

Create a Miscellaneous Invoice from a Customer Record

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To create a Miscellaneous Invoice beginning from a Customer Explorer record, follow the instructions below.

1. Open the Customer Explorer for the customer you wish to create a miscellaneous invoice.
2. From the Customer Tree select the Invoices option, right-click and select New Invoice.
3. Once the blank Invoice Form is displayed, fill in the form.
4. Fill in the Invoice Header – Fill in the necessary fields of the invoice header as described in [Miscellaneous Invoice Form Definitions](#).
5. Invoice Body - Select Items and/or Parts – If invoicing the customer for Items, select the item and enter the quantity and rate. If the Item selected is for a recurring type of service, a form will be displayed to enter the period of time for which the Item is being invoiced along with the billing cycle and monthly rate. Continue to the next Item line for additional Items being invoiced.
If invoicing the customer for Parts, navigate to the Parts tab and either type in the exact part number or click the part search button located in the right of the Part field. Enter the quantities and rates. Continue to the next Part line for additional Parts being invoiced.
6. Invoice Footer – Select the Invoice Description from the drop-down list. The Contact Name field is optional. If a name is manually typed into this field or a Contact Name is selected from the drop-down list, this name will print on the customer invoice. In the Memo field the User may type up to 256 characters of information that will print on the customer invoice.
7. Post the Invoice – When finished filling in all required information, click the Save button located at the lower right of the invoice form. Clicking the Save button will post the invoice to the General Ledger and appear on the customer invoice list within the Customer Explorer.

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