Set-up Delivery Codes as used on Invoices

Overview:

This process will enable the user to add a delivery charge directly to an invoice rather than an order. It is particularly useful when freight is not included on a production or client order that has already been despatched. *Note: Ensure that the export codes are already in MYOB or QuickBooks to enable successful exporting.*

Create a dummy material <u>or</u> part code for freight charges, if one has not already been created. The code created for use for the 'Freight' account may also be used for this code.

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Click on *'Invoicing'* on the top Toolbar and select the Invoicing Parameters icon from the bottom of the menu.

File	HOME	CONTACTS	RESOURCE	INVENTORY	QUOTES	PURCHASING	G ORDERS	JOBS/SCHEDULI	NG INV	OICING
New	Save Clipboard	Copy	Create Invoice	Edit Invoice	Invoice atch	voice To Do	myob Export-MYOB Export	Export-XERO	Tota Set Utilities	• • •

Type the word FREIGHT in the field as shown below and **press** <F9> to save.

Parameters - Invoid	
General Print Order Conf Pro Forma Point of Sale	
 [2] Popup - Selected Invoice No Order [2] C.O.D & Active & Account Code (Disabled) [2] Despatch Date , Select Date [2] No def Export Name (Clients, Suppliers) [3] Two Fields , One Field , Description Only [2] Despatch Amount greater then \$0 [2] Print extra Part Description [2] Print extra Part Description [2] Use Cust Part Code for Invoice Add Surcharge and Delivery to Invoice Surcharge: Delivery: FREIGHT Discount: 	Default Tax Code: 2 Last Created Invoice No: 2051 Create No Invoice for ITMS Use Production Order Type No Stock Financial Year Start: July 2 (2) Category Discount/Factor 2 (2) Factor, Discount (2) Early Discount (2) Use Multiple Companys (2) Use Multiple Companys (2) Use Warehouse (2) Reserve All Stock Factor SQM (for Plastic):
Invoice Type Select or Auto Selected One Delivery Docket per Order Multiple Delivery Dockets for each Order per Invoice Multiple Orders per Invoice Rebuild Index for Despatch Order (Invoice) [3] Invoice Costed Orders Only, Costed Despatch Only Use "R" for Ready to Invoice Use Claim (PRD) Use Claim (CLT)	Div Division Name Alt Def Bin 1 COMPANY ONE

Now when the USER selects the *Delivery* button on an invoice a message pops-up (See below), **click** on **Yes**. You will then be prompted to save changes to the entry, **click** on **Yes** again.

File HOME CONTAC	TS RESOURCES INVENTORY	QUOTES PURCHASIN	IG ORDERS J	OBS/SCHEDULING	INVOICING	QUALITY MA
New Save Clipboard Copy	Create Invoice Create Invoice Invoice	Invoice To Do	myob Export-MYOB Export	Export-XERO	ata Set 👻 tilities 👻 pecials 👻	
Invoice No: 2063	Client Code:	Invoice		Invoice	e Printed/Emailed	3
Details More Invoice Date: 14/10/2014 Date Created 14/10/2014 Claim 1 No Details 1 1 2 5000 3 3 5 5 6 6 \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	Client Order No: Poice BM002323 ABN: 992938 Notes 571 571 571 571 571 571 571 571 571 571 571 571 571 571 571 571 571 70017	Shipping A Badger M Continue? ry to this invoice, this second must upon completion of this operation made to the record will be lost. to continue? Yes No (Ex) \$22,608.10	ddress: ining Pty Ltd : be closed. It will : do not save changes,] Tax \$2,260.	Price Disc 20.0000 Disc 20.0000 Disc 30.5000 Disc 95.5000 Disc 95.6000 Disc 95.6000 Disc 95.6000 Disc 95.6000 Disc 95.6000 Disc 81 Total (Inc)	4824 Total Price Ta 17280.00 6 240.00 6 240.00 6 382.00 6 4560.00 6 \$24,868.9 \$24,868.9	X

The 'Delivery Charge' pane appears, enter the delivery amount (ex GST) and click <u>OK</u>.



The delivery code and amount has been added to the invoice.

Inv	ice					x
Invoice No: Client Code: 2063 BEAVER Details More Info				Invoice	Printed/Emaile	ed
Invoice Date: Client Order No: 14/10/2014 PO: BM002323	Shipping Address: Badger Mining Pty Ltd					
Date Created: ABN: Int No: Div 14/10/2014 99 229 339 944 1	ion: 12 Old Quarry Road					
Claim Notes Size Cost Acc	CLONCURRY			QLD	4824	
No Desp Part Code 1 1 50065/1 ZXYW100 Part 1 INV NSTK Or 2 2 50065/1 ZXY200 Part 2 INV NSTK Or 3 3 50065/1 OPTO01 Material 2 INV NSTK 4 4 50065/1 AB02001111 Material 3 INV STK 5 50065/1 OPTO1711111 Heavy Duty Rim 17i 5 5 50065/1 WXY2200 Part 2 INV (STK Or 7 7 50065/1 FREIGHT FREIGHT CODE	Vescription Material & WC1 Sub-Part & WC1 use and buy each ed by meter buy in Lengths th Interial & WC1	Qty 60 1 60 2 4 20 1	Unit Price 320.0000 30.5000 4.0000 57.8000 95.5000 160.0000 97.0000	Disc 10.00 .00 .00 .00 .00 5.00	Total Price 17280.00 30.50 240.00 115.60 382.00 4550.00 97.00	Tax 6 6 6 6 6 7

Press <F9> to save.