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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**.

Shipping Setup Options (XYZ) 9/27/2018

1. Main 2. Defaults 3. Entry

Shipping Data Entry

Order to Display Lines Line Number

Allow Alternate Items ☐

Allow Overshipment on Lines ☐

Allow Comments on Item Lines ☐

Prompt for Backorder on Partial Shipment ☒

Default Shipper ID on the Next Shipping Number ☒

Display Invoice Total ☐

Consolidate Orders on One Invoice Yes

Consolidate by Customer PO No. Yes

Accept Cancel

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 screenshot shows the 'Shipping Setup Options (XYZ) 9/27/2018' window with the '3. Entry' tab selected. The 'Shipping Data Entry' section contains several options with checkboxes or dropdown menus. The 'Consolidate Orders on One Invoice' option is set to 'Yes'. The 'Consolidate by Customer PO No.' option is highlighted with a red box and set to 'No'.

Option	Value
Order to Display Lines	Line Number
Allow Alternate Items	<input type="checkbox"/>
Allow Overshipment on Lines	<input type="checkbox"/>
Allow Comments on Item Lines	<input type="checkbox"/>
Prompt for Backorder on Partial Shipment	<input checked="" type="checkbox"/>
Default Shipper ID on the Next Shipping Number	<input checked="" type="checkbox"/>
Display Invoice Total	<input type="checkbox"/>
Consolidate Orders on One Invoice	Yes
Consolidate by Customer PO No.	No

Buttons at the bottom: Accept, Cancel, Print, Help.

Input the first shipment in Shipping Data Entry and Accept.

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

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

**1. Lines** **2. Shipping**

Item Code: Quick Row: 2 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	

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

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

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

**1. Lines** **2. Shipping**

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	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

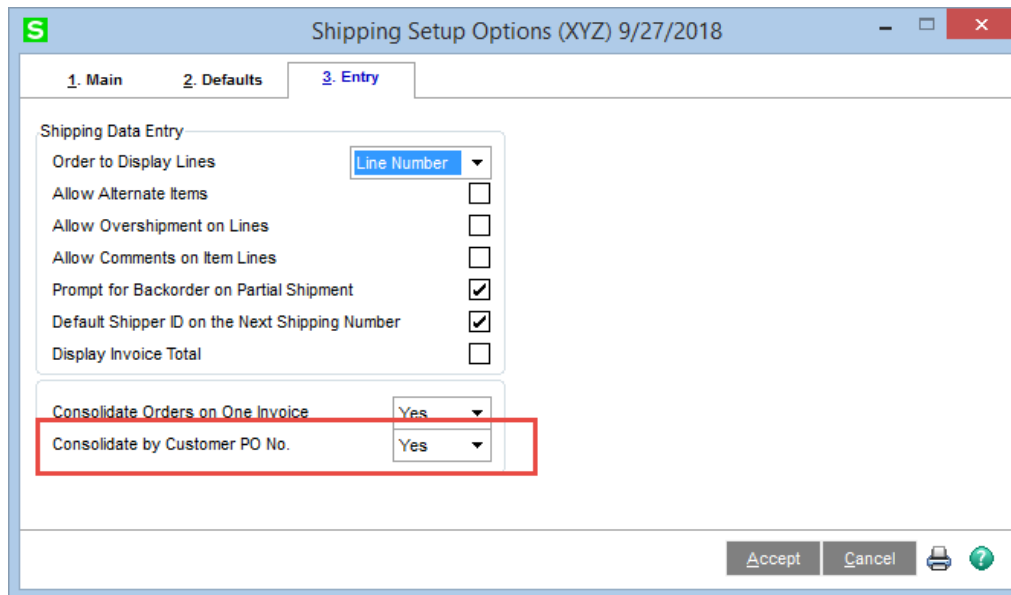
**\* Multiple Orders \***  
☒ Show detail for all orders

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.



The screenshot shows the 'Shipping Setup Options (XYZ) 9/27/2018' window. It has three tabs: '1. Main', '2. Defaults', and '3. Entry'. The '3. Entry' tab is selected. Under 'Shipping Data Entry', there are several checkboxes: 'Order to Display Lines' (set to 'Line Number'), 'Allow Alternate Items' (unchecked), 'Allow Overshipment on Lines' (unchecked), 'Allow Comments on Item Lines' (unchecked), 'Prompt for Backorder on Partial Shipment' (checked), 'Default Shipper ID on the Next Shipping Number' (checked), and 'Display Invoice Total' (unchecked). Below these, there are two dropdown menus: 'Consolidate Orders on One Invoice' (set to 'Yes') and 'Consolidate by Customer PO No.' (set to 'Yes'). These two dropdowns are highlighted with a red rectangle. At the bottom right, there are buttons for 'Accept', 'Cancel', a printer icon, and a help icon.

