



FACT SHEET



Clever Invoicing Enhancements

Making invoicing more flexible

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Invoicing made more flexible with Clever Invoicing Enhancements

Product Overview

Clever Invoicing Enhancements provides flexibility to let you choose when and how your invoices are generated. The app includes functionality that allows you to set up rules to control whether you consolidate Orders/Shipments into a single invoice or if you send an invoice for each Sales Order, allowing you to meet commercial agreements you might have in place. Easily define how invoices are to be created for each customer and generate invoices as and when required. Start using Clever Invoicing Enhancements today and make your invoicing process more streamlined and less reliant on manual data consolidation.

Benefits

- Consolidate multiple shipments onto a single invoice
- Use the job queue to streamline your invoicing process
- No reliance on manual data input

Requirements

Dynamics 365 Business Central

Are you having to manually consolidate shipments into invoices?

With the automation functionality within Clever Invoicing Enhancements, you'll never miss an invoice. Plus, it removes the need for you to spend time organising multiple invoices. Choose the frequency with which you invoice your customers, set the consolidation method and let the system do the rest.



One Invoice, per Order or per Shipment

With Clever Invoicing Enhancements, you can choose to consolidate invoices Order by Order or Per Shipment. By choosing to invoice Per Shipment, you can ensure that your customer will receive an invoice for each delivery they receive regardless of whether the shipment included items from separate orders. If using the Per Order method, an invoice will be created for each order shipped since the previous invoicing period.



Scheduled Invoicing

Invoice Consolidation

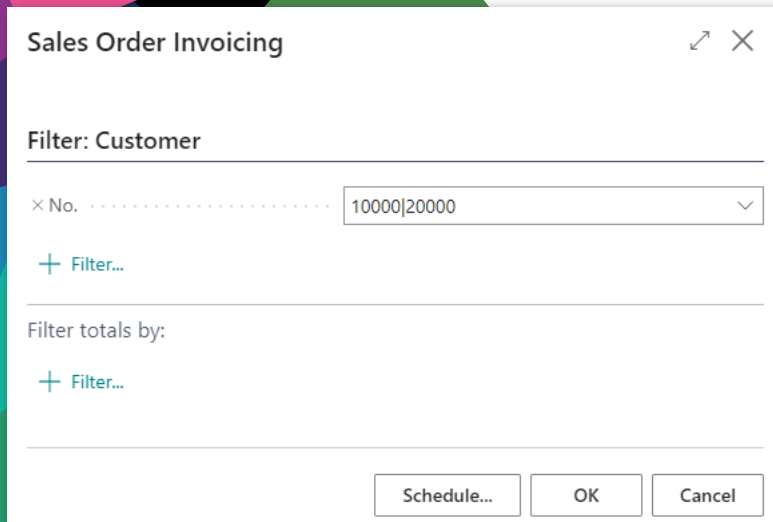
Invoice Frequency

Last Invoiced Date

Order by Order
Per Shipment

Create one invoice for multiple shipments, from multiple sales order

Using the Shipment Consolidation method, Clever Invoicing Enhancements will create one invoice for multiple shipments, regardless of how many sales orders were shipped. A single invoice for all shipments, working alongside the Invoicing Frequency rules will make your invoicing process more efficient and help to reduce the risk of missing shipments from an invoice.



Sales Order Invoicing

Filter: Customer

× No. 10000|20000

+ Filter...

Filter totals by:

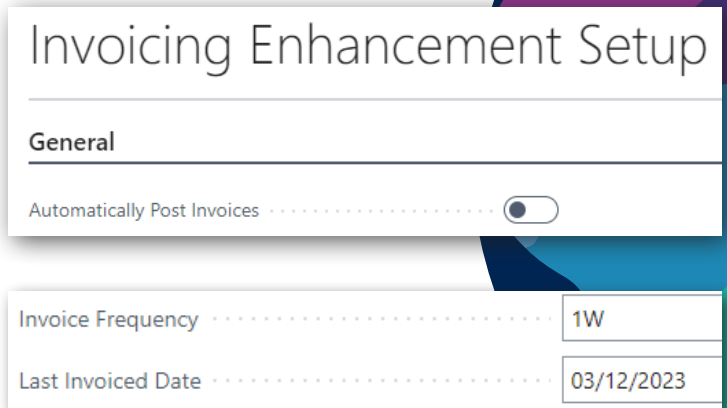
+ Filter...

Schedule... OK Cancel

Set up invoice frequency for a more efficient invoicing process

Using Clever Invoicing Enhancements you can set up invoice frequency periods against customers and batch create invoices. Simply select the frequency customers require for their invoices, such as weekly or bi-weekly and let the system track the rest.

For even more streamlined invoicing your finance team can also batch create invoices and automatically post them via the job queue within Microsoft Dynamics 365 Business Central when used in conjunction with the invoice frequency feature, saving tons of time and eliminating manual errors.



Invoicing Enhancement Setup

General

Automatically Post Invoices

Invoice Frequency 1W

Last Invoiced Date 03/12/2023

Make light work of your invoicing with Clever Invoicing Enhancements by streamlining the process of invoicing.



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