



365 MAKERS

365 EASY INVOICING USER GUIDE



365 BUSINESS CENTRAL EXTENSION



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1. Introduction

Easy Invoicing extension allows user to fill in and post sales and purchase invoices or credit memo faster and easier than using the standard in Business Central.

This extension provides the user with two options for filling in and posting invoices and/or credit memos:

- If you want to post multiple invoices and/or credit memos at once, you must fill in the fields on the Easy Sales Screen and/or Easy Purchase Screen.
- If you want to post a single invoice/credit memo you can do from the previous screens or from the Easy Sales Screen Card and/or Easy Purchase Screen Card.

2. Purchase Easy Invoicing

As explained in the previous section, the user has two options for filling in and posting invoices and/or purchase credit memos with this extension:

a. Purchase Easy Page

If you want to post multiple invoices and/or credit memos at once, you must fill in the fields on this screen.

The screen is the same for invoices and credit memos. If the Amount field is positive, an invoice will be created, if it is negative, a credit memo will be created. In this case the user must fill in Corrected Invoice No. field.

i. Purchase invoice

The fields to be filled in on this screen are the same fields that appear on a standard purchase invoice, with the difference that the invoice that is filled in from here can only have one line with the information that is collected in the Type, No., Description, and Amount fields.

The Posting Error Description field is a field that collects error information that might occur during the posting process if any fields are not well filled in.



PURCHASES EASY PAGE | WORK DATE: 9/1/2020

Purchase Details										✓ SAVED	Print	Close
Vendor No.	Posting Date	Vendor Doc. No.	Type	No.	Description	Amount	Corrected Invoice No.	VAT Bus. Posting Group	VAT Prod. Posting Group	Department Code	Customergr...	Posting Error Description
10000	9/1/2020	202009251...	G/L Account	6000001	Compras nacional	10.00		EXPORT.	IVA21	ADM	GRANDE	
→ 10000	9/1/2020	202009251...	G/L Account	6000001	Compras nacional	20.00		EXPORT.	IVA21	ADM	MEDIO	

To create an invoice from this screen, the Amount field must be positive:

PURCHASES EASY PAGE | WORK DATE: 9/1/2020

Purchase Details										✓ SAVED	Print	Close
Vendor No.	Posting Date	Vendor Doc. No.	Type	No.	Description	Amount	Corrected Invoice No.	VAT Bus. Posting Group	VAT Prod. Posting Group	Department Code	Customergr...	Posting Error Description
10000	9/1/2020	202009251...	G/L Account	6000001	Compras nacional	10.00		EXPORT.	IVA21	ADM	GRANDE	
→ 10000	9/1/2020	202009251...	G/L Account	6000001	Compras nacional	20.00		EXPORT.	IVA21	ADM	MEDIO	

When the user wants to post the invoice, Post button must be pushed:

PURCHASES EASY PAGE | WORK DATE: 9/1/2020

Purchase Details										✓ SAVED	Print	Close
Vendor No.	Posting Date	Vendor Doc. No.	Type	No.	Description	Amount	Corrected Invoice No.	VAT Bus. Posting Group	VAT Prod. Posting Group	Department Code	Customergr...	Posting Error Description
10000	9/1/2020	202009251...	G/L Account	6000001	Compras nacional	10.00		EXPORT.	IVA21	ADM	GRANDE	
→ 10000	9/1/2020	202009251...	G/L Account	6000001	Compras nacional	20.00		EXPORT.	IVA21	ADM	MEDIO	

Once the invoice has been posted, it can be viewed and printed from the posted purchase invoices screen:

POSTED PURCHASE INVOICES | WORK DATE: 9/1/2020

Posted Purchase Invoices													Print	Close
No.	Vendor Invoice No.	Vendor No.	Vendor	Currency Code	Amount	Amount Including VAT	Location Code	No. Printed	Due Date	Remaining Amount	Closed	Canc...	Corre...	
106240	202009251...	10000	Fabrikam, Inc.		20.00	20.00		0	9/30/2020	20.00	No			
106239	202009251...	10000	Fabrikam, Inc.		10.00	10.00		0	9/30/2020	10.00	No			

ii. Purchase credit memo

The fields to be filled in on this screen are the same fields that appear on a standard purchase credit memo, with the difference that the credit memo that is filled in from here can only have one line with the information that is collected in the Type, No., Description, and Amount fields.

The Posting Error Description field is a field that collects error information that might occur during the posting process if any fields are not well filled in.

