Auto Invoice Shipments

# User Guide

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1   Overview

Auto Invoice Shipments provides the following functionality:

- Invoice multiple shipments at the same time.
- Consolidate multiple shipments into one invoice per customer.
- Pick individual shipments to be invoiced or invoice all outstanding shipments.
- Optionally print the invoices as they are created.
- Schedule the invoicing and printing to happen automatically.

2   Invoicing Outstanding Shipments

The following figure shows an example of the main screen of the application.
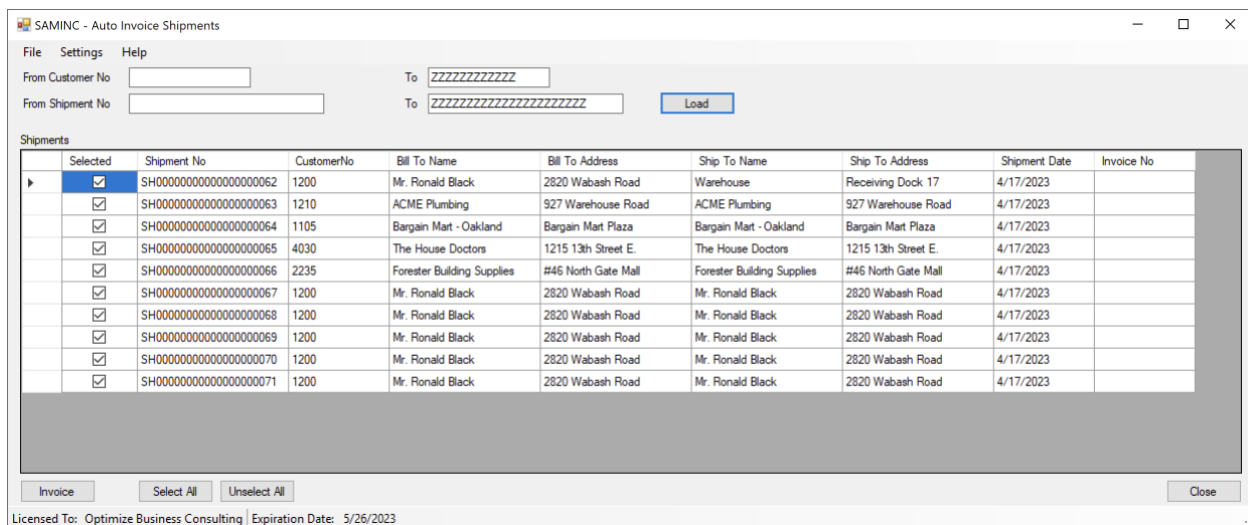
The outstanding shipments can be limited by a range of customer numbers and a range of shipment numbers. Clicking the Load button shows all matching shipments in a list. By default, all shipments are selected for invoicing, but you can individually unselect some of the shipments if you don't want them to be invoiced. Also, Select All and Unselect All buttons are available.

Once ready, click the Invoice button and all selected shipments will be invoiced. Optionally, invoices can be printed at the same time. See the Settings section for more details.
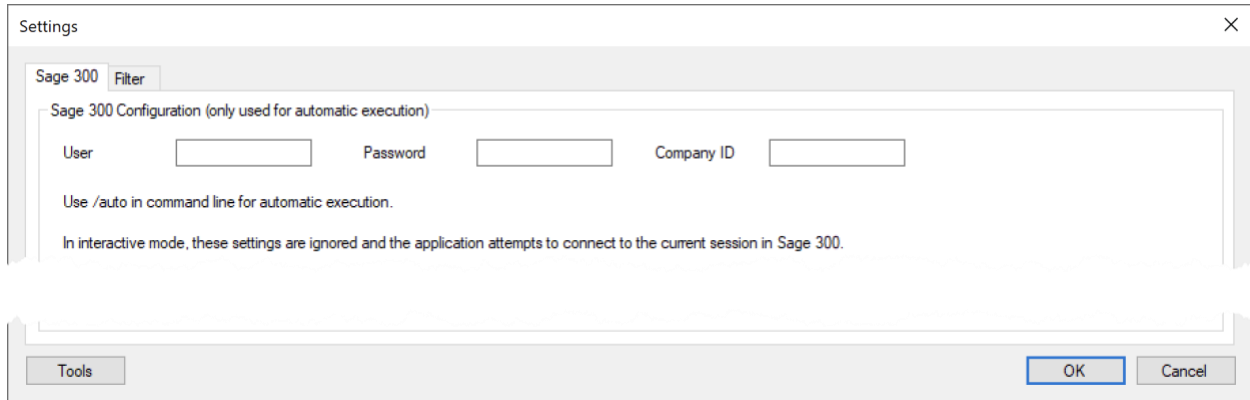
3   Settings

