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# Sage 100 Tip:

Create a Single Invoice for Multiple Sales Orders in Sage 100



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## Create a Single Invoice for Multiple Sales Orders in Sage 100

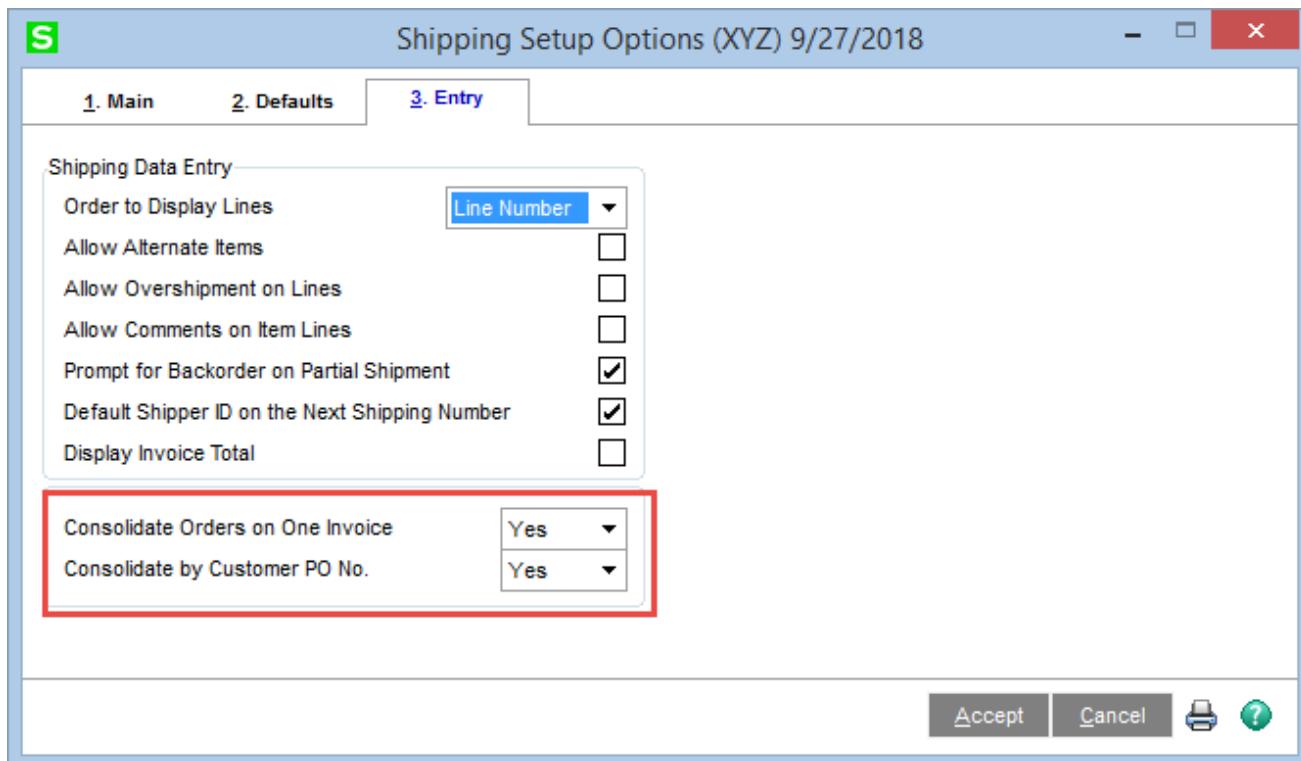
### New in Sage 100 Version 2018.4 - Multiple Customer Sales Orders on a single shipment

An enhancement in Shipping Data Entry now allows multiple Customer Sales Orders on a single shipment\invoice. Let's look at this new enhancement.

#### Setup Consolidation Options

##### 1. Consolidate Orders on One Invoice

First, the consolidation feature must be enabled in **Shipping Setup Options**.



Select an option to determine whether multiple orders for the same customer are consolidated into one invoice as the orders are processed in **Shipping Data Entry**.

- Select No to create a separate invoice for each order.
- Select Yes to automatically consolidate the orders into one invoice.
- Select Prompt to have a message appear asking if an order should be added to an invoice.

If there is more than one existing invoice for the customer, the program selects the first available invoice.

**Note:** To consolidate multiple orders, the values for the fields listed below must be the same for each order. The first order selected is considered the primary order and is used to determine if additional orders are valid. Note that some fields may not be available depending on your settings.

- Terms code
- Ship-to code
- Discount rate
- Sales tax schedule

- Salesperson (or salespersons) and commission rate(s)
- Job number (If Job Cost is integrated)
- Ship-via shipping code and shipping zone
- Bill-to customer
- ACH payment ID (The ACH payment IDs must match, or you can combine with an order that has no payment ID.)
- RMA number
- CRM person ID, CRM company ID, and CRM opportunity ID (If Sage CRM is integrated)

## 2. Consolidate By Customer PO No.

Select an option to determine whether orders with different customer purchase order numbers are consolidated into one invoice.

