

# Invoice Shipments for Sage 300cloud

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For many businesses, shipping an order and invoicing the shipment is a two-step process. A shipment is created from an order, and once the order has shipped, an invoice is created. In Sage 300, this two-step process can be very time consuming as each shipment must be called up in the Order Entry Invoices application and then invoiced.

Invoice Shipments eliminates time-consuming steps involved in invoicing shipments from Sage 300 Order Entry. It lets you select the set of shipments, and then click a button to create the invoices. The time savings are significant for businesses that want to create all invoices as an end-of-day procedure.

A key feature – the ability to control the invoice date – is provided for businesses that ship at the end of a day and invoice the following day with the previous day's date. In addition, it includes several options for consolidating invoices for shipments.

## Notes:

Invoice Shipments will either create a separate invoice for each selected customer shipment or create a single invoice for all selected customer shipments or create a single invoice for all customer shipments on a particular date.

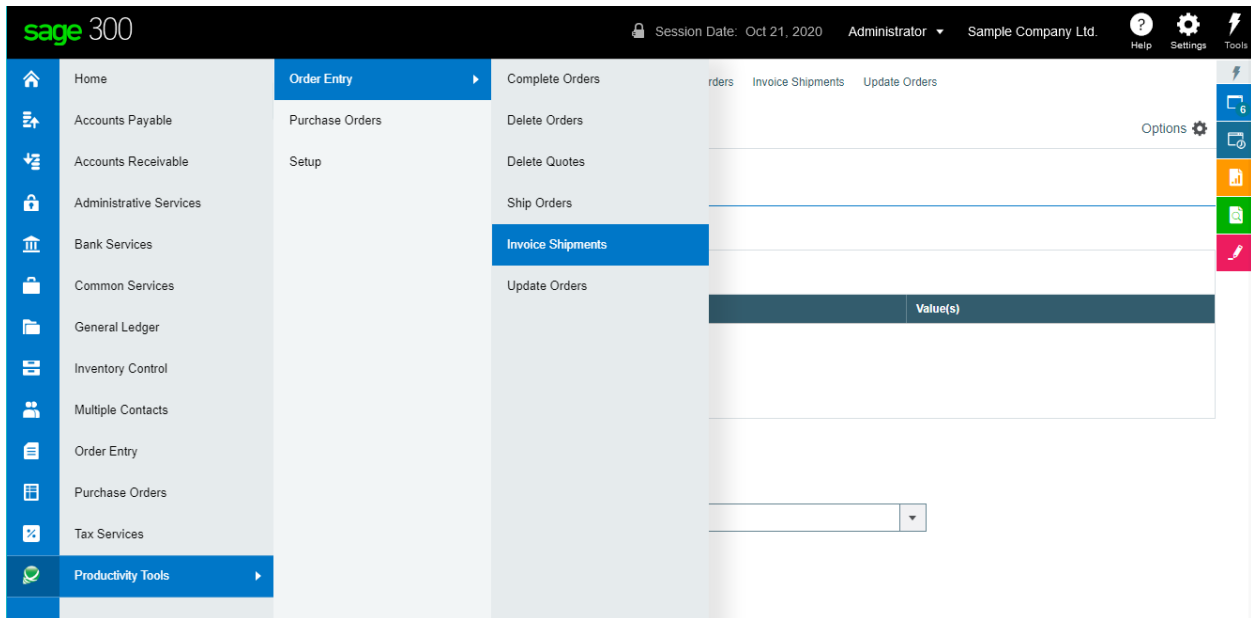
**RE Credit Limits:** If shipping orders would cause a customer to go beyond their credit limit and you wish the limit to be overridden, an option is provided to enter the name and password of a user with the rights to override this limit.

