Invoice Screen - How To's

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This is a comprehensive screen that stores and displays every significant information about an Invoice transaction all on one screen. It is divided into four (4) main sections to organize data and functions:

- **Main Fields (section)**
  - **Bill To -** The entity who will pay for the order.
  - **Ship To -** The entity who will receive the order.
  - **Invoice # -** Record numbering type can be set at**Settings>System>Record Numbering** as manual, sequential or date format.
  - **Order #** - The Sales Order related to the Invoice.
  - **Warehouse**
  - **Last Synced -** Date & time last synced with QuickBooks Online
  - **To Sync** (QBO) - (checkbox) gets checked automatically each time a new Invoice record is created in 1place then syncs with QuickBooks Online (QBO) when the record is saved.
  - **Resync Flag -** (checkbox) gets checked when an Invoice record is changed in 1place then syncs with QBO.
  - **Invoice Date** - The date the Invoice was created.
  - **Entered By** - Creator of the Invoice.
  - **Customer PO # -** The Purchase Order # on the Customer's purchase document. (Optional) For document tracking purposes.
  - **Payment Terms -** Payment terms and conditions you set as the seller. Pre-define your Payment Terms settings according to your company set conditions. **Go to Settings>Sales>General Sales Settings>Payment terms (section).**
  - **Sales Rep -** The Sales Representative who communicated or closed the sale.
  - **Order Source -** Where an order originated from.
  - **Shipped Via -** The shipping method.
  - **Email**
  - **Job ID -** The Job record related to the Invoice.
- **Add/Edit Line Item (section)**
  - **Audit Log**
    
    icon - Lets you view all updates (and details) made on this section.
  - **Gear**
    
    icon - Click to view all Column Filters on this section. You may check/uncheck to show/hide these fields.
  - **Double Arrow Down**

    icon - Click to show Line 2 fields.
  - **Double Arrow Up**

    icon - Click to hide Line 2 fields.
  - **Add/Edit Line Item (table)**

Line 1 (Column Filters/Fields)	Description
Qty Ord (Quantity Order)	
Category	
Item #	
DS (Drop Ship - checkbox)	Check this box if opting for drop shipping.
Qty Ship (Quantity Ship)	The quantity (of the item) committed or shipped to the Customer.
Qty BO (Quantity Back Order)	The quantity (of the item) that needs to be purchased to fulfill an order.
Prev Shp (Previous Ship)	The quantity (of the item) previously shipped to the Customer (from the last transa
Qty Rtn (Quantity Return)	The quantity (of the item) returned by the Customer, if any.
Description	Specified item description which includes the Year, Make, Model and item categor
PO (checkbox)	This is checked when Qty Ord is greater than Qty Ship.
PO#	The Purchase Order Number generated by the system.
List Price	The basic price of an item in your catalog. Also known as the Suggested Retail Pric
Unit Price	
Disc % (Discount)	The discount % applied to the item that is reflected on the Invoice.
Net Price	The final Price offer of an item (after any markups or discounts).
Tax (checkbox)	This is checked when an item is taxable.
Line Total	The total Price computation (before taxes) of each Line item on the Invoice.

Line 2 (Column Filters/Fields)	Description
Date Shipped	
Group	
Transfer From WH	
Shipped From WH	
Comments	(Optional) Any specific notes for a particular Invoice line item.
Vendor	Name of Supplier or Vendor.
Serial #	The unique code or part identifier of a specific item.
Invoice CM #	
Gross Margin	
Unit Cost	
Bin	This is an alpha-numeric field used by the Stock Picking Tickets to arrange the orde
Lot/Serial #	

- **Tabs (section)** - *see below.*
- **Footer (section)**
  - **New** (button) - To create a new Sales Invoice record.
  - **Delete** (button) - To delete that Sales Invoice.
  - **Refresh** (button)
  - **Receive / Edit Payment(s)** (button)
  - **Create Credit Memo** (button)
  - **Send Email** (button)
  - **Print** (button)
  - **Save** (button) - To save the actions/changes made on that screen.
  - **Help** (button) - Leads you to self-help articles about the **Invoice** screen.
  - **Close** (button) - To close that screen.

- Shortcut Key: **Ctrl + F7**, or

- On the **Quick Start Menu**, click the + icon and select **Invoices & Credits,** or
- Click the **New** button on the lower left part of the **Invoice List** screen, or
- On any **Sales Order** screen, click **Create Invoice** button to make an **Invoice** record for that particular Sales Order.

- Using **Shortcut Key**: **F7,** or
- On the **Quick Start Menu**, click the **Search** (magnifying glass) icon then select **Invoice,** or
- (If already on the **Invoices & Credits List** screen) use the Search feature (magnifying glass icon) to type the Invoice number or any information/keywords to filter multi search, or
- On any **Sales Order** screens, click the magnifying glass icon beside the **Invoice #** (upper right part of the screen). This will display the particular Invoice record associated with that Sales Order.

- Shortcut Key: **Shift+F7**, or
- On the **Quick Start Menu**, click the **List** button and select **Invoices**, or
- On the **Main Menu Bar**, click **Sales>Invoices & Credits**.

- On the **Invoice List** screen, check the box/es (first column on the left) to select one or more records then click **Batch Actions** button and select **Delete Selected**, or
- Click the first box (topmost, on the fields row) to either select all records on a page or all records on the entire list then proceed with deletion, or
- On the **Invoice** screen, click **Delete** button (lower left part of the screen).
- Note: To preserve the integrity of the database, you cannot delete any Invoice record that has been used on any of the screens such as Sales Orders, Credit Memo, associated **Purchase Orders,** etc.