- Select Yes to consolidate orders into one invoice only if the purchase order number is the same.
- Select No to consolidate orders with different purchase order numbers into one invoice.
- Select Prompt to have a message appear asking if an order should be added to an existing invoice when the purchase order numbers are different.

**Note:** This field is available if Yes or Prompt is selected in the Consolidate Orders on One Invoice field.

## Process Multiple Orders on One Invoice.

### 1. Consolidate Multiple Orders with Different PO numbers.

**Note:** For this example, the Consolidate by Customer PO No. option on Tab 3. **Entry** must be set to either No or Prompt.

The dialog box is titled "Shipping Setup Options (XYZ) 9/27/2018". It has three tabs: "1. Main", "2. Defaults", and "3. Entry". The "3. Entry" tab is selected. The "Consolidate Orders on One Invoice" dropdown is set to "Yes" and the "Consolidate by Customer PO No." dropdown is set to "No". Both dropdowns are highlighted with a red box. The dialog box includes buttons for "Accept", "Cancel", "Print", and "Help".

Input the first shipment in Shipping Data Entry and Accept.

Shipping Data Entry (XYZ) 9/27/2018

Shipper ID	123	Ship Date	9/27/2018	Order No.	0000013	SO Created By	###
Shipping No.	0000043	Ship Status	New	American Business Computers			
Customer No.	ABC						

**1. Lines**   **2. Shipping**

Item Code	DSKTP-00300	Ordered	Shipped	Back Ordered	Comment
1	DSKTP-00300	5.00	5.00	.00	
2	DSKTP-00200	1.00	1.00	.00	

Description	TURBO DESKTOP COMPUTER SYSTEM		
Warehouse	000		
U/M	EACH		
Package			

Quick Print   Auto Increment    **Accept**   **Cancel**   **Delete**

Sales Order No. 13 – Customer PO No. 123

Sales Order No. 15 – Customer PO No. 456

Input shipping data entry for SO 15

Shipping Data Entry (XYZ) 9/27/2018

Shipper ID	123	Ship Date	9/27/2018	Order No.	0000015	SO Created By	###
Shipping No.	0000043	Ship Status	Lines Completed				
Customer No.	ABC	American Business Computers					

**1. Lines**   **2. Shipping**

Item Code	DSKTP-00300	Ordered	Shipped	Back Ordered	Comment
1	DSKTP-00300	5.00	5.00	.00	
2	DSKTP-00200	1.00	1.00	.00	
3	DSKTP-00100	5.00	.00	.00	
4	DSKTP-00200	2.00	.00	.00	
5	DSKTP-00100	1.00	.00	.00	

Description	TOWER DESKTOP COMPUTER SYSTEM		
Warehouse	000		
U/M	EACH		
Package	0001		

\* Multiple Orders \*

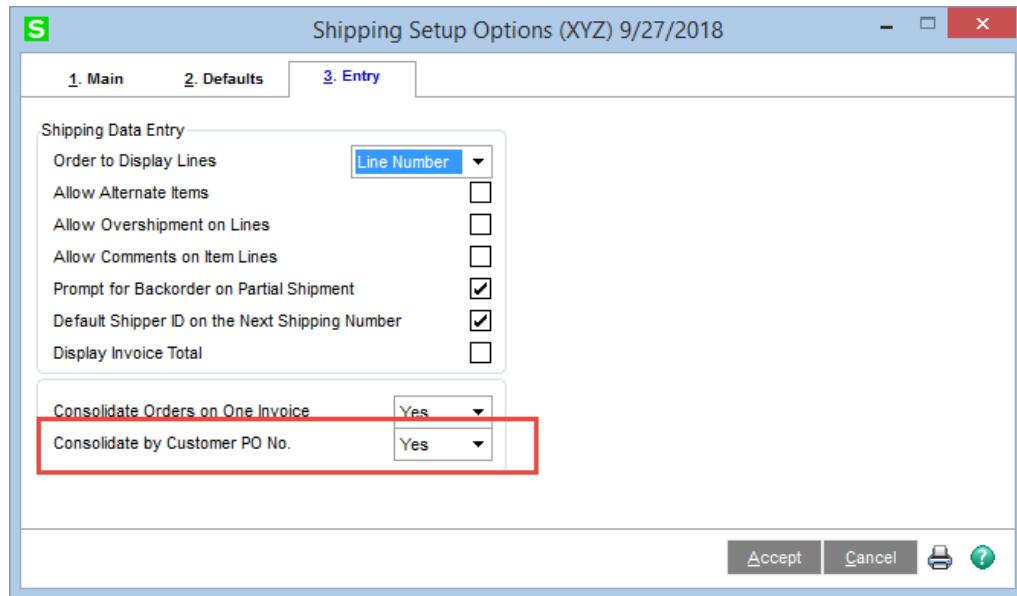
Show detail for all orders

Quick Print   Auto Increment    **Accept**   **Cancel**   **Delete**

Notice a message appears “Multiple Orders”, it has consolidated the shipment, and an option to show detail for all orders on one screen. Accept and proceed to Invoice, there are no additional steps to consolidate the invoice.

