Bill a Single Sales Order

Billing a Sales Order indicates you have already fulfilled the items purchased by your customers and creates an Invoice that posts to Accounts Receivable. You can turn the Sales Order into an Invoice without re-keying any data.

At the beginning of each day, review the daily sales orders to bill. All customer orders are shipped at midnight and need to be billed the next day. Review the details on each bill listed prior to billing the sales order.

Steps

1. From the Reminders Portlet and select Sales Orders to Invoice.
2. Select a Customer.
4. Navigate to the Orders subtab.
5. Locate the sales order and click Invoice.
6. Verify the Invoice #.
7. Verify the Date, Posting Period and Due Date; modify as needed.
8. Enter the customer’s PO # to help them to locate this invoice.
9. Enter a descriptive Memo.
   NOTE: This will appear on the second line on the Accounts Receivable register.
10. Navigate to the Sales Information section.
11. Review the sales information; modify as needed.
12. Review the Classification section.
13. Select the Location.
   NOTE: The system will assume that inventory items will be fulfilled from this location.
15. Navigate to the Items > Items subtab.
16. Select the Item.
17. Enter the Quantity and Units for the item.
18. Review the Rate. To enter a new rate, select Custom from the Price Level drop-down menu.
19. The Amount is calculated automatically, based on the stated (Quantity * Rate).
20. Review the revenue recognition information that defaults from the item record; modify as needed:
   • Rev. Rec. Schedule

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21 Click Add and repeat for each item.

22 Navigate to the Shipping subtab.

23 Review the Shipping Information.

24 Navigate to the Billing subtab.

25 Review the Billing Information and Billing Address sections.

26 CONFIRM THE TERMS for this invoice; modify as needed.

27 Navigate to Accounting subtab.

28 Review the Account Information, Revenue and Gross Profit sections.

29 Verify the Accounts Receivable Account; modify as needed.

30 Verify the Currency and Exchange Rate for this invoice; modify as needed.

31 Click Save, or click Save & Print to print the invoice.