The Settings screen (accessible through the Settings menu) is used for the following:

1. Configure unattended execution.
2. Configure consolidation and printing.
3. Configure additional charges.
4. Configure additional filters.

3.1   Unattended Execution

You can schedule the application to automatically create invoices (and optionally print them). For unattended execution, you need to provide Sage 300 user name, password and company ID in the Settings screen.
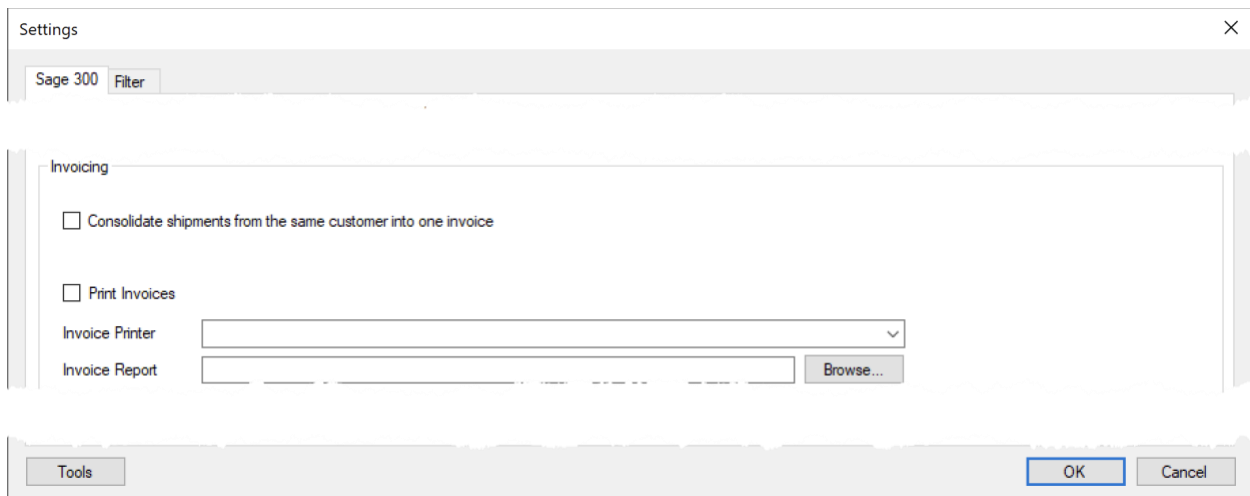

Once the configuration is done, use the Windows Task Scheduler to create a scheduled task to run Auto Invoice Shipments application and provide "/auto" as the command line parameter. All outstanding shipments matching the filter (see below) will be invoiced.

3.2   Consolidation and Printing Invoices

To consolidate shipments into one invoice per customer, select the "Consolidate shipments from the same customer into one invoice" checkbox.

In order to auto-print invoices, select the "Print Invoices" checkbox in the Settings and specify the printer name and the RPT file name to be used.

3.3   Additional Charges

The application can be configured to automatically add miscellaneous charges to invoices created. Optionally, the amounts can be confirmed and manually modified by the users before invoice is posted.

The charges can be configured to be applied to all customers, or different customers can have different configuration.