PURCHASES EASY PAGE | WORK DATE: 9/1/2020

Purchase Details										✓ SAVED	Print	Close
Vendor No.	Posting Date	Vendor Doc. No.	Type	No.	Description	Amount	Corrected Invoice No.	VAT Bus. Posting Group	VAT Prod. Posting Group	Department Code	Customergr...	Posting Error Description
10000	9/1/2020	202009251...	G/L Account	6000001	Compras nacional	-10.00	106240	EXPORT.	IVA21	ADM	GRANDE	
→ 10000	9/1/2020	202009251...	G/L Account	6000001	Compras nacional	-20.00	106239	EXPORT.	IVA21	ADM	MEDIO	

To create a credit memo from this screen, the Amount field must be negative:



PURCHASES EASY PAGE | WORK DATE: 9/1/2020

										✓ SAVED									
											Search	+ New		Delete		Post	Page	More options	
Vendor No.	Posting Date	Vendor Doc. No.	Type	No.	Description	Amount	Corrected Invoice No.	VAT Bus. Posting Group	VAT Prod. Posting Group	Department Code	Customergroup Code	Posting Error Description							
10000	9/1/2020	202009251...	G/L Account	6000001	Compras nacional	<10.00	108240	EXPORT.	IVA21	ADM	GRANDE								
→ 10000	9/1/2020	202009251...	G/L Account	6000001	Compras nacional	>20.00	108239	EXPORT.	IVA21	ADM	MEDIO								

When the user wants to post the credit memo, Post button must be pushed:

PURCHASES EASY PAGE | WORK DATE: 9/1/2020

										✓ SAVED									
											Search	+ New		Delete		Post	Page	More options	
Vendor No.	Posting Date	Vendor Doc. No.	Type	No.	Description	Amount	Corrected Invoice No.	VAT Bus. Posting Group	VAT Prod. Posting Group	Department Code	Customergroup Code	Posting Error Description							
10000	9/1/2020	202009251...	G/L Account	6000001	Compras nacional	-10.00	108240	EXPORT.	IVA21	ADM	GRANDE								
→ 10000	9/1/2020	202009251...	G/L Account	6000001	Compras nacional	-20.00	108239	EXPORT.	IVA21	ADM	MEDIO								

Once the credit memo has been posted, it can be viewed and printed from the posted purchase credit memos screen:

POSTED PURCHASE CREDIT MEMOS | WORK DATE: 9/1/2020

													Search	Manage	Process	Navigate	Print/Send	Credit Memo	Page	More options	
No.	Buy-from Vendor No.	Buy-from Vendor Name	Currency Code	Due Date	Amount	Amount Including VAT	Remaining Amount	Paid	Cancell...	Correct...	Location Code	No. Printed									
109016	10000	Fabrikam, Inc.		9/30/2020	20.00	20.00	-20.00	No			0										
109015	10000	Fabrikam, Inc.		9/30/2020	10.00	10.00	-10.00	No			0										

iii. Example

Now let us make an example in order user can practice how to work with purchase easy invoicing.

1. In the “Tell me what you want to do” search for “Purchase easy page”.

Tell me what you want to do

Go to Pages and Tasks

Purchases Easy Page Lists

2. We are going to create an invoice and a credit memo. So, click on “New”

Purchases Easy Page | Work Date: 31/12/2021

											Search	+ New		Delete		Post		Open in Excel	
Vendor No.	Posting Date	Vendor Doc. No.	Type	No.	Description	Amount	Corrected Invoice No.	VAT Bus. Posting Group	VAT Prod. Posting Group	Department Code	Customergroup Code	Posting Error Description							
→																			

3. Create a line for the invoice as follow.



Field No.	Value
Vendor No.	10000
Posting Date	31/12/2021
Type	G/L Account
No.	6000001
Description	General purchases
Amount	1000

4. If we try to “Post” the invoice an error will occur, because we have not informed the field “Vendor Doc. No.” that is mandatory in purchase documents.

Purchases Easy Page | Work Date: 31/12/2021

Vendor No.	Posting Date	Vendor Doc. No.	Type	No.	Description	Amount	Corrected Invoice No.	VAT Bus. Posting Group	VAT Prod. Posting Group	Department Code	Customergroup Code	Posting Error Description
→ 10000	: 31/12/2021		G/L Account	6000001	General purchases	1.000,00		EXPORT.	IVAA1			You need to enter the document number of the document from the vendor in the Vendor Invoice No. field, so that this document stays linked to the original.

5. Fill the “Vendor Doc. No.” with the value “10000_2112_078” and “Post” the invoice.

Purchases Easy Page | Work Date: 31/12/2021

Vendor No.	Posting Date	Vendor Doc. No.	Type	No.	Description	Amount	Corrected Invoice No.	VAT Bus. Posting Group	VAT Prod. Posting Group	Department Code	Customergroup Code
→ 10000	: 31/12/2021	10000_2112_...	G/L Account	6000001	General purchases	1.000,00		EXPORT.	IVAA1		

6. In the “Tell me what you want to do” search for “Posted Purchase Invoices” to look for the invoice we have just posted.

