

# ESP+

Product Support > Quotes, Orders & Invoices > Invoices & Payments > Invoices

## Invoices

Jennifer M - 2024-09-27 - Invoices & Payments

An invoice is essentially an itemized bill that the distributor sends to the customer. To generate or create an invoice, open the project.

Invoices can be generated from an order, sample request, or created independently in the Overview or Invoices section.

### Generate an Invoice from an Order

To generate an invoice from an order, click into the Orders section and then click on the order number.

Overview Presentation Quotes **Orders** Invoices Sample Requests Proofs

### All Orders

Search Orders Sort By: Newest to Oldest

Order #	Products	Customer	Order Stage	Order Date
#1025	No Image Available	Example Customer Company	Order Created	09/25/2024

From the order details, click on Payment & Invoices from the options on the left. Click on the Create an 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.

### Order #1024

Products & Pricing  
Decoration  
Shipping  
Purchase Orders  
Bills  
**Payments & Invoices**  
Related Orders  
Notes

**You don't have any payments or invoices in this order yet.**

Add copy about how invoices and payments are added to an order

Indicate Payment **Create an Invoice**

### Generate an Invoice from a Sample Request

To generate an invoice from an order, click into the Sample Requests section and then click on the sample request number.

Overview Presentation Quotes Orders Invoices **Sample Requests** Proofs

### All Sample Request

Search Sample Requests Sort By: Newest to Oldest

Sample Request #	Products	Customer	Order Stage	Order Date
#1022	No Products	Example Customer Company	Sample Request Created	09/25/2024

From the order details, click on Payment & Invoices from the options on the left. Click on the Create an 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.

### Sample Request #1022

- Products & Pricing
- Decoration
- Shipping
- Purchase Orders
- Bills
- Payments & Invoices**
- Related Orders
- Notes

**You don't have any payments or invoices in this Sample Request yet.**

Add copy about how invoices and payments are added to an order


Indicate Payment **Create an Invoice**

### Create an Invoice from the Invoices section

Click into the Invoices section and then click on the Create an Invoice button.

Overview Presentation Quotes Orders Purchase Orders **Invoices** Sample Requests Proofs

### All Invoices



**Create Your First Invoice**

Cue the confetti: It's time to bill clients and get paid.

**Create an Invoice**

The Create a New Invoice for Project window will open and prompt you to enter information for the invoice. The Invoice Date and Sales Person 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 \*

09/27/2024

#### Sales Person \*

ESP User

#### Order Contact

Order Contact Disabled in Setti

#### PO Reference

Add a PO Reference

#### In-Hands Date

Select a Date

Flexible  Firm

#### Ship Date

Select a Date

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

## Create an Invoice from the Overview section

Click into the Overview section and then click on the Create an Invoice button.

### Invoices

You don't currently have any Invoices associated to this project yet.

Create an Invoice

The Create a New Invoice for Project window will open and prompt you to enter information for the invoice. The Invoice Date and Sales Person 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 \*

09/27/2024

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Order Contact Disabled in Setti

#### PO Reference

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Select a Date

Flexible  Firm

#### Ship Date

Select a Date

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

All invoices will be listed in the Invoices section.

Overview Presentation Quotes Orders Purchase Orders **Invoices** Sample Requests Proofs

### All Invoices

Search Invoices Sort By: Newest to Oldest

Invoice #	Products	Customer	Invoice Stage	Invoice Date
#1030	No Products	Example Customer Company	Invoice Created	09/27/2024
#1029		Example Customer Company	Invoice Created	09/27/2024
#1028		Example Customer Company	Invoice Created	09/27/2024
#1027	No Products	Example Customer Company	Invoice Created	09/27/2024

Click on the Invoice to open the detail page to update any information for the invoice. In the Products & Pricing section, all products within the invoice will be displayed. Click on the three dot icon and select Edit to update the product details and/or pricing information for

that product.

**Invoice #1028**

**Products & Pricing**

Decorations  
Shipping  
Bills  
Payments  
Related Orders  
Notes

**Pen**  
CPN-554918396  
Advertising Spec Inst. (ASI)  
asi/33020  
★★★★☆ (1)

Item	Ordered Qty	Invoiced Qty	Net Cost	Margin	Price	Total Cost	Total Price	Tax
Assorted	1000	1000	\$1,000	50.0%	\$2,000	\$1,000.00	\$2,000.00	<input checked="" type="checkbox"/>
<b>Total Units</b>	<b>1000</b>	<b>1000</b>	-	-	-	-	-	-
<b>Grand Total</b>						<b>\$1,000.00</b>	<b>\$2,000.00</b>	<b>0.00%</b>

Dropdown menu options: Edit, Copy, Delete

When you have finished configuring the invoice information, click on the Share button and select Send to Customer.

Buttons: Preview, Share

Dropdown menu options: Send to Customer, Send to QuickBooks

There are two send options:

- **Share via Email**

When sharing an invoice with a customer via email, select a due date. The address in the customer's CRM record will be displayed in the Recipients box. If no email address exists for this customer or you'd like to send to a different email, you can enter one in the Recipients box. The Subject Line and Message can be customized in the Email and Message Templates section of the Account - Settings section. You can click on the Preview Order button to view the customer's portal and once you're ready, click on the Send Email button.

- **Share via Link**

Select a due date for the invoice and then click on the Copy Link button. The Invoice will now be available in the client portal for the customer to review.

Related Content

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