To have the same charges to be added to all customer invoices, select the "Use the same configuration for all customers" option as shown below.

Then, specify what miscellaneous charges need to be added to invoices, and how to calculate the amount. The amount is based on the invoice subtotal, and you can specify a percentage, plus a fixed amount. The total of the two is the miscellaneous charge amount. In the above example, charge code A1 is calculated as 1 percent of the invoice subtotal, plus $10.

If the "Prompt to Confirm Amount" is selected, the application lets you review and override the amounts before invoice is posted. This happens for each invoice separately.

To specify different charge configuration for different customers, unselect the "Use the same configuration for all customers" option. The screen changes as shown below.
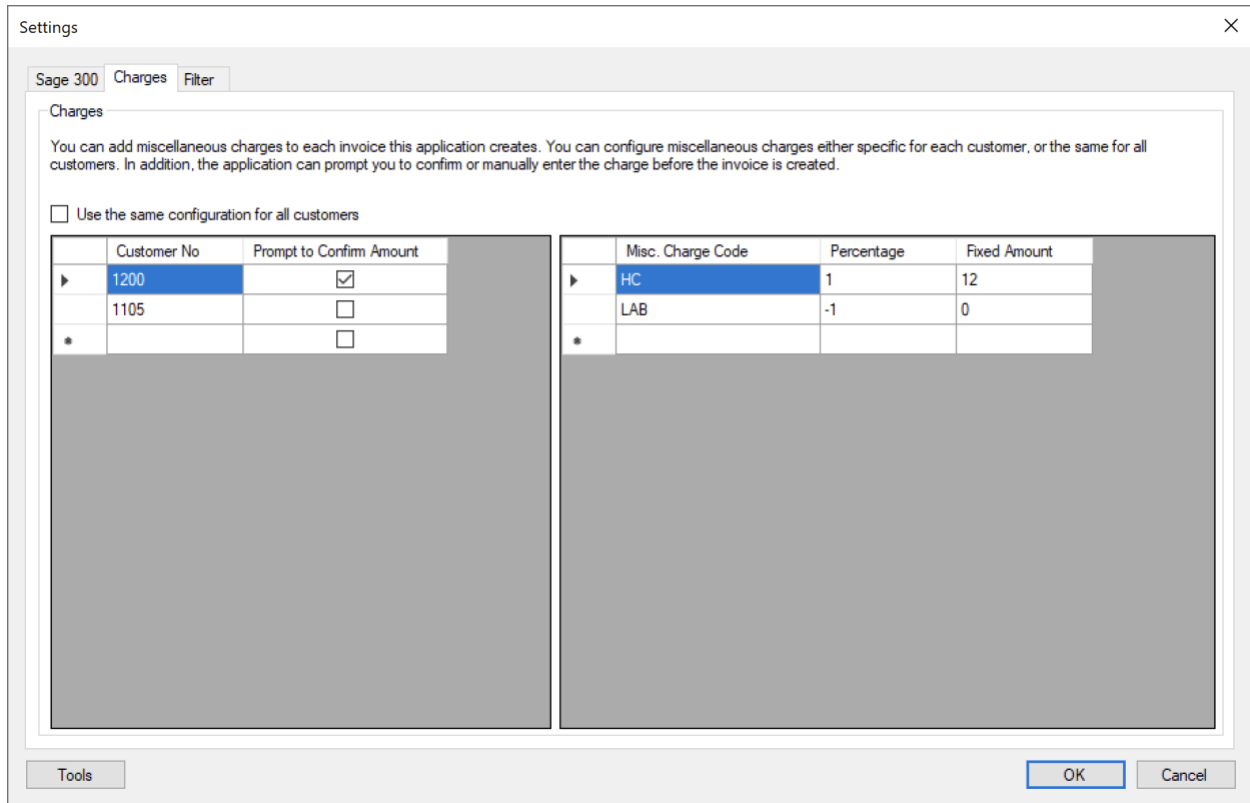
The customers are listed on the left side, and the right side is the charges for the selected customer. Different customers can have different charges.

