



# Batch Invoice Sales Orders User Guide

---

## Contents

Getting Started.....	2
Selecting the Sales Orders to Invoice.....	5
Setting your Invoice Options.....	6
Marking To Be Emailed .....	6
Marking To Be Printed .....	7
Setting the Invoice Date.....	7
Use SO # as Invoice # .....	7
Updating QuickBooks.....	8

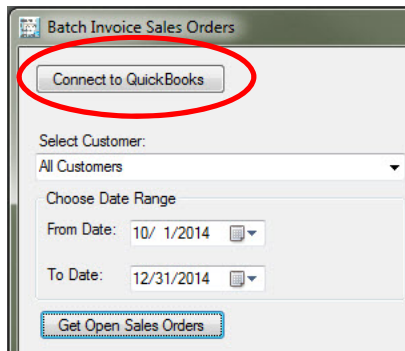


# Batch Invoice Sales Orders User Guide

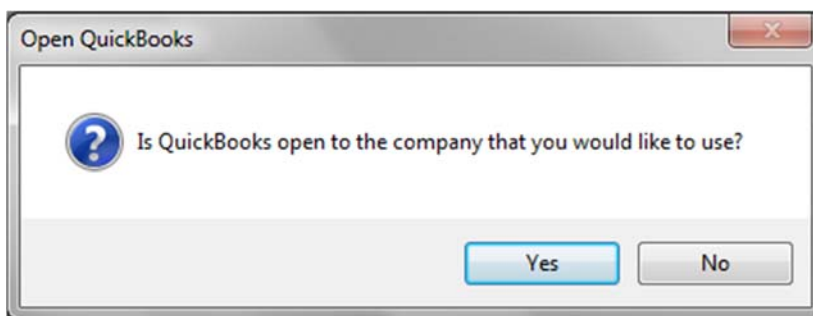
---

## Getting Started

1. Download the BatchInvoiceSalesOrders.zip file and install on the same computer where QuickBooks is installed. (See Installation Instructions)
2. Open QuickBooks, and open the company file that you want to use.
3. Start the Batch Invoice Sales Orders Utility by double clicking the icon on the desktop or by going to Start- Programs- QB Utility – Batch Invoice Sales Orders
4. The Batch Invoice Sales Orders will open in a new window. Click **Connect to QuickBooks** get started.



5. A window will appear asking if QB is open to the company that you would like to use. Ensure that QuickBooks is open on the company that you would like to work with, and then click "Yes"

