

Invoicing Overview

Invoicing is the final step in the sales order cycle.

In this course we will review the processes available within Order Monitor for Will Call Sales and Delivered Sales. We will also discuss how to Approve and Invoice Orders.

When a customer comes in to pick up a 'Will Call' type sale, select 'Order Monitor' from the 'Home' tab Dispatch group.

Set the 'Filter' to 'Orders for Pick Up'.

In the 'Find' text box, enter the order number when known.

You can also search by the customer name using the 'Enter Search Text' dialog box, here.

Click 'Go'.

Double Click the line to open the order.

Select 'Confirm Pick Up' from the toolbar.

The window to 'Release Invoices' is shown with today's date listed as the 'Release date'.

To print and or email the invoice, check the related box.

Click 'Ok' or press 'F12' to proceed.

The stock is issued and the order status changed to 'Invoiced'.

For 'Delivered' charge sales you may be processing several orders that are being delivered within the same delivery run.

From 'Order Monitor', set the 'Filter' to 'Orders for Delivery'.

Set additional filters such as the order numbers separated by a comma or by using a custom date range.

Select all of the orders using 'Shift' and the left-click on your mouse.

Then select 'Mark Delivered' from the toolbar button.

You can also right-click to select 'Mark Delivered' from the 'Mark Order' menu.

Enter the 'Delivery date' for the selected orders.

Enter a 'Reference' and select the 'Vehicle Type'.

The checkbox is flagged to 'Print the delivery note document set'.

Uncheck if you do not want these documents printed.

Click 'OK' to proceed.

The status of the orders change to 'Invoicing'.

Delivered Charge orders need to be 'Approved' and 'Invoiced' to complete the sales processing cycle.

From within 'Order Monitor' set the 'Filter' to 'Orders for Invoicing'.

Set additional filters such as the order numbers separated by a comma or by using a custom date range.

In not already, check the option 'Only orders at this status'.

Shown are Delivered Charge orders at an 'Invoicing' status.

At this point, a review of the orders can be done prior to approval.

Select one or a range of invoices then click the 'Approve' button found on the toolbar.

Click 'Yes' to approve the selected orders.

With the same orders selected, click on the 'Invoice' button.

Click 'Yes' to invoice the selected orders.

The window to 'Release Invoices' is shown with today's date listed as the 'Release date'.

To print and or email the invoices, check the related box.

Click 'Ok' or press 'F12' to proceed.

The status of the orders is 'Invoiced'.

You should now be able to utilize Order Monitor to invoice both Will Call and Delivered sales.

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