3.4   Filter Shipments

By default, all shipments that have not been invoiced yet are included. However, you can specify additional filters using the Filter tab of the Settings screen.
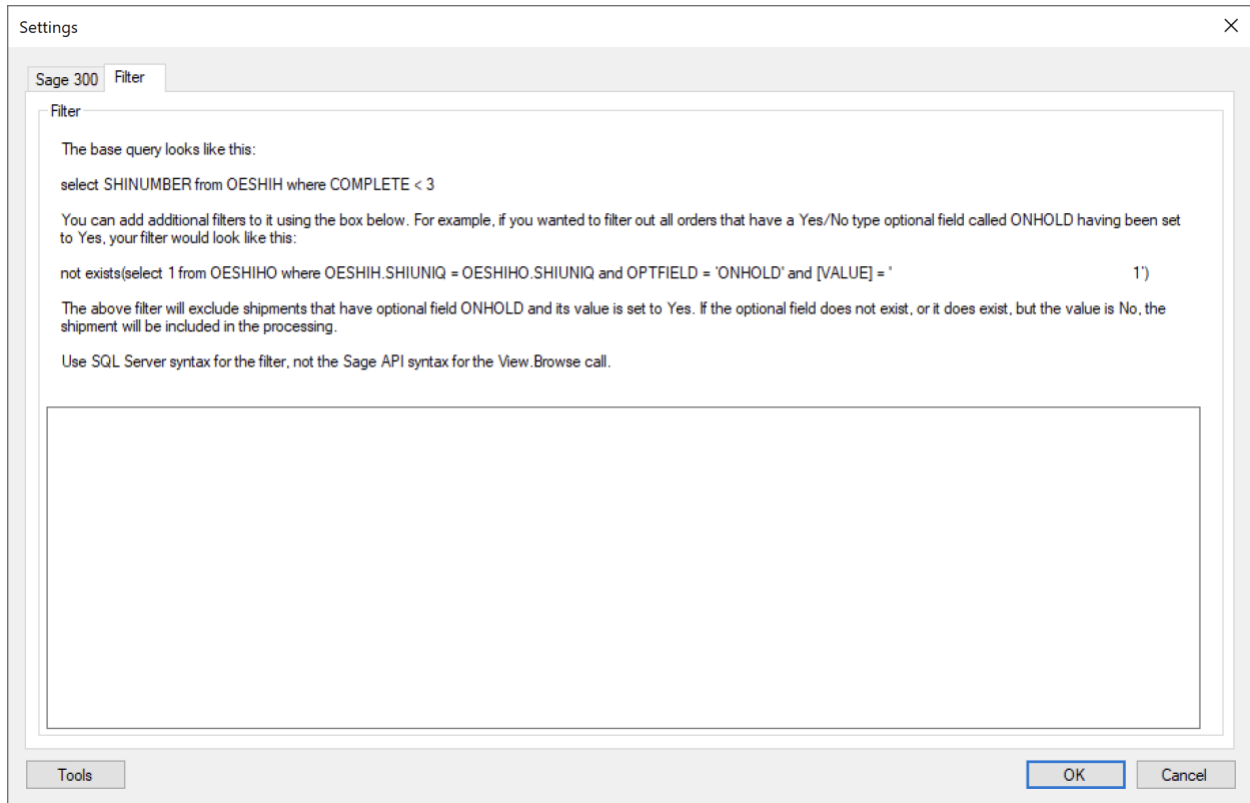
The screen provides an example of a filter that checks an optional field on the shipment header level, but you could also filter by any field on the header. The filter must conform to the SQL server syntax for the WHERE clause of the SQL SELECT statement.

4   Technical Requirements

The application is designed to work with Sage 300 version 2018, 2019, 2020 or later. It requires .NET Framework version 4.8. If required version of .NET Framework is not present on the target computer, you will be prompted to download it and directed to appropriate Microsoft web site.