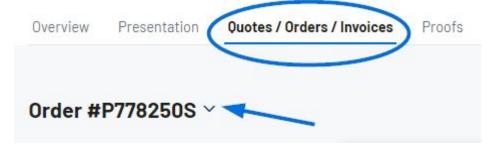
ESP+

Product Support > Quotes, Orders & Invoices > Invoices & Payments > Create an Invoice

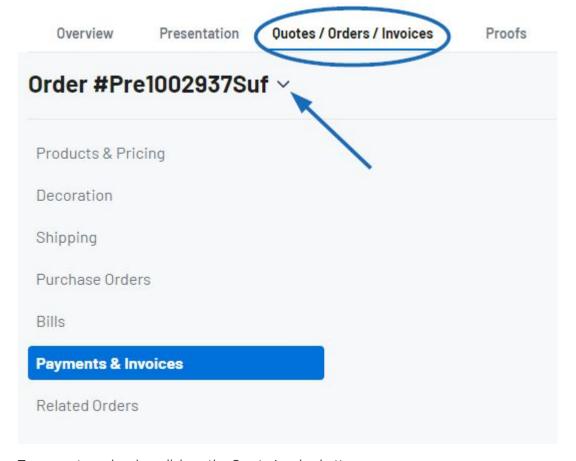
Create an Invoice

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.

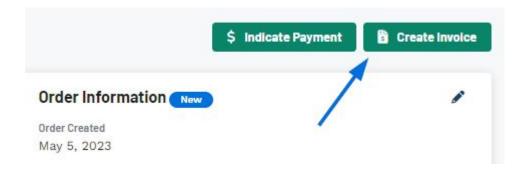


After selecting Order from the toggle, select Payments & Invoices.



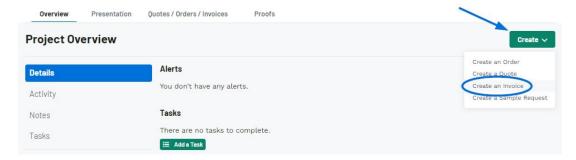
To generate an invoice, click on the Create Invoice button.

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.

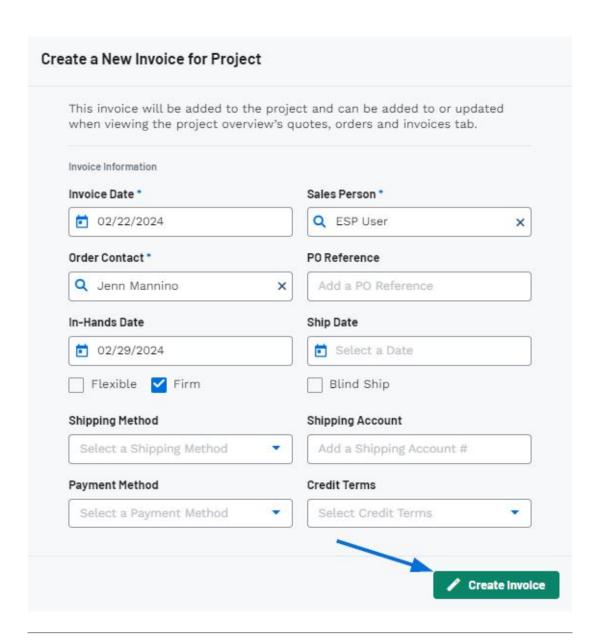


Can I create an invoice independent from an order? (click for answer)

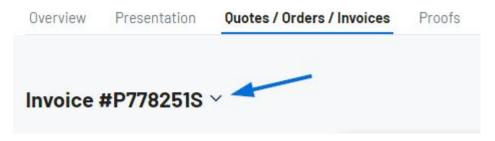
Yes, absolutely. To create a new invoice, go to the Overview tab of the Project. Click on the Create button and select Create Invoice option.



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.



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



Related Content

- Record Payment
- Quote vs Invoice
- Enable and Configure a Split Shipment