Tell me what you want to do

Posted Purchase Invoices

Go to Reports and Analysis

Posted Purchase Invoices
Archive

7. In the filter pane, filter by “Vendor Invoice No.” field with the value informed in that field (“10000_2112_078”).



No.	Vendor Invoice No.	Vendor No.	Vendor	Currency Code	Amount	Amount Including VAT	Location Code	No. Printed	Due Date	Remaining Am.
108224	10000_2112_078	10000	Fabrikam, Inc.	EUR	1,000.00	850.00		0	31/12/2021	85

8. User can check that the invoice has been posted correctly. Keep the invoice No. in mind because we need it to make a credit memo.

9. Now let us make a credit memo. In the “Tell me what you want to do” search for “Purchase easy page”.

Tell me what you want to do X

Purchase easy page

[Go to Pages and Tasks](#)

> [Purchases Easy Page](#)

Lists

10. Click “New” and create a line for the credit memo as follow:

Field No.	Value
Vendor No.	10000
Posting Date	31/12/2021
Vendor Doc. No.	10000_CRM_155 (mandatory for purchase documents)
Type	G/L Account
No.	6000001
Description	General purchases
Amount	-1000 (must be negative for a credit memo)
Corrected Invoice No.	We can inform the invoice No. created previously, in our case 108224

11. Click “Post” to post the credit memo

Vendor No.	Posting Date	Vendor Doc. No.	Type	No.	Description	Amount	Corrected Invoice No.	VAT Bus. Posting Group	VAT Prod. Posting Group	Department Code	Customergroup Code	Posting Error Description
→ 10000	31/12/2021	10000_CRM_155	G/L Account	6000001	General purchases	-1,000.00	108224	EXPORT.	IVA21			



12. In the “Tell me what you want to do” search for “Posted Purchase Credit Memos” to look for the credit memo we have just posted.

Tell me what you want to do ↶ X

Posted Purchase Credit Memos

Go to Reports and Analysis

List **Posted Purchase Credit Memos** Archive

13. In the filter pane, filter by “Vendor Cr. Memo No.” field with the value informed in that field (“10000_CRM_155”) to check the posted credit memo.

Posted Purchase Credit Memos | Work Date: 31/12/2021

Views	No.	Buy-from Vendor No.	Buy-from Vendor Name	Currency Code	Due Date	Amount	Amount Including VAT	Remaining Amount	Paid
*All	109005	: 10000	Fabrikam, Inc.		31/12/2021	1,000.00	850.00	-850.00	No

Filter list by:
 Vendor Cr. Memo No.
 10000_CRM_155
+ Filter...
Reset filters

14. We have made one invoice and one credit memo separate, but in this page, user can make as many documents as he/she wants and then post all together selecting all of them and clicking “Post”.

Purchases Easy Page | Work Date: 31/12/2021

Vendor No.	Posting Date	Vendor Doc. No.	Type	No.	Description	Amount	Corrected Invoice No.	VAT Bus. Posting Group	VAT Prod. Posting Group	Department Code	Customergroup-Code	Posting Error Description
20000	31/12/2021	INV_0998	G/L Account	6000001	General purchases	1,522.00	NAC	IVA21				
30000	31/12/2021	XXXX_12258	G/L Account	6000001	Office material	250.00	UE	IVA21				
10000	31/12/2021	CR_1255	G/L Account	6000001	Incorrect invoice	-1,600.00	108175	EXPORT.	IVA21			

b. Purchase Easy Page Card

If you want to post a single purchase invoice/credit memo, you can do so from the previous screen or from this screen.

The screen is the same for invoices and credit memos. If the Amount field is positive, an invoice will be created, if it is negative, a credit memo will be created. In this case the user must fill in Corrected Invoice No. field.



i. Purchase Invoice

The fields to be filled in on this screen are the same fields that appear on a standard purchase invoice, with the difference that the invoice that is filled in from here can only have one line with the information that is collected in the Type, No., Description, and Amount fields.

The Posting Error Description field is a field that collects error information that might occur during the posting process if any fields are not well filled in.

Vendor No.	10000	Amount	10.00
Posting Date	9/1/2020	VAT Bus. Posting Group	EXPORT..
Vendor Doc. No.	202009251241	VAT Prod. Posting Group	IVA21
Type	G/L Account	Department Code	ADM
No.	6000001	Customergroup Code	GRANDE
Description	Compras nacional	Posting Error Description	

To create an invoice from this screen, the Amount field must be positive:

Vendor No.	10000	Amount	10.00
Posting Date	9/1/2020	VAT Bus. Posting Group	EXPORT..
Vendor Doc. No.	202009251241	VAT Prod. Posting Group	IVA21
Type	G/L Account	Department Code	ADM
No.	6000001	Customergroup Code	GRANDE
Description	Compras nacional	Posting Error Description	

When the user wants to post the invoice, Post button must be pushed:

