



Sales & Invoicing

WR Ltd – ERP Cloud Solution
User Training – Sales and Invoicing



AGENDA

- ① SALES MANAGEMENT FOOTPRINT
- ② SALES QUOTATION
- ③ PRODUCT & PRICING
- ④ INVOICING
- ⑤ SERVICE PRODUCT
- ⑥ SUBSCRIPTION PRODUCT



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Sales Management Footprint

SALES MANAGEMENT FOOTPRINT



Manage product and services, create quotation, implement effective sales planning processes, manage Pricelist, commission & incentive management.

Sales Management Footprint

Marketing Planning	Sales Planning	Sales Management	Sales Performance
<ul style="list-style-type: none">▪ Business Strategy Review▪ Competitive Analysis▪ Customer Behavior	<ul style="list-style-type: none">▪ Salesforce Management▪ Channel Strategy▪ Sales Budget▪ Product Marketing Strategy▪ E-commerce Business Strategy	<ul style="list-style-type: none">▪ Sales Process▪ Discount Management▪ E-Commerce Process	<ul style="list-style-type: none">▪ Sales Model Review (ROI)▪ Customer Satisfaction



2

Sales Quotation



SALES QUOTATION

How to create your first quotation and apply discount on sales order line?

Allowing discounts on quotations is a common sales practice to improve the chances to convert the prospect into a customer.

In **Sales** application → **Configuration** → **Settings**

→ **Quotations & Sales**

→ **Discount**

→ **Allow discounts on sales order lines** → **Apply**

Discount

No discount on sales order lines, global discount only

Allow discounts on sales order lines

Create quotation in **Sales** application → **Quotations** → **Create**

Customer from the dropdown list → under **order lines** tab → **Add an item** and select product



SALES QUOTATION

→ Add **Ordered Qty** & **Discount (%)** if applicable.

Send by Email | Print | Confirm Sale | Cancel

Quotation | Quotation Sent | Sales Order

New

Customer | WR Ltd | **Order Date** | 08/10/2019 12:54:29

Expiration Date | **Payment Terms**

Order Lines | Other Information

Product	Description	Ordered Qty	Unit of Measure	Unit Price	Taxes	Discount (%)	Subtotal
+ [CONS_DELO1] Server	[CONS_DELO1] Server raid 10 2048ECC ram	2.000	Unit(s)	1,900.00		40.00	2,280.00

Add an item

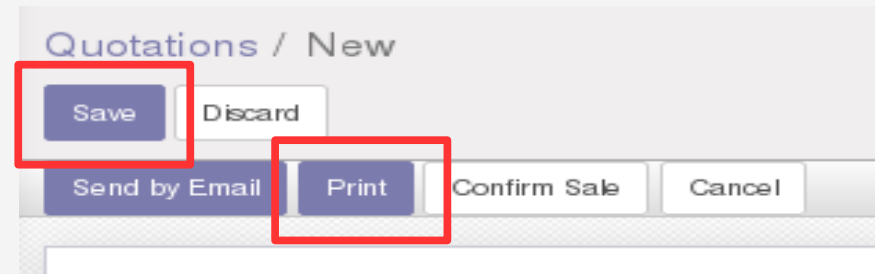
To add a new customer, click on the **Customer** drop-down menu and click on **Create and edit** → then fill in name, address, phone, email ..etc.

To add a new product, under Order Line, click on **Add an item**, click on **Create and Edit** → then fill in Product name, type, sale price, invoicing policy ..etc.