## Invoice Shipments lets you:

- Select shipments by specifying ranges such as shipment numbers, shipment dates, customer numbers, and optional fields used in shipments.
- Filter invoicing by location.
- Create invoices for shipments as follows:
  - Create separate invoices for each customer shipment
  - Create one invoice for each customer, for all customer's shipments
  - Create one invoice for each customer, for all customer's shipments on the same shipment date
  - Create one invoice for each customer, for all customer's shipments with the same order number
- Set the invoice date to the shipment date or specify the date for all invoices.
- Enter the name and password of a user with the rights to **override credit limits** if invoicing shipments that would cause a customer to go beyond their credit limit.
- After selection, review the list of shipments and cherry-pick ones for invoicing.
- Click the Process button to complete the operation in one step.

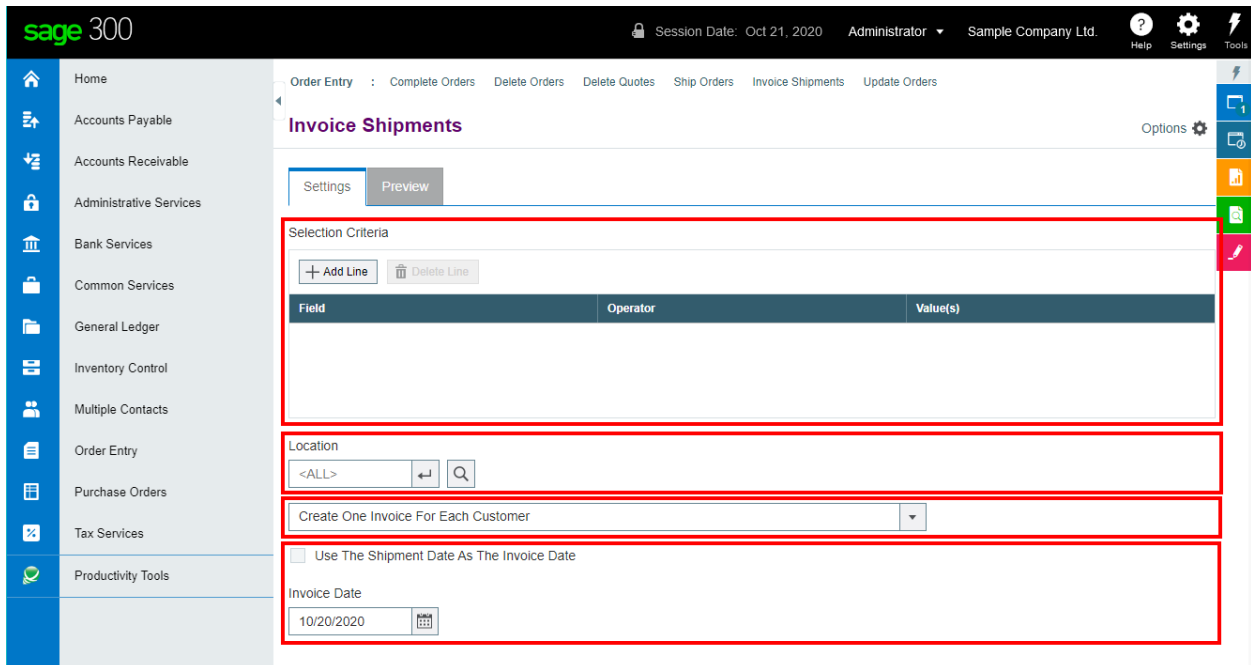
## Using Invoice Shipments

Invoice Shipments appears under **Productivity Tools > Order Entry Tools** on the Sage 300 desktop.



The Invoice Shipments screen (below) lets you select orders for invoicing by specifying various ranges of order fields, including order numbers, order dates, customer numbers, and optional fields.

Invoice Shipments also lets you specify an inventory location, choose whether you want to create one invoice for each shipment, one invoice for each customer, one invoice per customer per shipment data, or one invoice per customer per order. You can specify an invoice date or choose to match the shipment date.



## Selecting and processing shipments for invoicing

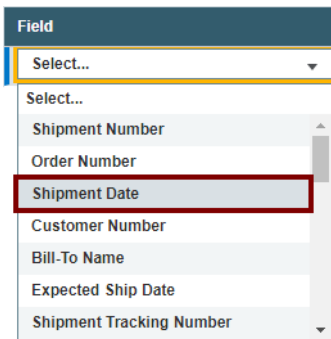
### Choose the range of shipments that you want to invoice:

You can select orders for invoicing by specifying various ranges of order fields, including order numbers, shipment numbers, shipment dates, customer numbers, and optional fields.

