

Q: I want to know if I can add invoices from multiple clients to create a Consolidated Invoice?

A: Yes, you can select invoices from multiple clients and consolidate them into one consolidated invoice.

Q: Does Consolidated Invoices support split shipments invoices?

A: Yes, invoices from split-shipment orders can be included in a consolidated invoice.

Q: Can you edit the Consolidated Invoice after it's sent?

A: Yes, a consolidated invoice can be edited after it's sent. But you must resend it via email so that the client gets the updated copy that includes the edits.

Q: Can you back date the Consolidated Invoice date?

A: Yes, you can select a prior date to be applied to a consolidated invoice.

Q: Will Consolidated Invoice change the invoice date if the prior period is closed via Closing Date?

A: The invoice date on the individual invoices will not be changed. The invoice date selected for the consolidated invoice does not apply to the individual invoices, just the Terms will be updated on individual invoices. Consolidated Invoice can be back dated prior to the closing date and does not impact month end reporting.

Q: If a SO has been invoiced in a previous month, does the invoice date update to the date of the Consolidated Invoice when included? Does this change the month the revenue is recorded?

A: The invoice date on the individual invoices will not be changed. The invoice date selected for the consolidated invoice does not apply to the individual invoices and will not change month end revenue.

Q: When we get a payment, will we be able to apply total payment to the Consolidated Invoice number, or do we have to apply payment to each individual invoice?

A: The payment must be applied to each individual invoice, but that can be done in a batch/bulk using the Receive Payments feature.

Q: How will the sales person notify the finance person which invoices need to be consolidated?

A: This process has not changed and can be sent to the finance person by using the job log notes.

Q: Once the invoices have been consolidated, if the customer pays each invoice separately, will we be able to record the payments separately as usual?

A: Yes, payments are applied individually through Receive Payments or on each individual Sales Order page. Once all the invoices are paid, the consolidated invoice status will change to “paid”.

Q: Will the status change of the Consolidated Invoice change if it is partially paid?

A: No, the status will remain as Outstanding until the full payment is recorded. The details about payments on individual invoices can be seen on the consolidated invoice details page.

Q: Can you consolidate without affecting the invoicing date? Is it easier to receive payments for Consolidated Invoices?

A: The invoice date selected for the Consolidated Invoice does not apply to individual invoices. The payment can be applied in bulk through the Receive Payments feature or on the sales order page for each invoice. There will be an upcoming change to Receive Payments that allows quickly searching by the Consolidated Invoice number.

Q: Will there be an option to have a payment link for the Consolidated Invoice?

A: This initial phase of Consolidated Invoice does not include a payment link. Please share your feedback in the Ideas Hub.

Q: Do these Consolidated Invoices have the same 4 day locked in feature?

A: Consolidated invoices do not get committed/locked after 4 days, however no changes can be made once the status of the consolidated invoice changes to Paid. Prior to being paid, a consolidated invoice can be edited at any time.

Q: Once a Consolidated Invoice is created, can all the invoices be brought to the initial state, if needed, or asked by the client (as an individual invoice) like they were originally created in Syncore ?

A: An invoice does not change once it is added to a Consolidated Invoice and can still be sent individually as needed. You can delete a Consolidated Invoice in “draft” status and remove any invoice after it is sent by editing, this returns the invoice to the initial state.

Q: What does it look like on the Sales Order once the invoice is consolidated in, and is there any update on how it looks in AR tracker?

A: From the Sales Order page, you will see the Consolidated Invoice number and clicking this will navigate you to the details page of the respective Consolidated Invoice. Creating a Consolidated Invoice does not update the AR tracker.