

# TaiRox Productivity Tools User Guide

## Summary - Invoice Shipments

Invoice Shipments eliminates the time-consuming steps involved in invoicing Order Entry shipments from the Sage 300 Order Entry applications. The time-saving is significant for businesses that create all invoices at the end of a day from a large number of shipments. A key feature - the ability to control the invoice date - is provided for businesses that ship at the end of a day and invoice the following day with the previous day's date. There are several options when choosing to consolidate shipments into invoices. Invoice Shipments provides the ability to quickly print a number of order-related forms, without navigating to another window.

In many business situations the process of shipping an order and invoicing the shipment is a 2 step process. A shipment is created from an order, and once the order has shipped an invoice is created. The 2 step process can be very time consuming as each shipment must be called up in the Order Entry Invoices application and then invoiced. Invoice Shipments allows you to select from a set of shipments to invoice.

## Overview - Invoice Shipments

Invoice Shipments selects Order Entry shipments with the exact mechanisms used by Sage 300 core applications when printing reports. Filtering by location is also available. After selection, the selected shipments can be "cherry-picked" for invoicing. Pressing a Process button completes the operation in one-step.

**Important Note:** Invoice Shipments will either create a separate invoice for each selected customer shipment or create a single invoice for all selected customer shipments or create a single invoice for all customer shipments on a particular date.

**Important Note Re Credit Limits:** If shipping orders would cause a customer to go beyond their credit limit and you wish the limit to be overridden, an option is provided to enter the name and password of a user with the rights to override this limit.

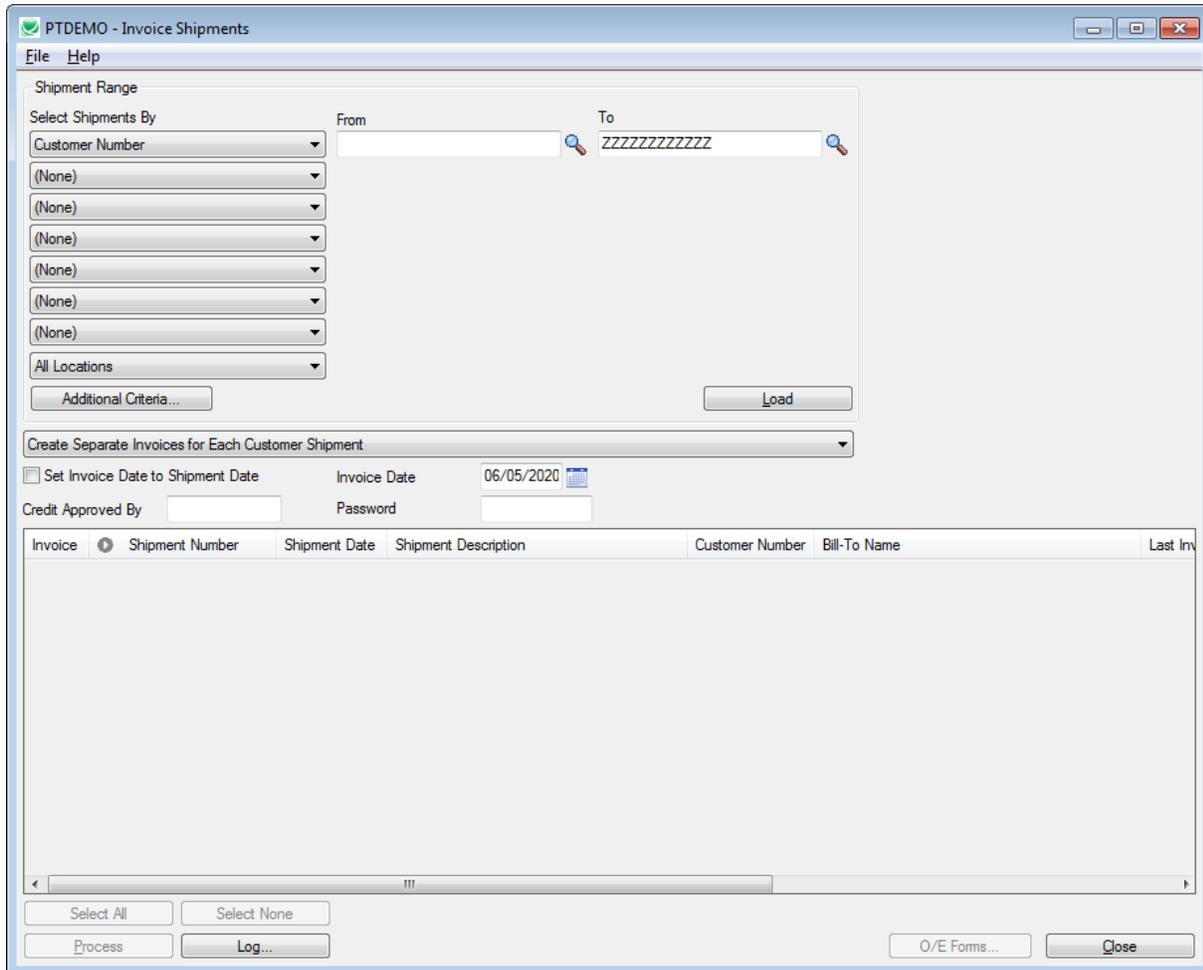
## Running Invoice Shipments

Once the TaiRox Productivity Tools are installed and activated, the Invoice Shipments icon will be shown from the TaiRox Productivity Tools menu on the Sage 300 desktop (and can be copied to other menu locations).

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## Running Invoice Shipments (continued)

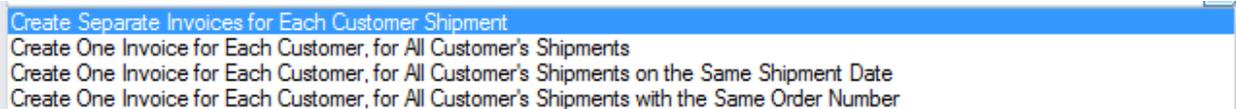
Launching the program will present a screen that allows you to select shipments that can be invoiced using various ranges:



### Note:

- The Locations drop-down provides a means to filter by a specific location. This means that orders, any of whose detail lines match the specific location are selected. Also note that shipments cannot be partially invoiced, so all detail lines will be invoiced - whether or not they are for a specific location.

Four consolidation choices are available:



When a range of Shipment Dates is used, the default values are controlled by settings accessed through the File menu:



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## Running Invoice Shipments (continued)

When the Load button is pressed, the shipments that match the selection criteria will be displayed, with full drill-down support:

Invoice No	Shipment Number	Shipment Date	Shipment Description	Customer Number	Bill-To Name	Last Inv
	SH00000000000000000000...	6/5/2020		1200	Mr. Ronald Black	

The shipments to invoice can be selected / de-selected on an individual basis. If different from the current session date, the invoice date can be changed. The Process button will now complete the process. **Important Note:** Before pressing the Process button, review the "Create Separate Invoices for Each Customer Shipment" checkbox. This determines, for example, whether you get 5 invoices for a customer (1 for each of 5 shipments) or 1 invoice for that customer (for all 5 shipments). This setting is remembered from session to session. A warning message will be displayed after pressing the Process button.

Clicking on the O/E Forms button pops-up a window, so that you can select a form to print using the Sage 300 printing functions.

Order Number	<input type="text"/>	Print Order Confirmation...
Shipment Number	SH00000000000000000062	Print Picking Slip...
Invoice Number	<input type="text"/>	Print Invoice...
		Close