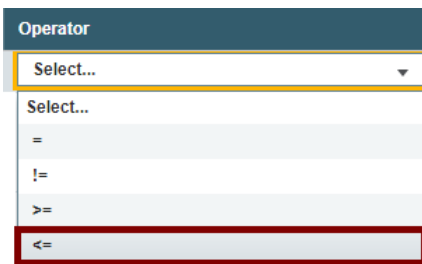
- Click the “Add Line” button to specify a new field range.



- Choose the field for selecting shipments.



- Choose the Operator for the field value – for example, shipments with a date that is **less than or equal to** July 2, 2021. The choices are “Equal To,” “Not Equal To,” “Contains,” “Greater Than or Equal To,” “Less Than or Equal To” (shown below), or “Is One Of.”



- **The “Contains” operator appears for text fields.** The program scans the field you selected for the text in the Value field.

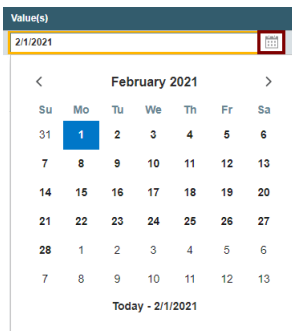
The following example selects shipments for customers in groups that include the letters “US”.

Field	Operator	Value(s)
Customer Group Code	Contains	US

- **The “Is One Of” operator appears for fields with a specific list of values** – such as optional fields with a list of values. It lets you specify more than one value – as below.

Field	Operator	Value(s)
UPS Zone	Is One Of	Blue Zone × White Zone ×

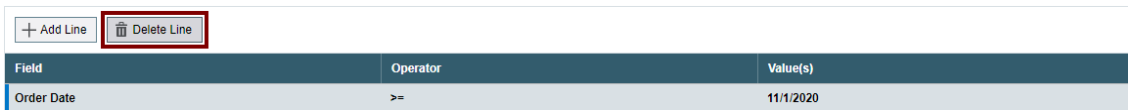
- Enter or choose the Value. For example, a date field provides a calendar and other fields will provide a Finder button.



- To specify a range of dates – for example, greater than November 1, 2020 and less than January 31, 2021 – you would add two lines for the Date field – as shown below:

Field	Operator	Value(s)
Order Date	>=	11/1/2020
Order Date	<=	1/31/2021

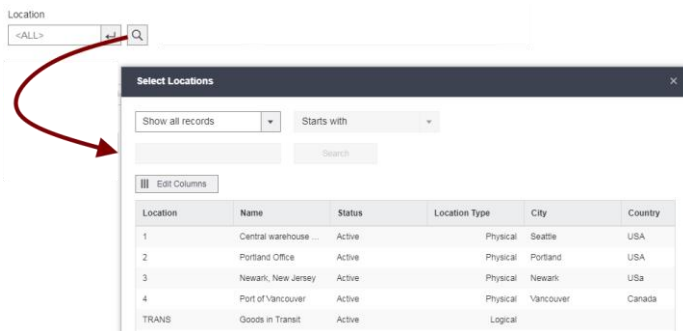
- To remove a line, highlight it, then click the “Delete Line” button:



**Specify one or all locations:**

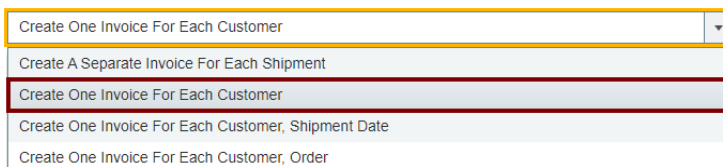
The Location drop-down lets you invoice shipments by location. This means that shipments will be selected if any detail lines match the specific location.

- To invoice shipments from a single location, enter the location or click the Finder button to select from the Finder.
- Note that shipments cannot be partially invoiced, so all detail lines will be invoiced – whether or not they are for the specific location you choose.