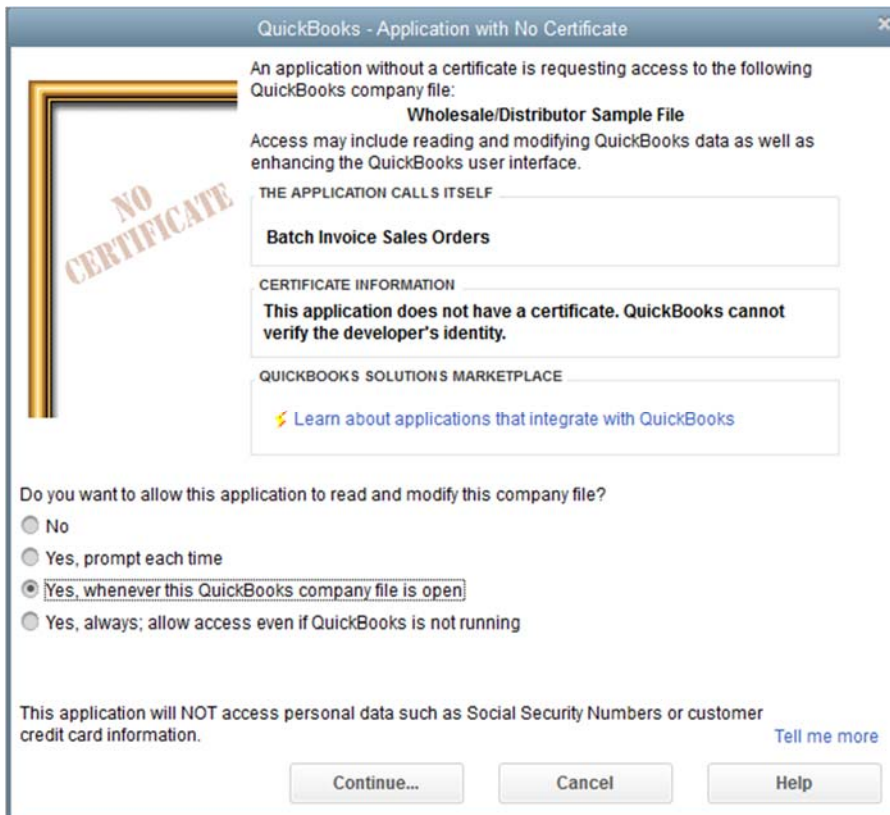




## Batch Invoice Sales Orders User Guide

---

6. The first time you use the Batch Invoice Sales Orders Utility, QuickBooks will require you to grant permission to the utility to access data. Select “Yes, whenever this QuickBooks company file is open” and then click “Continue”.





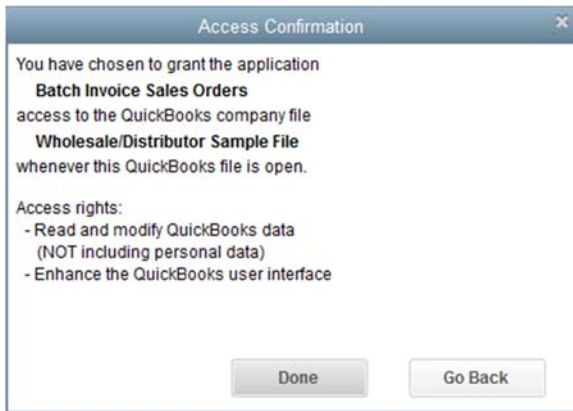
## Batch Invoice Sales Orders User Guide

---

7. A window will appear asking you to confirm, click "Yes".



8. Access Confirmation window will appear, click "Done"

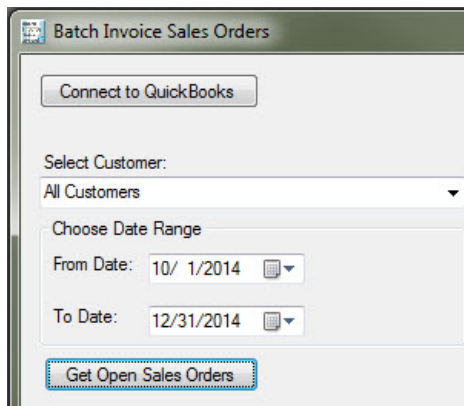




# Batch Invoice Sales Orders User Guide

## Selecting the Sales Orders to Invoice

1. The Batch Invoice Sales Orders Utility will open in a new window. Click Connect to QuickBooks get started.
  - a. Use the drop down to select a specific Customer or select ALL CUSTOMERS- only sales orders for that specific Customer:Job will be retrieved if you select a customer.
  - b. Enter a Date Range- only Sales Orders in this Date Range will be retrieved from QuickBooks
  - c. Click “Get Open Sales Orders”



2. The Sales Orders that match your date range and customer selections will be displayed in the grid. Use the To Be Invoiced checkboxes to select the orders that you would like to invoice. Sales Orders that are “Checked” will be invoiced in QuickBooks.

	To Be Invoiced	Customer:Job	Date	Number	Customer PO #	Sales Rep	Sales Order Total
	<input checked="" type="checkbox"/>	Thompson Lighting Stor...	12/2/2018	145		MK	\$4,850.00
	<input type="checkbox"/>	Baker's Professional Lig...	12/2/2018	146		JG	\$8,225.00
	<input type="checkbox"/>	Kem Lighting Warehou...	12/4/2018	148	999011a	MK	\$6,392.00
	<input type="checkbox"/>	Thompson Lighting Stor...	12/5/2018	149		MK	\$18,119.00
	<input type="checkbox"/>	Baker's Professional Lig...	12/7/2018	151		JG	\$19,692.00
	<input type="checkbox"/>	Baker's Professional Lig...	12/7/2018	152		JG	\$1,144.00

\*You can use the **Select All** button to select or unselect ALL of the Sales Orders that were retrieved from QuickBooks.