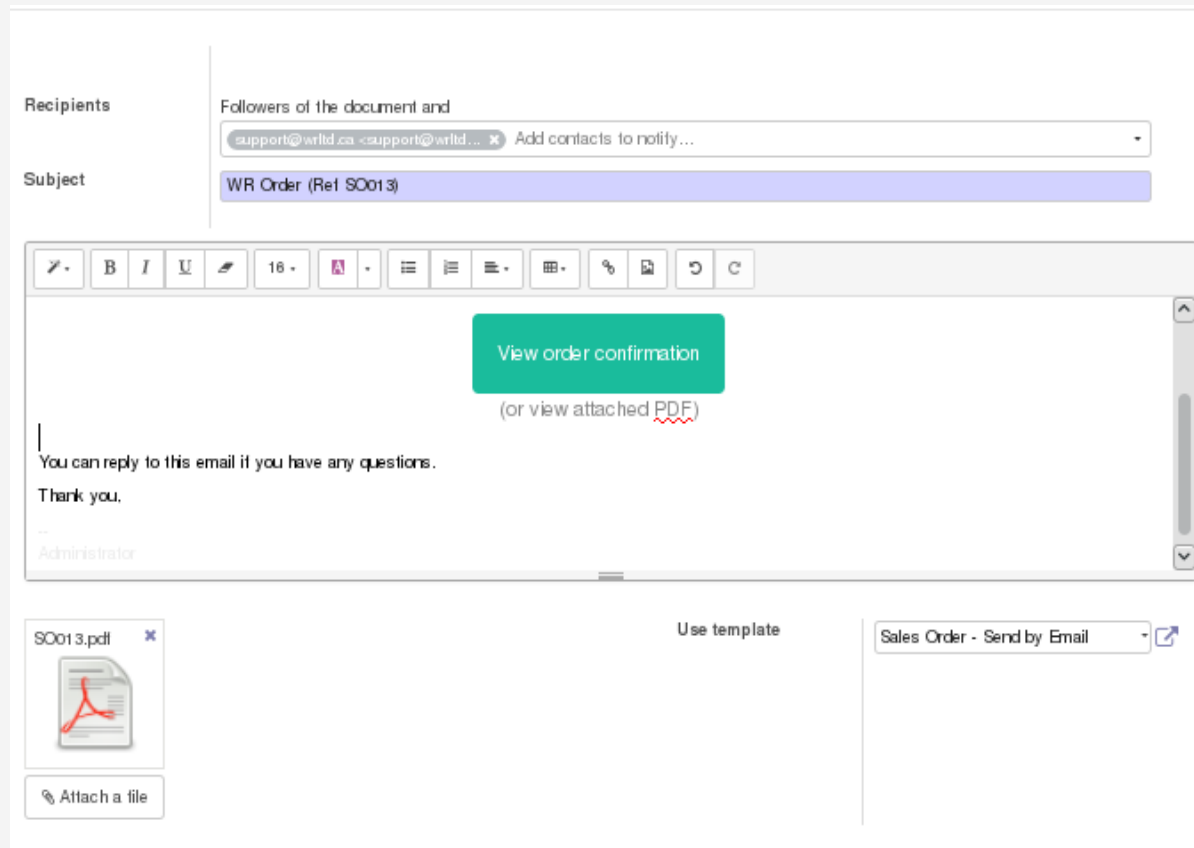
SALES QUOTATION

You can review your quotation before sending it to customer → Click **Save** button → then **Print**, new pop-up window will open.



*Sending Quotation to customer → Click **Print** → Save it to your local PC, quote will be saved in PDF format.*

*Send it by Email → Click **Send by Email** → Email form will open in new window (make sure that you have added customer email address).*






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Product & Pricing



PRODUCT & PRICING

In your quotation, specific price can be applied per customer segment, or you can use formula to apply discount & margin.

To activate **Advanced Pricing** feature → in **Sales** application → under **Pricing** section → select **Specific prices per customer segment, currency, etc.** → then **Apply** to  changes.



Pricing

Sale Price

- A single sale price per product
- Specific prices per customer segment, currency, etc.
- Advanced pricing based on formulas (discounts, margins, rounding)

Setting up new **Pricelists** → in **Sales** application → **Configuration** → **Pricelists** (*Pricelist can be assigned to country group, customer, Product*)



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Invoicing



INVOICING

How to generate and send **Pro-Forma** invoice to buyer/ customer?

First someone might ask, what is **Pro-Forma**? **Pro-Forma** is preliminary invoice of sale sent to buyers in advance of a shipment or delivery of goods. The invoice will typically describe the purchased items.

In **Accounting** application → **Configuration**
→ **Settings** → under **Invoicing & Payments**
→ check the box **Allow pro-forma invoices**

Invoicing & Payments

Customer	<input checked="" type="checkbox"/> Allow pro-forma invoices
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In most companies, sales people create quotation that become a sales order once they are validated. Then, draft invoices are created based on the sales order. You have different options like:

- Invoice manually
- Invoice before delivery
- Invoice based on delivery order



INVOICING

In most companies, sales people create quotation that become a sales order once they are validated. Then, draft invoices are created based on the sales order. You have different options like:

- Invoice manually: trigger invoice from sales order
- Invoice before delivery: Invoice the full order before triggering the delivery order
- Invoice based on delivery order

Invoice before delivery is usually used by the eCommerce application when the customer pays at the order and we deliver afterwards.