**Choose how you want to invoice shipments:**

Invoice Shipments provides four options for invoicing shipments:



**Notes:**

- For example, this setting can determine whether you create 5 invoices for a customer (1 for each of 5 shipments) or 1 invoice for that customer (for all 5 shipments).


If you save your settings, they will be remembered from session to session, so be sure to confirm the setting. Invoice Shipments also requires confirmation when you click the Process button.

**Enter the Invoice Date or Use the Shipment Date as the Invoice Date:**

The invoice date defaults to today's date. You can change the date, or you can select the option to use the shipment date as the invoice date.

Use The Shipment Date As The Invoice Date

Invoice Date

2/2/2021 

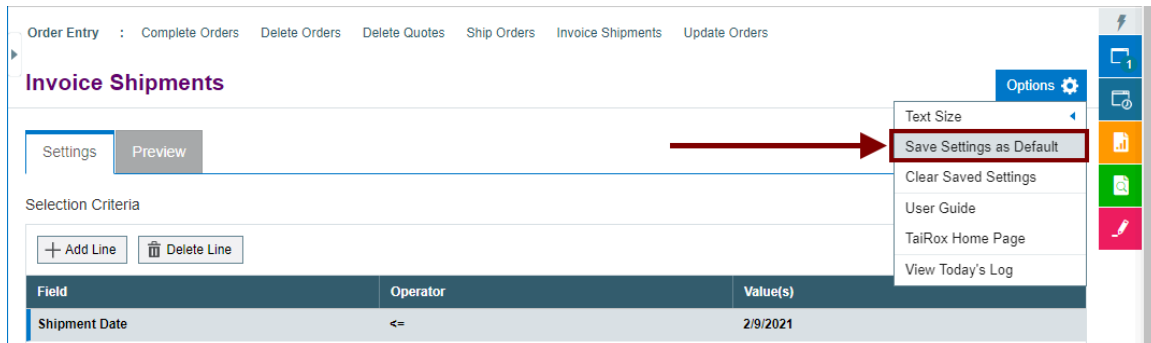
**If necessary, supply a credit approver to override credit limits:**

If the person invoicing the shipments does not have sufficient permissions to override credit limits, the program will ask you to add the ID and password of a user with full rights.

**Note:** This happens only if invoicing shipments would cause a customer to go beyond their credit limit and you want the limit to be overridden.

**Save or clear the selection criteria:**

You can save your selection criteria so it appears by default the next time you use the program.



Field	Operator	Value(s)
Shipment Date	<=	2/9/2021

- Click the Options button to display the list of options.
- Select "Save Settings as Default."

**To clear the default settings:**

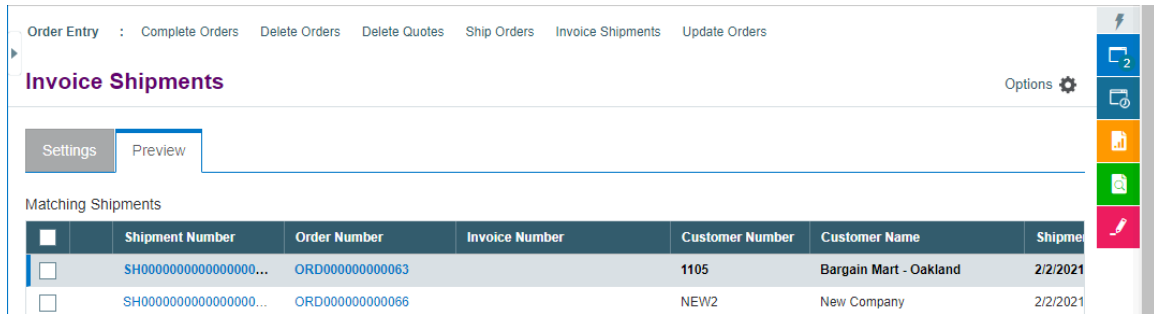
- Select "Clear Saved Settings" from the Options menu.

**View selected shipments on the Preview tab and choose which ones to invoice:**

Click the Preview tab to view the list of shipments that meet the range and item selection criteria that you specified on the Settings tab.