## 2. Consolidate Multiple Orders by Customer PO numbers.

**Note:** For this example, the Consolidate by Customer PO No. option on Tab 3. **Entry** must be set to either Yes or Prompt.



There will be three invoices in this example:

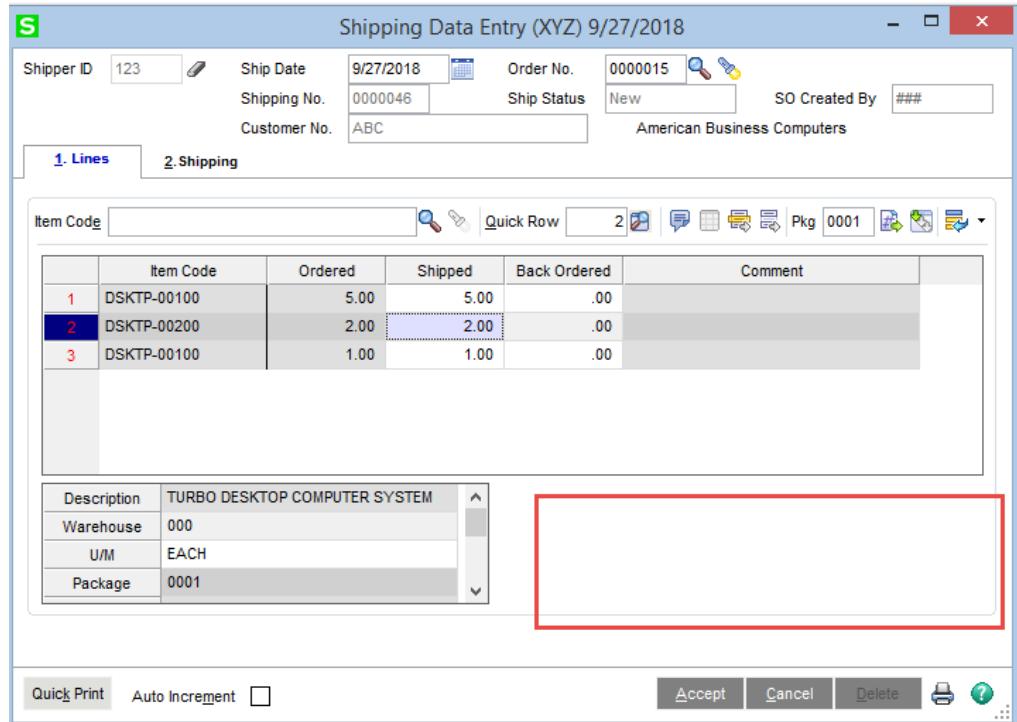
Sales Order No. 13 – Customer PO No. 123

Sales Order No. 15 – Customer PO No. 456

Sales Order No. 16 – Customer PO No. 123

Input Shipping Data for SO 13 and accept – Same as above

Input Shipping Data for SO 15 – Note that no consolidation messages or options appear since this order does not have the same Customer PO No. as SO 13



Input Shipping data for SO 16 (Customer PO 123, same as SO 13)

It has been consolidated with SO 13.

S Shipping Data Entry (XYZ) 9/27/2018

Shipper ID	123	Ship Date	9/27/2018	Order No.	0000016				
Shipping No.	0000045		Ship Status	Lines Completed		SO Created By	###		
Customer No.	ABC		American Business Computers						
<u>1. Lines</u>		<u>2. Shipping</u>							
Item Code				Quick Row	1			Pkg	0001
	Item Code	Ordered	Shipped	Back Ordered	Comment				
1	DSKTP-00300	5.00	5.00	.00					
2	DSKTP-00200	1.00	1.00	.00					
3	DSKTP-00100	1.00	.00	.00					
4	DSKTP-00200	2.00	.00	.00					
Description	TOWER DESKTOP COMPUTER SYSTEM								
Warehouse	000								
U/M	EACH								
Package	0001								

\* Multiple Orders \*

Show detail for all orders

Quick Print Auto Increment

Accept Cancel Delete

Accept and proceed to Invoice, there are no additional steps to consolidate the invoice.

### 3. Reviewing the Consolidated Invoice in Sales Order Invoice Data Entry

Notice that two invoices were created, one for each Customer PO number.