Vendor No.	10000	Amount	10.00
Posting Date	9/1/2020	VAT Bus. Posting Group	EXPORT..
Vendor Doc. No.	202009251241	VAT Prod. Posting Group	IVA21
Type	G/L Account	Department Code	ADM
No.	6000001	Customergroup Code	GRANDE
Description	Compras nacional	Posting Error Description	

Once the invoice has been posted, it can be viewed and printed from the posted purchase invoices screen:

No.	Vendor Invoice No.	Vendor No.	Vendor	Currency Code	Amount	Amount Including VAT	Location Code	No. Printed	Due Date	Remaining Amount	Closed	Cance...	Corre...
108241	202009251241	10000	Fabrikam, Inc.		10.00	10.00		0	9/30/2020	10.00	No		



ii. Purchase credit memo

The fields to be filled in on this screen are the same fields that appear in a standard purchase credit memo, with the difference that the credit memo that is filled in from here can only have one line with the information that is collected in the Type, No., Description, and Amount fields.

The Posting Error Description field is a field that collects error information that might occur during the posting process if any fields are not well filled in.

PURCHASES EASY PAGE CARD | WORK DATE: 9/1/2020

10000 · G/L Account · 6000001

Post | More options

Vendor No.	10000	Corrected Invoice No.	108241
Posting Date	9/1/2020	VAT Bus. Posting Group	EXPORT.
Vendor Doc. No.	202009251246	VAT Prod. Posting Group	IVA21
Type	G/L Account	Department Code	ADM
No.	6000001	Customergroup Code	GRANDE
Description	Compras nacional	Posting Error Description	
Amount	-10.00		

For the credit memo data to be filled in on the screen, the Amount field must be negative:

PURCHASES EASY PAGE CARD | WORK DATE: 9/1/2020

10000 · G/L Account · 6000001

Post | More options

Vendor No.	10000	Corrected Invoice No.	108241
Posting Date	9/1/2020	VAT Bus. Posting Group	EXPORT.
Vendor Doc. No.	202009251246	VAT Prod. Posting Group	IVA21
Type	G/L Account	Department Code	ADM
No.	6000001	Customergroup Code	GRANDE
Description	Compras nacional	Posting Error Description	
Amount	-10.00		

When the user wants to post the credit memo, Post button must be pushed:

PURCHASES EASY PAGE CARD | WORK DATE: 9/1/2020

10000 · G/L Account · 6000001

Post | More options

Vendor No.	10000	Corrected Invoice No.	108241
Posting Date	9/1/2020	VAT Bus. Posting Group	EXPORT.
Vendor Doc. No.	202009251246	VAT Prod. Posting Group	IVA21
Type	G/L Account	Department Code	ADM
No.	6000001	Customergroup Code	GRANDE
Description	Compras nacional	Posting Error Description	
Amount	-10.00		

Once the credit memo has been posted, it can be viewed and printed from the posted purchase credit memos screen:



POSTED PURCHASE CREDIT MEMOS | WORK DATE: 9/1/2020

	Buy-from Vendor No.	Buy-from Vendor Name	Currency Code	Due Date	Amount	Amount Including VAT	Remaining Amount	Paid	Cancel...	Correct...	Location Code	No. Printed
109017	10000	Fabrikam, Inc.		9/30/2020	10.00	10.00	-10.00	No				0

iii. Example

Now let us make an example in order user can practice how to work with purchase easy page card. We are going to perform a purchase invoice, for a credit memo is the same changing to a negative amount.

1. In the “Tell me what you want to do” search for “Purchases Easy Page Card”.

Tell me what you want to do ✖

Purchases Easy Page Card

Go to Pages and Tasks

> Purchases Easy Page Card
Tasks

2. Fill the fields as follow to create a purchase invoice

Field No.	Value
Vendor No.	10000
Posting Date	31/12/2021
Vendor Doc. No.	INV_2112_4558 (mandatory for purchase documents)
Type	G/L Account
No.	6000001
Description	General purchases
Amount	256

3. Click “Post” to post the purchase invoice



Purchases Easy Page Card | Work Date: 31/12/2021

10000 · G/L Account · 6000001

Vendor No.	10000	Amount	256.00
Posting Date	31/12/2021	VAT Bus. Posting Group	EXPORT
Vendor Doc. No.	INV_2112_4558	VAT Prod. Posting Group	IVA21
Type	G/L Account	Department Code	
No.	6000001	Customergroup Code	
Description	General purchases	Posting Error Description	

4. In the “Tell me what you want to do” search for “Posted Purchase Invoices” to look for the invoice we have just posted.

Tell me what you want to do

[Go to Reports and Analysis](#)

[Posted Purchase Invoices](#)

[Archive](#)

5. In the filter pane, filter by “Vendor Invoice No.” field with the value informed in that field (“INV_2112_4558”).

Posted Purchase Invoices | Work Date: 31/12/2021

No.	Vendor Invoice No.	Vendor No.	Vendor	Country/Region	Amount	Amount Including VAT	Location Code	No. Printed	Due Date	Remaining Amts
108225	INV_2112_4558	10000	Fabrikam, Inc.		256.00	217.60		0	31/12/2021	21

3. Sales Easy Invoicing

As explained in the previous section, the user has two options for filling in and posting invoices and/or sales credit memos with this extension:

a. Sales Easy Page

If you want to post multiple invoices and/or credit memos at once, you must fill in the fields on this screen.