- Consider below pointers:
  - You cannot add Line items on the Invoice screen.
  - Invoice Line Item/s cannot be edited except for the following fields:
    - Description
    - Prices
    - Discount
    - Qty Return
- If opting to delete an Invoice Line item, delete first the related line item on the Sales Order screen.

With the invoice screen open do the following:

- Open the Invoice screen.
- Click the Create Credit Memo button.
- When prompted to return all items on the Invoice click Yes.

With the invoice screen open do the following:

- Open the Invoice screen.
- Enter the quantity that you want to return in the Qty Rtn field. (Note: If the Qty Rtn field is note visible, click on **Gear**
  icon and check the Qty Rtn field to make it visible).
- Click the Create Credit Memo button.

- When prompted to return all items on the Invoice click No. Then when prompted to return any items where the Qty Rtn > 0 click Yes.

- On the **Main Menu** bar, click on **Reports > Invoices/Credits.**
- Define your Report.
    - **1place** allows you to generate different types of Invoices/Credit Memo Reports according to your needs. Pick from the type of Invoices/Credits Report (i.e. Invoices/Credits By Customer, Invoices/Credits By Date, Invoices/Credits By Product, etc.) from the **Reports section.**
        - Note: You can adjust the period covered by your report**.** On the **Report Period** filter section, select from the **drop down** filter lists or manually input the dates 'from' and 'to'.
- Click on **Run Report**.
    - Note1: There is an option to further customize your Report by clicking the **Gear** (gray) icon to make the **Report Lists Settings popup** screen appear. Check or uncheck box(es) of the column(s) that you prefer to show/hide.
    - Note2: At this point, you may choose to Print, Email or Download your Report copy.

- After doing the instructions above, click on the **Customize** (blue) button to further modify and save your newly created Report.
- On the **Customize Report popup** screen:
    - (Optional) Select the **Min Access Level** from the **drop down** icon.
    - (Required) Type in the **Report Name** (whatever you want to call your Report).
    - (Optional) Type in any **Report Description**.
    - (Optional) Check the box if you want to **Make Report Private** and/or **Favorite**. Check or uncheck box(es) of the column(s) that you prefer to show/hide.
    - Click on **Save.**
    - Note1: This Report will appear on the list of **Custom Reports** and on **My Favorites** if you checked the **Favorite** box.
    - Note2: You can always edit or update any Custom Reports. Go to **Reports** > **Custom Reports** and click on the **Pencil** icon (under **Actions** column). Do the necessary changes and click on **Update**.
    - Note3: Click on the **X** button to permanently delete any Custom Report from the list.
- Note: You have the option to Email, Print or Download a Report copy (see instructions below).

- On the Invoice **List** screen:
    - Select the record(s) by checking the box(es) .
    - Click the
      button to Print and
      to download (in Excel form).
    - There is also an option to Share
      record(s) and this feature will be available in the future.
- For Invoice/Credit Memo Reports, go to **Main Menu Bar** > **Reports** > **Invoices/Credit Memos,** create your Report (*see previous instructions) then click on the
  button (upper right).

- The **Print Preview** popup screen will appear.
  - DOWNLOAD COPY: Click on  button (upper right) to download the Report. Save in your PC.
  - EMAIL COPY: Click on 

button (lower right) to send a copy of the Report through email. Create the body of the Email and input other necessary details on the left side of the **Email popup** screen. Click on 

button (lower right).
  - PRINT COPY: Click on  **button** (upper right) to print the Report. Adjust Print Settings then click on 

button (lower right).

Input any comments or notes related to the particular Sales Invoice transaction.

This tab shows ALL payments made by the Customer for the particular Sales transaction. More importantly, it is also used to receive payment(s) from your Customers. Receiving a payment on an Invoice is similar to receiving a deposit / pre-payment on a Sales Order.

- To Apply a Payment to an Invoice:
  - On the **Invoice** screen, click on the **Payment Info** tab then click on the **Receive/Edit Payment(s)** button.
  - The **Payments** popup screen will show. **Note**: If previous payments have been made (i.e. deposit payment on the related Sales Order transaction), this popup automatically shows the sum total of payments on the **Total Prev Payments** box as well as the **Amount Due**.
      - **GL Account**: If necessary, select a specific GL account. Otherwise, select 'Undeposited Funds' account (to make a deposit later on).
      - **Date Paid**: If necessary, change the (default) date.
      - **Payment Method**: Choose the type of payment.
      - **Check #**: If necessary, enter a check or card number.
      - **Authorization #**: Enter the credit card authorization number.
      - **Amount Tendered:** Input the Deposit Amount.
        - Note1: The system automatically fills the **Amount Tendered** box (which is the amount still due) but you may edit accordingly.
    - Click on **Apply Payment**.
      - Note: A **'PAID'** stamp will appear beside the **Receive/Edit Payment(s) table** when the Invoice is fully paid.

This tab contains other important information about the Invoice such as:

- **Created By**
- **Created Date/Time**
- **Originally Creatid In**
- **Print Previewed Date/Time**

- **Emailed Date/Time**

Article coming soon.

Related Article: How to Return Items (After They Have Been Invoiced)

Overview: Write a customer a check for credit memo instead of applying it on an invoice.

1. Go to + New tab, then select 'Check' under 'Vendors' column'

2. This will lead you to 'Check #To print' screen. Enter the following:
   - On the 'Category details' section, choose 'Accounts Receivable';
   - On the 'Amount' section, enter the Credit Memo amount

3.Click 'Save and Close'

4. After creating the check, apply the related Credit Memo. Click '+New' button, choose 'Receive payment under Customer column.

5. This will lead you to the 'Receive Payment' screen. Choose the customer's name on the Customer field.

6. Select the check created on the 'Outstanding Transaction' section and the 'Unapplied Payment' on the credits section.

7. Ensure that the 'Amount Received' is zero, then click 'Save and Close'.