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### Invoice List

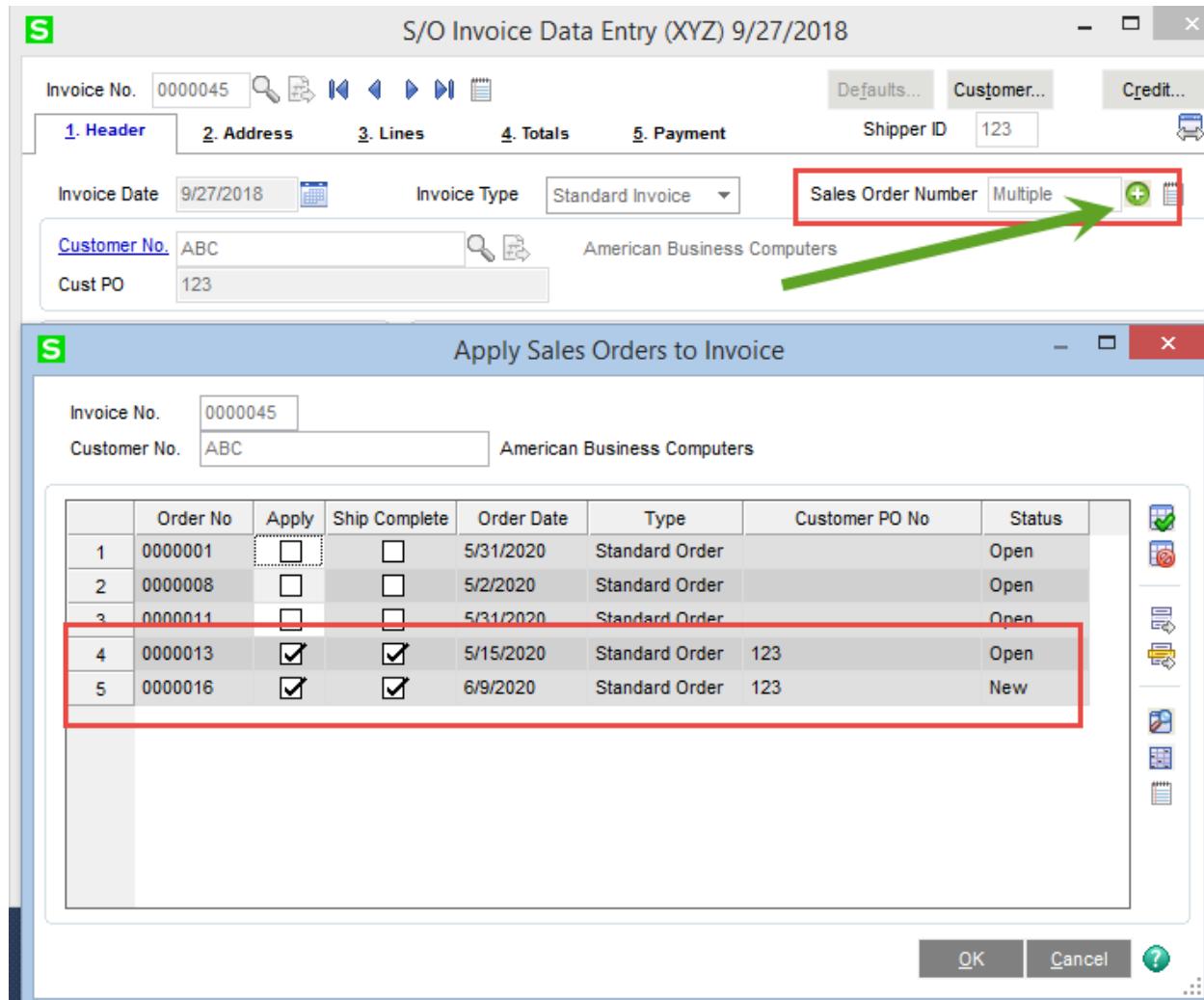
- □ X

Invoice	Inv Date	Customer No	Bill To Name	Inv Total
0000045	9/27/2018	ABC	American Business Computers	40206.08
0000046	9/27/2018	ABC	American Business Computers	22630.29

Zoom buttons have been added to display the Sales Orders that are used on the invoice.

**Note:** There is also a zoom on the Cust PO field if you consolidate multiple Customer PO numbers (Scenario 1).

Selecting the Consolidated Invoice number 45, notice the zoom next to the Sales Order Number field, which now says multiple and the new zoom button. By clicking on the zoom button, the Sales Order detail for the Consolidate Invoice is displayed.



This is a big enhancement in Product Update 4, which brings the ability to consolidate multiple Sales Orders to one shipment (invoice) in Sage 100 for the first time.

If you have any questions or would like assistance upgrading to the latest version of Sage 100, please contact our Sage 100 support team at 260.423.2414.