

# Bundle Documentation

## eMprove Invoice Consolidation

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## Overview

The eMprove Consolidated Invoice bundle includes functionality that will allow users to consolidate invoices and collect payment for the consolidated invoice.

***This application does not affect the General Ledger***

This application requires a key to access. Contact [Jeremy.McCourt@eMergeTech.com](mailto:Jeremy.McCourt@eMergeTech.com) to inquire about getting this license.

## Bundle Installation

To find and install the bundle on your NetSuite environment go to:

Customization → SuiteBundler → Search and Install Bundles.

Once there, search for bundle ID “226987.”

Click the name, “eMprove Invoice Consolidation.”

Then click “Install”

## Set Up and Navigation

### Configuration:

The eMprove Consolidated Invoice application is configured by entering values into a custom record called eMprove Consolidated Invoice Config.

1. Navigate to eMprove Consolidated Invoice → Consolidated Invoice Configuration



2. Populate the fields in the following screen:

**eMprove Consolidated Invoice Config**

Save | Cancel | Change ID | Actions ▾

INACTIVE

LICENSE NUMBER

AUTHOR EMAIL

<Type then tab>

MERGE INVOICE ITEMS

- **License Number:** A valid license is required to use the eMprove Consolidated Invoice application. Contact [info@emergetech.com](mailto:info@emergetech.com) for a license

- **Email Author:** The eMprove Consolidated Invoice bundle will at times send out email notifications. It is a requirement that all emails have an author, so one must be configured.
- **Merge Invoice Items:** Determines if Items should be grouped by Item name/id on the Consolidated Invoice. If an item is repeated multiple times on invoices those items would be grouped together if this checkbox is checked

### Bundle Navigation Links:

The eMprove Invoice Consolidation bundle will create two navigation links in your NetSuite account. Both links are configured by default to be viewed by any role that has a Classic Center or an Accounting Center.

1. **Consolidated Invoices** – List of all previously consolidated invoices
  - a. Classic Center navigation: Transactions → Sales → Consolidated Invoices
  - b. Accounting Center navigation: Customers → Sales → Consolidated Invoices
2. **Create Consolidated Invoices** - Navigates to the search/Invoice Consolidation screen.
  - a. Classic Center navigation: Transactions → Sales → Create Consolidated Invoices

### Enable additional centers to view the links:

1. **Consolidated Invoices:** This link is configured on the “Consolidated Invoice” custom record:
  - a. Navigate to Customization → List, Records & Fields → Record Types and Edit the “Consolidated Invoice” custom record

### Consolidated Invoice

Save | Cancel | Change ID | Actions

NAME \* Consolidated Invoice

ID customrecord\_consolidated\_inv\_header

INTERNAL ID 594

OWNER Abigail Limpioso

DESCRIPTION

SHOW CREATION DATE ON RECORD ON LIST

SHOW LAST MODIFIED ON RECORD ON LIST

SHOW OWNER ON RECORD ON LIST ALLOW CHANGE

ACCESS TYPE No Permission Required

ALLOW UI ACCESS

ALLOW MOBILE ACCESS

ALLOW ATTACHMENTS

SHOW NOTES

ENABLE MAIL MERGE

RECORDS ARE ORDERED

SHOW REMOVE LINK ALLOW CHILD RECORD EDITING ALLOW DELETE

ALLOW QUICK ADD

ENABLE SYSTEM NOTES

INCLUDE IN GLOBAL SEARCH

INCLUDE IN SEARCH MENU

ENABLE OPTIMISTIC LOCKING

ENABLE INLINE EDITING

ENABLE NAME TRANSLATION

HIERARCHY

INACTIVE

Fields Subtabs Sublists Icon Numbering Forms Online Forms Permissions **Links** Managers Translation Child Records Parent Records History System Notes

CENTER *	SECTION *	CATEGORY	LINK	LABEL	TRANSLATION	INSERT BEFORE
Classic Center	Transactions	Sales	Consolidated Invoice			
Accounting Center	Customers	Sales	Consolidated Invoice			
		Custom	Consolidated Invoice			

b.