The screen is the same for invoices and credit memos. If the Amount field is positive, an invoice will be created, if it is negative, a credit memo will be created. In this case the user must fill in Corrected Invoice No. field.

i. Sales invoice

The fields to be filled in on this screen are the same fields that appear on a standard sales invoice, with the difference that the invoice that is filled in from here can only have one line with the information that is collected in the Type, No., Description, and Amount fields.

The Posting Error Description field is a field that collects error information that might occur during the posting process if any fields are not well filled in.

SALES EASY PAGE WORK DATE: 9/1/2020											
Search + New Edit List Delete Post Page More options ✓ SAVED □ □ ✖											
Customer No.	Posting Date	Type	No.	Description	Amount	Corrected Invoice No.	VAT Bus. Posting Group	VAT Prod. Posting Group	Department Code	Customergro... Code	Posting Error Description
10000	9/1/2020	G/L Account	7000001	Ventas mercad. nacionales	10.00	NAC	IVA21	ADM	GRANDE		
→ 10000	9/1/2020	G/L Account	7000001	Ventas mercad. nacionales	20.00	NAC	IVA21	CCIAL	MEDIO		

To create an invoice from this screen, the Amount field must be positive:

SALES EASY PAGE WORK DATE: 9/1/2020											
Search + New Edit List Delete Post Page More options ✓ SAVED □ □ ✖											
Customer No.	Posting Date	Type	No.	Description	Amount	Corrected Invoice No.	VAT Bus. Posting Group	VAT Prod. Posting Group	Department Code	Customergro... Code	Posting Error Description
10000	9/1/2020	G/L Account	7000001	Ventas mercad. nacionales	10.00	NAC	IVA21	ADM	GRANDE		
→ 10000	9/1/2020	G/L Account	7000001	Ventas mercad. nacionales	20.00	NAC	IVA21	CCIAL	MEDIO		

When the user wants to post the invoice, Post button must be pushed:

SALES EASY PAGE WORK DATE: 9/1/2020											
Search + New Edit List Delete Post Page More options ✓ SAVED □ □ ✖											
Customer No.	Posting Date	Type	No.	Description	Amount	Corrected Invoice No.	VAT Bus. Posting Group	VAT Prod. Posting Group	Department Code	Customergro... Code	Posting Error Description
10000	9/1/2020	G/L Account	7000001	Ventas mercad. nacionales	10.00	NAC	IVA21	ADM	GRANDE		
→ 10000	9/1/2020	G/L Account	7000001	Ventas mercad. nacionales	20.00	NAC	IVA21	CCIAL	MEDIO		

Once the invoice has been posted, it can be viewed and printed from the posted sales invoices screen:

POSTED SALES INVOICES WORK DATE: 9/1/2020											
Search Manage Process Invoice Navigate Correct Print/Send Page Actions Navigate Fewer options □ □ ✖											
No.	Customer No.	Customer Name	Currency Code	Due Date	Amount	Amount Including VAT	Remaining Amount	Location Code	No. Printed	Closed	Cancel...
103245	10000	Adatum Corporation		9/30/2020	20.00	20.29	20.29		0	No	
103244	10000	Adatum Corporation		9/30/2020	10.00	10.14	10.14		0	No	



ii. Sales credit memo

The fields to be filled in on this screen are the same fields that appear in a standard sales credit memo, with the difference that the credit memo that is filled in from here can only have one line with the information that is collected in the Type, No., Description, and Amount fields.

The Posting Error Description field is a field that collects error information that might occur during the posting process if any fields are not well filled in.

SALES EASY PAGE WORK DATE: 9/1/2020											✓ SAVED			
Search + New Edit List Delete Post Page More options														
Customer No.	Posting Date	Type	No.	Description	Amount	Corrected Invoice No.	VAT Bus. Posting Group	VAT Prod. Posting Group	Department Code	Customergr...	Code	Posting Error Description		
10000	9/1/2020	G/L Account	7000001	Ventas mercad. nacionales	-10.00	103245	NAC	IVA21	ADM	GRANDE				
→ 10000	9/1/2020	G/L Account	7000001	Ventas mercad. nacionales	-20.00	103244	NAC	IVA21	ADM	MEDIO				

For the credit memo data to be filled in on the screen, the Amount field must be negative:

SALES EASY PAGE WORK DATE: 9/1/2020											✓ SAVED			
Search + New Edit List Delete Post Page More options														
Customer No.	Posting Date	Type	No.	Description	Amount	Corrected Invoice No.	VAT Bus. Posting Group	VAT Prod. Posting Group	Department Code	Customergr...	Code	Posting Error Description		
10000	9/1/2020	G/L Account	7000001	Ventas mercad. nacionales	-10.00	103245	NAC	IVA21	ADM	GRANDE				
→ 10000	9/1/2020	G/L Account	7000001	Ventas mercad. nacionales	-20.00	103244	NAC	IVA21	ADM	MEDIO				

When the user wants to post the credit memo, Post button must be pushed:

SALES EASY PAGE WORK DATE: 9/1/2020											✓ SAVED			
Search + New Edit List Delete Post Page More options														
Customer No.	Posting Date	Type	No.	Description	Amount	Corrected Invoice No.	VAT Bus. Posting Group	VAT Prod. Posting Group	Department Code	Customergr...	Code	Posting Error Description		
10000	9/1/2020	G/L Account	7000001	Ventas mercad. nacionales	-10.00	103245	NAC	IVA21	ADM	GRANDE				
→ 10000	9/1/2020	G/L Account	7000001	Ventas mercad. nacionales	-20.00	103244	NAC	IVA21	ADM	MEDIO				

Once the credit memo has been posted, it can be viewed and printed from the posted sales credit memos screen:

POSTED SALES CREDIT MEMOS WORK DATE: 9/1/2020															
Search Manage Process Credit Memo Navigate Print/Send Page More options															
No.	Sell-to Customer No.	Customer Name	Currency Code	Due Date	Amount	Amount including VAT	Remaining Amount	Paid	Cancell...	Correct...	Location Code	No. Printed			
104015	10000	Adatum Corporation		9/30/2020	20.00	20.29	-20.29	No				0			
104014	10000	Adatum Corporation		9/30/2020	10.00	10.14	-10.14	No				0			

iii. Example

Now let us make an example in order user can practice how to work with sales easy invoicing.



1. In the “Tell me what you want to do” search for “Sales easy page”.

Tell me what you want to do ↶ X

Go to Pages and Tasks

> Sales Easy Page	Lists
> Sales Easy Page Card	Tasks

2. We are going to create an invoice and a credit memo. So, click on “New”

Sales Easy Page | Work Date: 31/12/2021

Customer No.	Posting Date	Type	No.	Description	Amount	Corrected Invoice No.	VAT Bus. Posting Group	VAT Prod. Posting Group	Department Code	Customergroup Code	Posting Error Description
→ <input type="text"/>											

3. Create a line for the invoice as follow:

Field No.	Value
Customer No.	40000
Posting Date	31/12/2021
Type	G/L Account
No.	7000001
Description	General sales
Amount	1500

4. Click “Post” to post the invoice.

Sales Easy Page | Work Date: 31/12/2021 ✓ Saved

Customer No.	Posting Date	Type	No.	Description	Amount	Corrected Invoice No.	VAT Bus. Posting Group	VAT Prod. Posting Group	Department Code	Customergroup Code	Posting Error Description
→ 40000	31/12/2021	G/L Account	7000001	General sales	1.500,00		UE	IVA21			

5. In the “Tell me what you want to do” search for “Posted Sales Invoices” to look for the invoice we have just posted.



Tell me what you want to do ↶ ↷ X

Posted Sales Invoice

On current page (Business Manager)

Sales Invoice

Create a new invoice for the sales of items or services. Invoice quantities cannot be post...

Go to Reports and Analysis

[Posted Sales Invoices](#)

[Archive](#)

6. In “Posted Sales Invoice” list the first one will be the invoice user has just posted

Posted Sales Invoices Work Date: 31/12/2021											Open in Excel	More options
No.	Customer No.	Customer Name	Currency Code	Due Date	Amount	Amount Including VAT	Remaining Amount	Location Code	No. Printed	Closed	Cancelled	Corrective
103227	40000	Alpine Ski House		30/01/2022	1,500.00	1,500.00	0.00		0	Yes		
103226	50000	Relecloud		14/01/2022	0.00	847.00	847.00		0	No		
103225	50000	Relecloud		14/01/2022	0.00	847.00	847.00		0	No		
103224	10000	Adatum Corporation		31/12/2021	1,000.00	1,060.00	1,060.00		0	No		
103223	10000	Adatum Corporation		31/12/2021	1,000.00	1,060.00	1,060.00		0	No		
103222	10000	Adatum Corporation		31/12/2021	0.00	1,217.02	0.00		0	Yes		
103221	10000	Adatum Corporation		31/12/2021	0.00	1,427.80	0.00		7	Yes		

7. User can check that the invoice has been posted correctly. Keep the invoice No. in mind because we need it to make a credit memo.