**Note:** If you do not specify any selection criteria, the program will list all uninvoiced shipments when you go to the Preview tab. You can then select the shipments that you want to invoice.

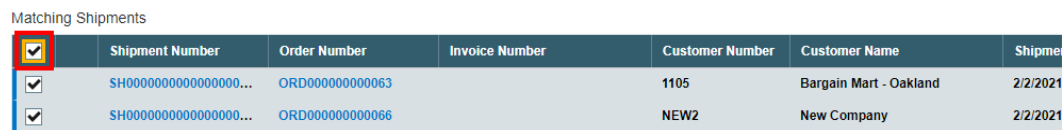
- Click the **Preview** tab to display the selected list of shipments.



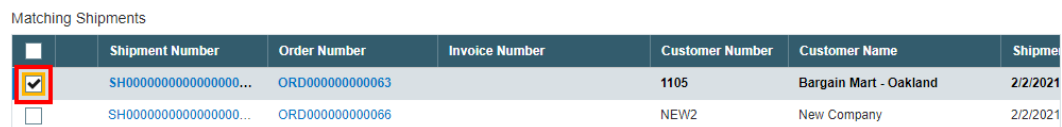
All active shipments that match the selection criteria on the Settings tab will be displayed. Click the shipment number to drill down to shipments to confirm your selections.

**Important Note:** Shipments are selected for inclusion *based on the moment you click the Preview tab*. This means that shipments may be changed before processing is completed. Make sure that you consult the log after processing to see exactly what takes place.

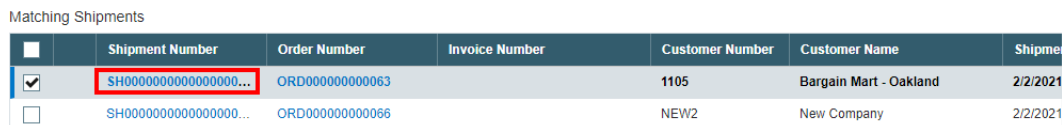
- You can go back to the Settings tab to adjust the ranges and options, if necessary, and then click the Preview tab again.
- Click the checkbox in the column heading to select all or select none of the shipments loaded in the grid.



- Click the checkboxes on each row to cherry-pick shipments for invoicing.

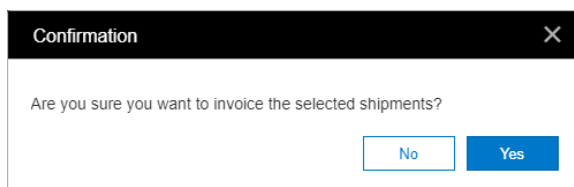


- Click the Shipment Number to drill down to a shipment.



**Click the Process button to invoice the included shipments:**

The program asks you to confirm your choices. Click Yes to continue.



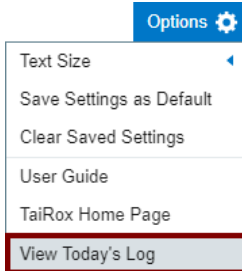
**Note:** There may be data-integrity errors that prevent some invoicing, in which case an error message will appear.

If the process was successful, the following message will appear, stating the number of shipments that were invoiced:



**Select “View Today’s Log” to confirm which shipments were invoiced:**

- Click the Options button and select View Today’s Log to see the shipment selection criteria and the shipments that were invoiced.



- The log looks like this:

```

TPInvoiceShipments-PTDEMO-20190708.log
Processing started (7/8/2019 10:45:44 AM)
Performed by user: ADMIN
Selection Criteria:
  Customer Number          =          [1200]
Location: 4
Create One Invoice for Each Customer
Use the Shipment Date as the Invoice Date: No
Invoice Date: 7/8/2019
Creating invoice for 1200...
  Invoicing shipment SH0000000000000000067...
  Invoice number IN0000000000068.
Processing completed (7/8/2019 10:45:45 AM)
=====
    
```

The Log lists:

- The user and the settings for selecting shipments.
- Each shipment that was invoiced, along with the shipment and invoice numbers.