There will be three invoices in this example:

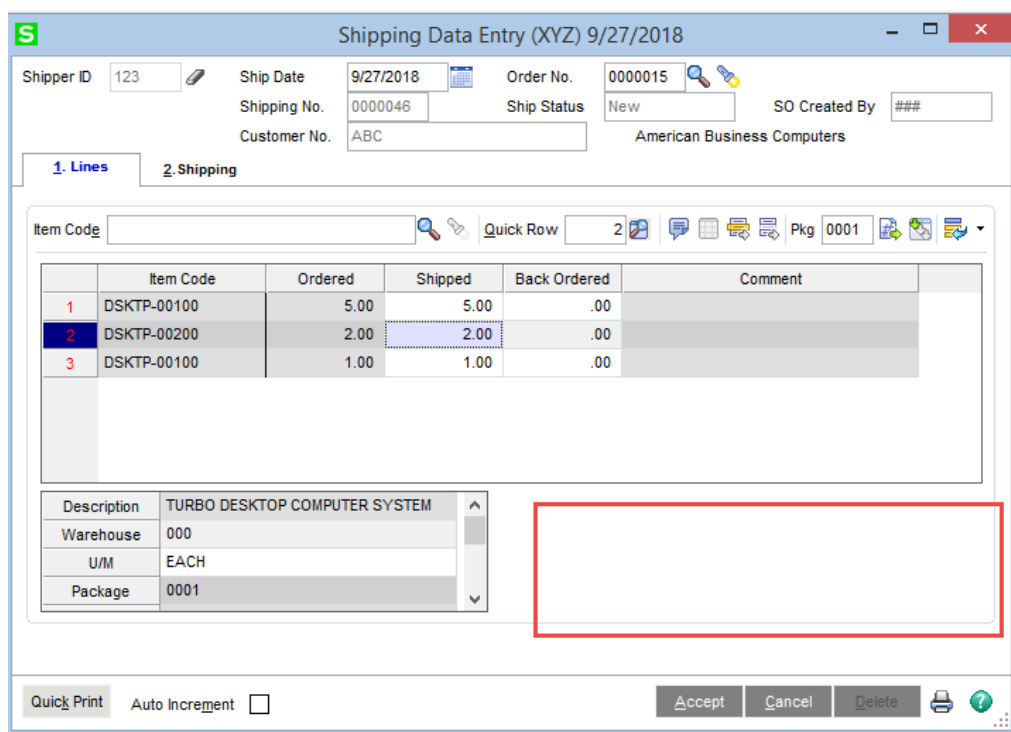
Sales Order No. 13 – Customer PO No. 123

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



The screenshot shows the 'Shipping Data Entry (XYZ) 9/27/2018' window. It has two tabs: '1. Lines' and '2. Shipping'. The '1. Lines' tab is selected. At the top, there are fields for 'Shipper ID' (123), 'Ship Date' (9/27/2018), 'Order No.' (0000015), 'Shipping No.' (0000046), 'Ship Status' (New), and 'SO Created By' (###). Below these, there is a field for 'Customer No.' (ABC) and the text 'American Business Computers'. The main area is a table with columns: 'Item Code', 'Ordered', 'Shipped', 'Back Ordered', and 'Comment'. There are three rows of data: Row 1: DSKTP-00100, 5.00, 5.00, .00; Row 2: DSKTP-00200, 2.00, 2.00, .00; Row 3: DSKTP-00100, 1.00, 1.00, .00. Below the table, there are fields for 'Description' (TURBO DESKTOP COMPUTER SYSTEM), 'Warehouse' (000), 'U/M' (EACH), and 'Package' (0001). A red rectangle highlights a large empty area below these fields. At the bottom left, there are buttons for 'Quick Print' and 'Auto Increment' (unchecked). At the bottom right, there are buttons for 'Accept', 'Cancel', 'Delete', a printer icon, and a help icon.

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

It has been consolidated with SO 13.

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Shipping Data Entry (XYZ) 9/27/2018

Shipper ID123

Ship Date9/27/2018

Order No.0000016

Shipping No.0000045

Ship StatusLines Completed

SO Created By###

Customer No.ABC

American Business Computers

1. Lines

2. Shipping

Item Code

Quick Row1

Pkg0001

	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	

DescriptionTOWER DESKTOP COMPUTER SYSTEM

Warehouse000

U/MEACH

Package0001

\* 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

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

SearchInvoice

Begins with

Find

Filters...

Custom...Lookup Wizard...

SelectCancel

Found 2 records

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.

The image shows two overlapping windows from the Sage 100 software. The top window is titled "S/O Invoice Data Entry (XYZ) 9/27/2018". It contains fields for Invoice No. (0000045), Invoice Date (9/27/2018), Invoice Type (Standard Invoice), Shipper ID (123), Customer No. (ABC), and Cust PO (123). A red box highlights the "Sales Order Number" field, which now displays "Multiple" and a green plus icon. A green arrow points from this field to the bottom window. The bottom window is titled "Apply Sales Orders to Invoice". It shows the same Invoice No. and Customer No. fields. Below these is a table with columns: Order No., Apply, Ship Complete, Order Date, Type, Customer PO No., and Status. The table lists five orders, with the last two (4 and 5) highlighted by a red box. Order 4 has its "Apply" and "Ship Complete" checkboxes checked. At the bottom of the bottom window are "OK" and "Cancel" buttons.

	Order No	Apply	Ship Complete	Order Date	Type	Customer PO No	Status
1	0000001	<input type="checkbox"/>	<input type="checkbox"/>	5/31/2020	Standard Order		Open
2	0000008	<input type="checkbox"/>	<input type="checkbox"/>	5/2/2020	Standard Order		Open
3	0000011	<input type="checkbox"/>	<input type="checkbox"/>	5/31/2020	Standard Order		Open
4	0000013	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5/15/2020	Standard Order	123	Open
5	0000016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	6/9/2020	Standard Order	123	New

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.