8. Now let us make a credit memo. In the “Tell me what you want to do” search for “Sales easy page”.

Tell me what you want to do ↶ ↷ X

Sales easy page

Go to Pages and Tasks

[Sales Easy Page](#)

Lists

[Sales Easy Page Card](#)

Tasks

Didn't find what you were looking for? Try [exploring](#)

9. Click “New” and create a line for the credit memo as follow:

Field No.	Value
Customer No.	40000
Posting Date	31/12/2021



Type	G/L Account
No.	7000001
Description	General sales
Amount	-1500 (must be negative for a credit memo)
Corrected Invoice No.	We can inform the invoice No. created previously, in our case 103227

10. Click “Post” to post the credit memo

Sales Easy Page | Work Date: 31/12/2021 ✓ Saved []

Search + New Edit List Delete Post Open in Excel

Customer No.	Posting Date	Type	No.	Description	Amount	Corrected Invoice No.	VAT Bus. Posting Group	VAT Prod. Posting Group	Department Code	Customergroup Code	Posting Error Description
→ 40000	31/12/2021	G/L Account	7000001	General sales	-1.500,00	103227	UE	IVAZ1			

11. In the “Tell me what you want to do” search for “Posted Sales Credit Memos” to look for the credit memo we have just posted.

Tell me what you want to do ↶ X

Posted Sales Credit Memos

Go to Reports and Analysis

Posted Sales Credit Memos Archive

12. In “Posted Sales Credit Memos” list the first one will be the credit memo user has just posted.

Posted Sales Credit Memos | Work Date: 31/12/2021

Search Manage Process Credit Memo Navigate Print/Send Open in Excel More options

No.	Sell-to Customer No.	Customer Name	Currency Code	Due Date	Amount	Amount Including VAT	Remaining Amount	Paid	Cancel...	Correc...	Location Code	No
104004	40000	Alpine Ski House		30/01/2022	1.500,00	1.500,00	-1.500,00	No				
104003	20000	Trey Research		15/12/2021	0,00	726,00	-726,00	No				
104002	10000	Adatum Corporation		31/12/2021	0,00	363,00	0,00	Yes				
104001	10000	Adatum Corporation		31/12/2021	0,00	1.452,00	0,00	Yes				

13. We have made one invoice and one credit memo separate, but in this page, user can make as many documents as he/she wants and then post all together selecting all of them and clicking “Post”



Sales Easy Page | Work Date: 31/12/2021

✓ Saved □

Customer No.	Posting Date	Type	No.	Description	Amount	Corrected Invoice No.	VAT Bus. Posting Group	VAT Prod. Posting Group	Department Code	Customergroup Code	Posting Error Description
10000	31/12/2021	G/L Account	7000001	General sales	1,200.00		NAC	IVA21			
20000	31/12/2021	G/L Account	7000001	General sales	300.00		NAC	IVA21			
50000	31/12/2021	G/L Account	7000001	Incorrect invoice	-600.00	103225	NAC	IVA21			

b. Sales Easy Page Card

If you want to post a singles sales invoice/credit memo, you can do so from the previous screen or from this screen.

The screen is the same for invoices and credit memos. If the Amount field is positive, an invoice will be created, if it is negative, a credit memo will be created. In this case the user must fill in Corrected Invoice No. field

i. Sales invoice

The fields to be filled in on this screen are the same fields that appear on a standard sales invoice, with the difference that the invoice that is filled in from here can only have one line with the information that is collected in the Type, No., Description, and Amount fields.

The Posting Error Description field is a field that collects error information that might occur during the posting process if any fields are not well filled in.

SALES EASY PAGE CARD | WORK DATE: 9/1/2020

✓ SAVED □ ✖

10000 · G/L Account · 7000001

Post | More options

Customer No.	10000	VAT Bus. Posting Group	NAC
Posting Date	9/1/2020	VAT Prod. Posting Group	IVA21
Type	G/L Account	Department Code	ADM
No.	7000001	Customergroup Code	GRANDE
Description	Ventas mercad. nacionales	Posting Error Description	
Amount	10.00		

For the invoice data to be filled in on the screen, the Amount field must be negative:



SALES EASY PAGE CARD | WORK DATE: 9/1/2020

10000 · G/L Account · 7000001

Post | More options

Customer No.	10000	VAT Bus. Posting Group	NAC
Posting Date	9/1/2020	VAT Prod. Posting Group	IVA21
Type	G/L Account	Department Code	ADM
No.	7000001	Customergroup Code	GRANDE
Description	Ventas mercad. nacionales	Posting Error Description	
Amount	10.00		

When the user wants to post the invoice, Post button must be pushed:

SALES EASY PAGE CARD | WORK DATE: 9/1/2020

10000 · G/L Account · 7000001

Post | More options

Customer No.	10000	VAT Bus. Posting Group	NAC
Posting Date	9/1/2020	VAT Prod. Posting Group	IVA21
Type	G/L Account	Department Code	ADM
No.	7000001	Customergroup Code	GRANDE
Description	Ventas mercad. nacionales	Posting Error Description	
Amount	10.00		

Once the invoice has been posted, it can be viewed and printed from the posted sales invoices screen:

POSTED SALES INVOICES | WORK DATE: 9/1/2020

No.	Customer No.	Customer Name	Currency Code	Due Date	Amount	Amount Including VAT	Remaining Amount	Location Code	No. Printed	Closed	Cancel...	Correct...
103243	10000	Adatum Corporation		9/30/2020	10.00	10.14	10.14		0	No		

ii. Sales credit memo

The fields to be filled in on this screen are the same fields that appear on a standard sales credit memo, with the difference that the credit memo that is filled in from here can only have one line with the information that is collected in the Type, No., Description, and Amount fields.

