

Invoicing Overview Transcript

Robert

Yup, we can do that, I'll charge it to your account, and have it ready for pickup.

Andrew

What was that?

Robert

Oh, it was a customer placing an order for Will Call. I've made the Sales Order, but what's the process once they come to get it? Something about Order Monitor, right?

Andrew

That's right, why don't I walk you through invoicing orders. I'll show you how to handle Will Call Sales, Delivered Charge sales, and finish by covering Approving and Invoicing.

Topics

- Using Order Monitor with Will Call Sales
- Using Order Monitor with Delivered Charge Sales
- Approve and Invoice Orders

Using Order Monitor with Will Call Sales

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.

Enter the Order Number in the Find field and select Go.

Double-click the line to open the order.

Select Confirm Pick Up from the toolbar.

Decide if you want to print and or email the invoices and enable their respective check boxes.

Select OK to proceed.

The system records the stock as issued and changes the status to Invoiced.

Using Order Monitor with Delivered Charge Sales

Using Order Monitor with Delivered Charge Sales uses a process like that in Will Call Sales.

In Order Monitor, change the filter to Orders for Delivery.

Enter the Order Number in the Find field and select Go.

Choose Mark Delivered on the toolbar, or select the order in the grid and use the right-click menu to choose Mark Delivered

Enter the Delivery date and other information as necessary.

Press OK.

Decide if you want to print and or email the invoices and enable their respective check boxes.

Select OK to proceed.

The system changes the status to Invoicing.

Approve and Invoice Orders

To complete the sales processing cycle, you'll need to approve and invoice delivery charge orders.

In Order Monitor, change the filter to Orders for Invoicing and enable the Only orders at this status check box.

Press Go.

The system displays Delivered Charge orders with a status of Invoicing.

You can review them before approving.

Choose one or a range of invoices that you want to approve and then select the Approve button in the tool bar.

Click Yes to continue.

With the same orders selected, click the Invoice button and choose yes to proceed.

Decide if you want to print and/or email the final documents and select OK.

The system updates the order status to invoiced.

The contents of this document are for informational purposes only and are subject to change without notice. Epicor Software Corporation makes no guarantee, representations or warranties with regard to the enclosed information and specifically disclaims, to the full extent of the law, any applicable implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality or reasonable skill and care. This document and its contents, including the viewpoints, dates and functional content expressed herein are believed to be accurate as of its date of publication. The usage of any Epicor software shall be pursuant to the applicable end user license agreement and the performance of any consulting services by Epicor personnel shall be pursuant to applicable standard services terms and conditions. Usage of the solution(s) described in this document with other Epicor software or third party products may require the purchase of licenses for such other products. Epicor, the Epicor logo, and are trademarks of Epicor Software Corporation, registered in the United States and other countries. All other marks are owned by their respective owners. Copyright © 2016 Epicor Software Corporation. All rights reserved.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, [connect with Epicor](#) or visit www.epicor.com.



Corporate Office

804 Las Cimas Parkway
Austin, TX 78746
USA

Toll Free: +1.888.448.2636
Direct: +1.512.328.2300
Fax: +1.512.278.5590

Latin America and Caribbean

Blvd. Antonio L. Rodriguez #1882 Int. 104
Plaza Central, Col. Santa Maria
Monterrey, Nuevo Leon, CP 64650
Mexico

Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

Europe, Middle East and Africa

No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom

Phone: +44.1344.468468
Fax: +44.1344.468010

Asia

238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684

Singapore
Phone: +65.6333.8121
Fax: +65.6333.8131

Australia and New Zealand

Suite 2 Level 8,
100 Pacific Highway
North Sydney, NSW 2060
Australia

Phone: +61.2.9927.6200
Fax: +61.2.9927.6298