How to create & print Invoices (in batches)

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Overview

This article explains how to create a batch of Invoices from the Shipping & Receiving screen.

Before You Begin

This article assumes you have already created 1 or more **Sales Orders** that are ready to be **Invoiced** in a batch of **Invoices**.

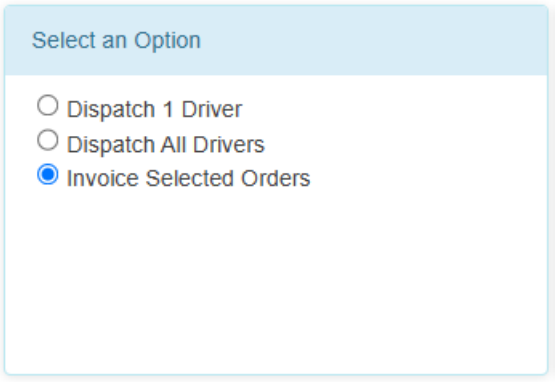
> **Note**: The **Shipping & Receiving** screen provides to way to see the status of ALL (open) **Sales Orders** at the same time, grouped by Status. These steps assume that the **Orders** you want to **Invoice** have flowed (in 1 way or another) to the **To Invoice & Dispatch** subsection on the **Shipping & Receiving** screen.

Steps

1. Click **Warehouse** > **Shipping & Receiving** > **To Invoice & Dispatch**. This will display all **Sales Orders** where the Status = **"To Invoice & Dispatch"**.

   > **NOTE**: The **Sales Order** statuses are user definable. It is possible that your company has a different name for **To Invoice & Dispatch**.

2. Select what you want to do:

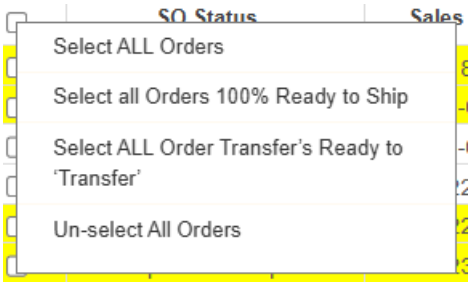
   

   NOTE: If you select **Dispatch 1 Driver** or **Dispatch All Drivers** you will have to select a **Driver Name** and click the button to create a **Dispatch #**.

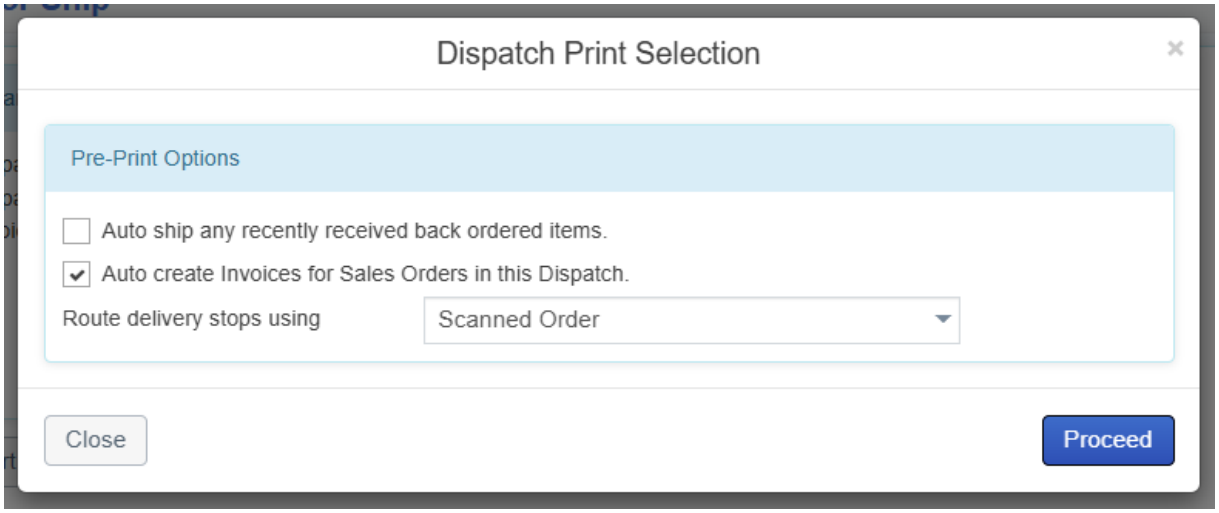
3. Select the **Sales Order(s)** you want to (batch) convert to an **Invoice**. You can do this using any of the following methods:
   a. Click the checkbox (on the left side) 1 Sales Order at a time,

b. Or, Position the cursor in the Find Order field and hand type (or scan) each desired Sales Order #.

c. Or, click the [ ] checkbox (at the top of the check column) and select any of the following options:



4. Click the green **Proceed** button. This will display the **Dispatch Print Selection** popup window.



5. Select **Auto create Invoices for Sales Orders in this Dispatch**.
   Note: If you have any 'special order' items that have arrived on a **Sales Order PO** that have not already been received AND shipped, you can click the **Auto ship any recently received back ordered items** option as well.
6. Click Proceed. This will display the Print Dispatch Documents screen.
7. Then click **Print & Update Status**. This will:
   a. Create a batch of **Invoices**.
   b. Print the batch of **Invoices**.
   c. Change the status of each **Sales Order** in the batch to the next Status (which is usually **In Route**).
   d. Insert the **Invoice #** on the **Sales Order** and insert the **Sales Order #** on the newly created **Invoice**.