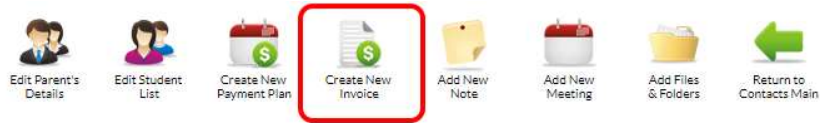




Create Invoice

Navigate to the Contact record of the prospect. Select 'Create New Invoice'.



1. Select Date of the Invoice. Be sure this reflects the month of Sale. Change 'On The Fence' invoices to the month in which you receive the first payment.
2. Enter the Item – see page 4 for valid selections
3. Enter the Unit Cost for the full amount of the package. This should always be the base price for your area. Do not net out discounts.
4. Enter a Qty of at least 1
5. If paid in full, leave blank. If paid on terms enter three lines
 - a. Total of Invoice
 - b. Down payment amount
 - c. Number of Payments, Amount and Start Date
6. Select Save Invoice

Edit Invoice Statement

John Snow
123 Main St
Lexington, KY 40502

Invoice number: 000036
Date of issue:
Discount: %
Currency: [USD] US dollar

Item	Description	Unit cost	Qty	Tax	Line Total
<input type="text" value="2"/>		<input type="text" value="3"/>	<input type="text" value="4"/>		

[Add line](#) [Import Time Tracker hours](#)

Invoice total: 0.00
Paid to date: -0.00
Balance (USD): \$0.00

Terms (Set my default terms):

Notes visible to contact:



*Don't use Discount Percentage. If a discount is required, enter a new line with the Item Discount (see Item Discount classifications on Page 4 – only use these designations). Enter the Unit Cost as a Negative amount. Enter a Qty of 1.

Edit Invoice Statement

Eddard Stark
123 Main Street
Winterfell, KY 11111

Invoice number: 000038
Date of issue: Jun 30, 2018
Discount: 0 %
Currency: [USD] US dollar

Item	Description	Unit cost	Qty	Tax	Line Total
Freshman Package		3199	1		3199.00
Payment Plan		99	1		99.00
Additional Child Discour		-150	1		-150.00

Invoice total: 3,148.00
Paid to date: -0.00
Balance (USD): \$3,148.00

Terms (Set my default terms)
Invoice Total = \$3,148
Downpayment = \$799
23 Payment at \$100; 1 Payment at \$49; Start Date 8/1/2018

Notes visible to contact

Buttons: Add line, Import Time Tracker hours, Cancel, Delete Invoice, Save Invoice

When the invoice is Saved, it will have a status of 'Created'

Invoice

CREATED

Class 101
245 Regency Circle
Lexington, KY 40503

Eddard Stark
123 Main Street
Winterfell, KY 11111

Invoice # 000038
Invoice date Jun 30, 2018
Amount due \$3,148.00

Item	Description	Unit cost	Quantity	Line total
Freshman Package		3,199.00	1	3,199.00
Payment Plan		99.00	1	99.00
Additional Child Discount		-150.00	1	-150.00
Total				3,148.00
Amount paid				-0.00
Amount due (USD)				\$3,148.00

Terms
Invoice Total = \$3,148
Downpayment = \$799
23 Payment at \$100; 1 Payment at \$49; Start Date 8/1/2018

Buttons: Print, PDF, Email Invoice, Enter a Payment, Edit Invoice, Done / Close



Invoice Examples:

Simple Invoice, Single Line:

Edit Invoice Statement

Eddard Stark
123 Main Street
Winterfell, KY 11111

Invoice number: 000039
Date of issue: Jun 30, 2018
Discount: %
Currency: [USD] US dollar

Item	Description	Unit cost	Qty	Tax	Line Total
Freshman Package		3199	1		3,199.00

Invoice total: 3,199.00
Paid to date: -0.00
Balance (USD): \$3,199.00

Terms (Set my default terms):
Notes visible to contact:

Cancel Delete Invoice Save Invoice

Invoice with Discount:

Edit Invoice Statement

Eddard Stark
123 Main Street
Winterfell, KY 11111

Invoice number: 000039
Date of issue: Jun 30, 2018
Discount: %
Currency: [USD] US dollar

Item	Description	Unit cost	Qty	Tax	Line Total
Freshman Package		3199	1		3,199.00
Courtesy Discount		-100	1		-100.00

Invoice total: 3,099.00
Paid to date: -0.00
Balance (USD): \$3,099.00

Terms (Set my default terms):
Notes visible to contact:

Cancel Delete Invoice Save Invoice

Invoice with multi-lines:

Edit Invoice Statement

Eddard Stark
123 Main Street
Winterfell, KY 11111

Invoice number: 000039
Date of issue: Jun 30, 2018
Discount: %
Currency: [USD] US dollar

Item	Description	Unit cost	Qty	Tax	Line Total
Freshman Package		3199	1		3,199.00
Sports Package		499	1		499.00
Payment Plan		99	1		99.00

Invoice total: 3,797.00
Paid to date: -0.00
Balance (USD): \$3,797.00

Terms (Set my default terms):
Invoice Total = \$3,797
Downpayment: \$799
19 Payments at \$150; 1 Payment at \$148; Starting 8/1/18

Notes visible to contact:

Cancel Delete Invoice Save Invoice



Item Classification

Use these item classifications spelled out and typed in this **EXACT** manner:

ACT Class	Miscellaneous
ACT Sessions	Payment Plan
College Trip	SAT Class
Disc Assessment	SAT Sessions
Extended Package	Senior Package
Freshman Package	Seventh Grade Package
Eighth Grade Package	Sophomore Package
Junior Package	Sports Package

Discount Item Classifications

Use these discount item classifications spelled out and typed in this **EXACT** manner:

Additional Child Discount	End Of School Year
Referral Fee	Courtesy Discount