The Posting Error Description field is a field that collects error information that might occur during the posting process if any fields are not well filled in.



SALES EASY PAGE CARD | WORK DATE: 9/1/2020

10000 · G/L Account · 7000001

Post | More options

Customer No.	10000	Corrected Invoice No.	103242
Posting Date	9/1/2020	VAT Bus. Posting Group	NAC
Type	G/L Account	VAT Prod. Posting Group	IVA21
No.	7000001	Department Code	ADM
Description	Ventas mercad. nacionales	Customergroup Code	GRANDE
Amount	-10.00	Posting Error Description	

For the credit memo data to be filled in on the screen, the Amount field must be negative:

SALES EASY PAGE CARD | WORK DATE: 9/1/2020

10000 · G/L Account · 7000001

Post | More options

Customer No.	10000	Corrected Invoice No.	103242
Posting Date	9/1/2020	VAT Bus. Posting Group	NAC
Type	G/L Account	VAT Prod. Posting Group	IVA21
No.	7000001	Department Code	ADM
Description	Ventas mercad. nacionales	Customergroup Code	GRANDE
Amount	-10.00	Posting Error Description	

When the user wants to post the credit memo, Post button must be pushed:

SALES EASY PAGE CARD | WORK DATE: 9/1/2020

10000 · G/L Account · 7000001

Post | More options

Customer No.	10000	Corrected Invoice No.	103242
Posting Date	9/1/2020	VAT Bus. Posting Group	NAC
Type	G/L Account	VAT Prod. Posting Group	IVA21
No.	7000001	Department Code	ADM
Description	Ventas mercad. nacionales	Customergroup Code	GRANDE
Amount	-10.00	Posting Error Description	

Once the credit memo has been posted, it can be viewed and printed from the posted sales credit memos screen:

POSTED SALES CREDIT MEMOS | WORK DATE: 9/1/2020

Search | Manage | Process | Credit Memo | Navigate | Print/Send | Page | More options

No.	Sell-to Customer No.	Customer Name	Currency Code	Due Date	Amount	Amount Including VAT	Remaining Amount	Paid	Cancel...	Corre
104013	10000	Adatum Corporation		9/30/2020	10.00	10.14	-10.14	No		



iii. Example

Now let us make an example in order user can practice how to work with sales easy page card. We are going to perform a sales invoice, for a credit memo is the same changing to a negative amount.

1. In the “Tell me what you want to do” search for “Sales Easy Page Card”.

Tell me what you want to do

sales easy page card

Go to Pages and Tasks

> Sales Easy Page Card Tasks

Didn't find what you were looking for? Try exploring

2. Fill the fields as follow to create a sales invoice.

Field No.	Value
Customer No.	10000
Posting Date	31/12/2021
Type	G/L Account
No.	7000001
Description	General sales
Amount	1200

3. Click “Post” to post the sales invoice

Sales Easy Page Card | Work Date: 31/12/2021

10000 · G/L Account · 7000001

Post

Customer No.	10000	VAT Bus. Posting Group	NAT
Posting Date	31/12/2021	VAT Prod. Posting Group	IVA21
Type	G/L Account	Department Code	
No.	7000001	Customergroup Code	
Description	General sales	Posting Error Description	
Amount	1200.00		

4. In the “Tell me what you want to do” search for “Posted Sales Invoices” to look for the invoice we have just posted.



Tell me what you want to do ↶ X

Posted Sales Invoice

On current page (Business Manager)

Sales Invoice

Create a new invoice for the sales of items or services. Invoice quantities cannot be post...

Go to Reports and Analysis

 Posted Sales Invoices

Archive

In "Posted Sales Invoice" list the first one will be the invoice user has just posted.

Posted Sales Invoices Work Date: 31/12/2021											
No.	Customer No.	Customer Name	Currency Code	Due Date	Amount	Amount Including VAT	Remaining Amount	Location Code	No. Printed	Closed	Cancelled
103228	10000	Adatum Corporation		31/12/2021	1,200.00	1,272.00	1,272.00		0	No	
103227	40000	Alpine Ski House		30/01/2022	1,500.00	1,500.00	0.00		0	Yes	
103226	50000	Placeholder		14/01/2022	0.00	0.00	0.00		0	No	