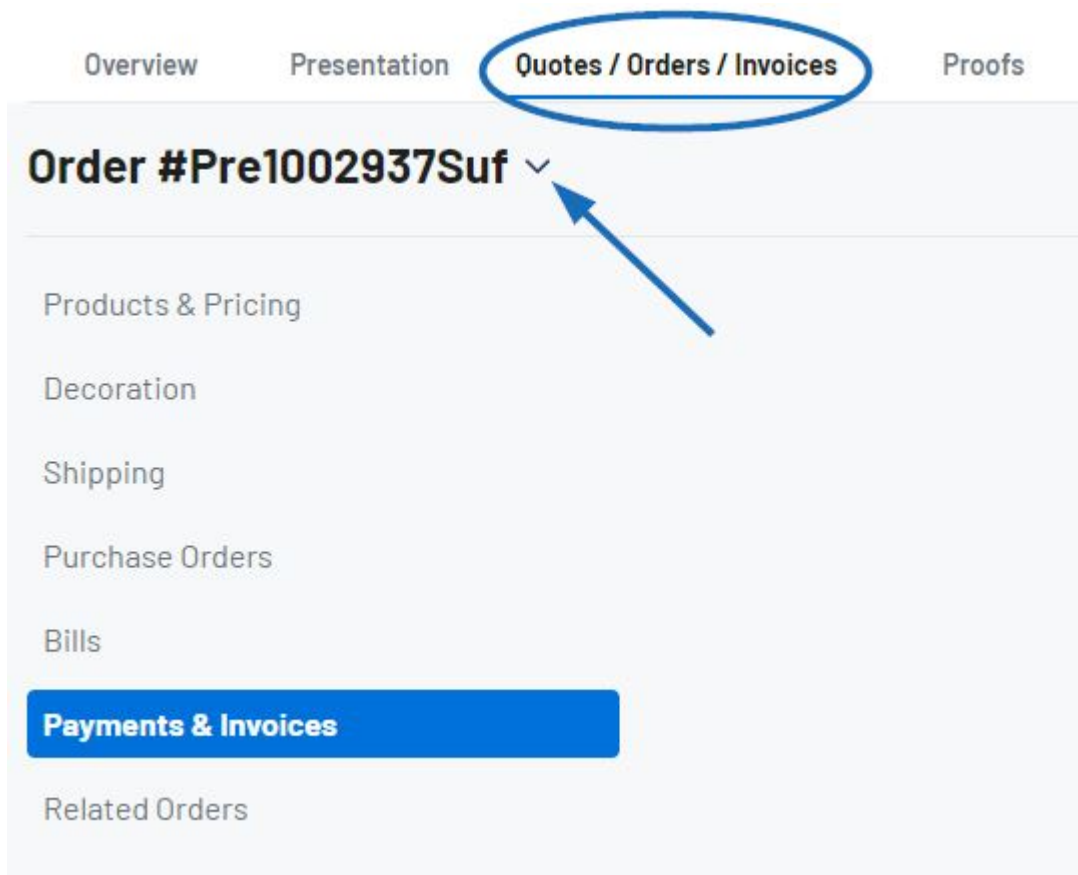
Create an Invoice

Jennifer M - 2024-05-03 - Invoices & Payments

An invoice is essentially an itemized bill that the distributor, sends to the customer. Invoices can be generated by opening an project and clicking into the Quotes/Orders/Invoices tab. Then, use the toggle to select the order.

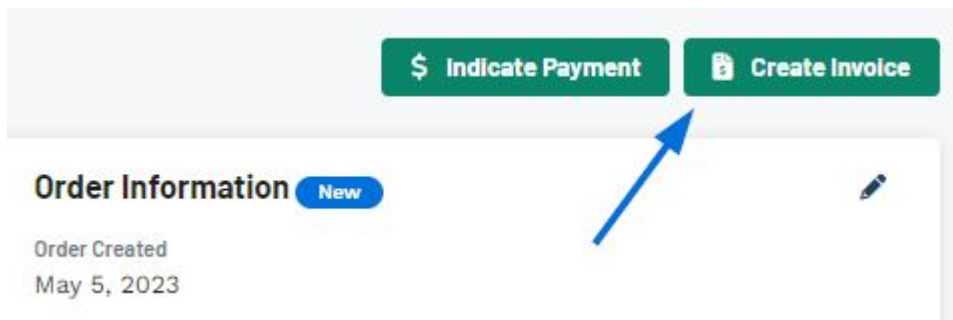


After selecting Order from the toggle, select Payments & Invoices.



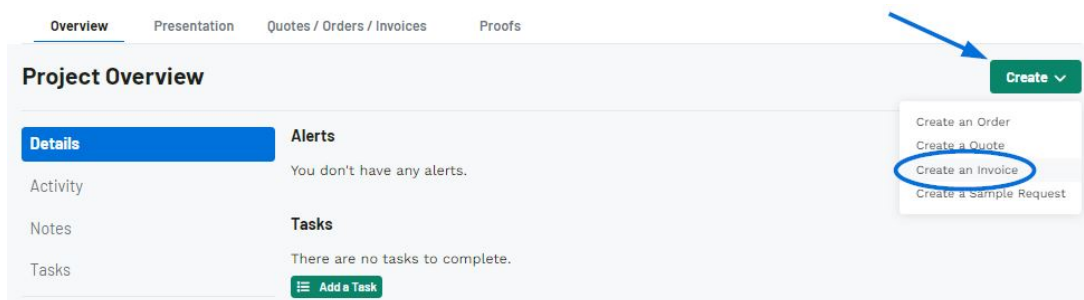
To generate an invoice, click on the Create Invoice button.

Note: Depending on the information included within the order, you may be prompted regarding whether you would like to copy certain fields from the order to the invoice.



Can I create an invoice independent from an order? (click for answer)

Yes, absolutely. To create a new invoice, go to the Overview tab of the Project. Click on the Create button and select Create Invoice option.



The Create a New Invoice for Project window will open and prompt you to enter information for the invoice. The Invoice Date, Sales Person, and Order Contact are required, but it is recommended to provide as much information as possible. When you are finished configuring the information, click on the Create Invoice button.

Create a New Invoice for Project

This invoice will be added to the project and can be added to or updated when viewing the project overview's quotes, orders and invoices tab.

Invoice Information

Invoice Date *

02/22/2024

Sales Person *

ESP User

Order Contact *

Jenn Mannino

PO Reference

Add a PO Reference

In-Hands Date

02/29/2024

Ship Date

Select a Date

☐ Flexible ☒ Firm

☐ Blind Ship

Shipping Method

Select a Shipping Method

Shipping Account

Add a Shipping Account #

Payment Method

Select a Payment Method

Credit Terms

Select Credit Terms

Create Invoice

The invoice will now be added as its own sales document in the Quotes/Orders/Invoices tab and accessible via the toggle.

Overview Presentation **Quotes / Orders / Invoices** Proofs

Invoice #P778251S

Related Content

- [Record Payment](#)
- [Quote vs Invoice](#)
- [Enable and Configure a Split Shipment](#)