# Batch Invoice Sales Orders User Guide

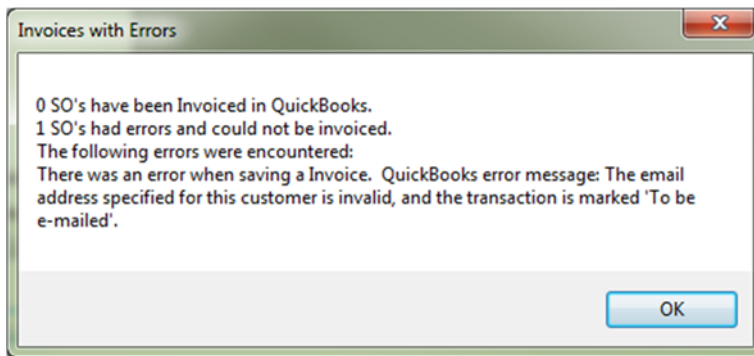
---

## Setting your Invoice Options

### Marking To Be Emailed

If you check the box “Mark Invoices To Be Emailed” then the invoices that are created will automatically be flagged as “To Be Emailed” in QuickBooks.

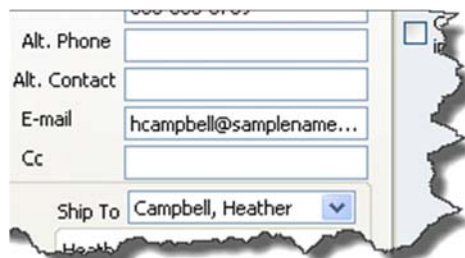
**NOTE: There must be an Email Address saved to the Customer in QuickBooks to use this checkbox.** If you try to Mark Invoices To be Emailed where there is no customer email address you will see this message:



To resolve this: Add the customer’s email address to the **Customer** in QuickBooks, then try to create the invoice(s) again.

To update the Customer’s email address in QuickBooks:

1. In QuickBooks click “Customers” and select Edit Customer for the customer that you would like to update.
2. Enter a valid email address in the Email field



To Email Invoices from QuickBooks go to FILE > SEND FORMS in QuickBooks.



# Batch Invoice Sales Orders User Guide

---

## Marking To Be Printed

If you check the box “Mark Invoices To Be Printed” then the invoices that are created will automatically be flagged as “To Be Printed” in QuickBooks.

To Print Invoices from QuickBooks go to FILE > PRINT FORMS > INVOICES in QuickBooks.

## Setting the Invoice Date

1. Enter Date that you want to show on the invoices that will be created from the Sales Orders you’ve selected.

A screenshot of a software interface for batch processing. At the top is a 'Select All' button. Below it are three checkboxes: 'Mark Invoices To Be Emailed', 'Mark Invoices To Be Printed', and 'Use SO # as Invoice #'. The 'Invoice Date' field, which contains '10/27/2014' and a calendar icon, is circled in red. At the bottom is an 'Invoice Sales Orders' button.

## Use SO # as Invoice #

You can check the box “Use SO # as Invoice #” if you want the Invoice number to match the Sales Order number in QuickBooks.

If you do not check this box, the QuickBooks will assign the next new number in your invoice number sequence to the invoices.

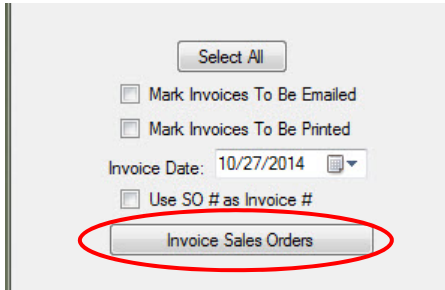


# Batch Invoice Sales Orders User Guide

---

## Updating QuickBooks

1. To create invoices in QuickBooks, click "Invoice Sales Orders"



For information or help with the Batch Invoice Sales Orders utility please visit our website at [www.QButility.com](http://www.QButility.com), or email us [support@qbutility.com](mailto:support@qbutility.com).

**Thank you for using the Batch Invoice Sales Orders Utility!**