You can change the invoicing policy setting:

in **Sales** application → **Sales**

→ **Products**

→ under **Invoicing** tab

→ **Invoicing Policy** → **Ordered quantities/ Delivered quantities**



Invoicing Policy

Invoicing Policy	Delivered quantities
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Service Product



SERVICE PRODUCT

There are different kind of service sales: prepaid volume of hours/days (e.g. support contract), billing based on time and material (e.g. billing consulting hours) or a fixed price contract (e.g. a project).

Milestone based invoicing is usually used in large project, invoice will be sent to customer each time milestone is completed and work accepted by customer. You can also use milestones to invoice percentages of the entire project (based on agreed **Payment Terms**)

In order to be able to invoice a product, you need to set up the Accounting application and to configure an accounting journal and a chart of account.

Note: advanced features to invoice based on Projects and man-hours (timesheet), invoice will be created only for the completed work. The following basic steps to configure **timesheet invoicing**
Create new service **Product** → **Invoice Policy** based on **Delivered quantities** → **sales Timesheet** → **Product** → **Invoicing** → **Track Service** → **Create a task and track hours**



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Subscription Product



SUBSCRIPTION PRODUCT

Automate your recurring sales and subscriptions, create and manage service contract, automated your invoices and payment.

How to setup subscription service? First create new product → In **Sales** application → **Sales** → **Products** → product type **Service** →

The screenshot shows a product creation interface. At the top left, there is a product name field containing 'Monthly Subscription'. Below it are two checked checkboxes: 'Can be Sold' and 'Can be Purchased'. To the right, there are three status indicators: 'Active' (green), 'Unpublished On Website' (red), and '0 Purchases' (shopping cart icon). Below these is another indicator: '\$ 0 Sales' (dollar sign icon). A red box highlights the 'General Information' tab in the navigation bar. The main form area is divided into two columns. The left column contains: 'Product Type' (Service), 'Internal Reference' (empty), 'Barcode' (empty), and 'Internal Category' (All). The right column contains: 'Sale Price' (67), 'Cost' (0.00), 'Unit of Measure' (Monthly), 'Purchase Unit of Measure' (Monthly), and 'Control Purchase Bills' (radio buttons for 'On ordered quantities' and 'On received quantities').

Product Name	Monthly Subscription	Active	Unpublished On Website	0 Purchases
Can be Sold	<input checked="" type="checkbox"/>			\$ 0 Sales
Can be Purchased	<input checked="" type="checkbox"/>			

General Information | Inventory | Sales | Variants | Invoicing | Notes

Product Type: Service

Internal Reference:

Barcode:

Internal Category: All

Sale Price: 67

Cost: 0.00


Unit of Measure: Monthly

Purchase Unit of Measure: Monthly


Control Purchase Bills: On ordered quantities On received quantities



SUBSCRIPTION PRODUCT

Setting up subscription → in **Sales** application → **Sales** → **Contracts** →  new contract → fill in form details → Contract Name → select **Customer**

Make sure **Generate recurring invoices automatically** is checked → set invoice recurring interval **Repeat Every** (Daily, Weekly, Monthly, Yearly) and update invoice dates accordingly.

under **Invoice Lines** tab **Add an item** → select service product “ERP Cloud Monthly Subscription” service we just created → 

ERP Cloud Monthly Subscription Active Cost/Revenue Productions

Use Tasks Use Issues

Reference: Tags:

Customer: **InfoTech**

Recurring Invoices

Generate recurring invoices automatically [Create invoices](#) → [Show recurring invoices](#)

Contract Template:

Journal: **Customer Invoices (USD)** Pricelist: **Public Pricelist (USD)**

Repeat Every: **1** **Month(s)** Type: **Invoice**

Date Start: **08/01/2019** Invoicing type: **Pre-paid**

Date of Next Invoice: **07/31/2020** Date End: **07/31/2020**

Product	Description	Quantity	Unit of Measure	Auto-price?	Unit Price	Discount (%)	Sub Total	Analytic Tags
Monthly Subscription	Monthly Subscription	1.00	Monthly	<input type="checkbox"/>	67.00	0.00	67.00	



Thank you