2. **Create Consolidated Invoices:** This link is configured on the “Consolidated Invoice – Suitelet” script record:

- a. Navigate to Customization → Scripting → Scripts → Filter Type = “Suitelet. Select the “Consolidated Invoices - Suitelet” script.
- b. Navigate to the Deployments tab then select the deployment.
- c. Select the Link tab:

### Script Deployment

Save | Cancel | Change ID | Actions

SCRIPT Consolidated Invoices - Suitelet

TITLE \* Consolidated Invoices - Suitelet

ID customdeploy\_consolidated\_invoices\_ui

DEPLOYED

STATUS \* Released

EVENT TYPE

LOG LEVEL Debug

EXECUTE AS ROLE Administrator

AVAILABLE WITHOUT LOGIN

URL /app/site/hosting/scriptlet.nl?script=786&deploy=1

Audience Links Execution Log System Notes

CENTER *	SECTION *	CATEGORY *	LABEL *	TRANSLATION	INSERT BEFORE
Classic Center	Transactions	Sales	Create Consolidated Invoices		
Accounting Center	Customers	Sales	Create Consolidated Invoices		

d.

## Using the Consolidated Invoice Application

### Custom Fields

The eMprove Invoice Consolidation Bundle creates two customer fields that are added to the Invoice.

1. **Invoice Tracker #:** An optional value that can be used to identify invoices that should be consolidated. All invoices with the same Invoice Tracker # can be consolidated together. On the “Create Consolidated Invoices” screen, you have the ability to search for all invoices with that tracker number.
2. **Invoice Consolidated:** indicates if an invoice has been previously consolidated. If the invoice has been consolidated, “Invoice Consolidated” will show as checked and won’t show up on “Create Consolidated Invoices” screen.

The screenshot shows the 'Invoice' application interface for invoice INV473. The 'Primary Information' section includes fields for INVOICE #, CONSTITUENT, SUBSIDIARY, PROJECT, DEVELOPMENT REP, DATE, DUE DATE, POSTING PERIOD, APPEAL, and CAMPAIGN. A 'Summary' table on the right shows: SUBTOTAL 608.00, TAX TOTAL 8.00, TOTAL 608.00, and AMOUNT DUE 608.00. Two custom fields are highlighted with red boxes: 'INVOICE CONSOLIDATED' (checked) and 'INVOICE TRACKER #'.

*Note: the custom fields locations may vary. By default, these fields will be under the Custom tab.*

## How to Consolidate Invoices

1. Navigate to the “Create Consolidated Invoices” screen
2. Check “Add Invoice” next to all the Invoices you would like to consolidate.  
To find the Invoices you would like to consolidate, you have the option of searching by date range, tracker number or customer. At the top of the screen, you would just need to populate the appropriate fields and press the “Search Invoices” button at the top. Invoices from different customers can be processed in the same run but each customer will generate one consolidated invoice.

Create Consolidated Invoice More

INVOICE TRACKER #  TO DATE   
 FROM DATE  CUSTOMER

Items

ADD INVOICE	TRANSACTION #	CUSTOMER	INVOICE TRACKER #	INVOICE TRANSACTION DATE
<input type="checkbox"/>	INV0001943	SM		5/1/2014
<input checked="" type="checkbox"/>	INV0001283	Academy Avenue Liquor Store		4/5/2014
<input checked="" type="checkbox"/>	INV0001282	Academy Avenue Liquor Store		5/11/2014
<input checked="" type="checkbox"/>	INV0001385	Academy Avenue Liquor Store		5/20/2014
<input checked="" type="checkbox"/>	INV0001254	Academy Avenue Liquor Store		6/5/2014
<input type="checkbox"/>	INV0001283	ACM Group		5/15/2014
<input type="checkbox"/>	INV0001799	Acme Systems Incorporated		5/22/2013
<input type="checkbox"/>	INV0001238	Acme Systems Incorporated		5/1/2014
<input type="checkbox"/>	INV0001241	Acme Systems Incorporated		5/11/2014
<input type="checkbox"/>	INV0001811	Acme Systems Incorporated		5/15/2014
<input type="checkbox"/>	INV0001242	AuVision Eye Centre		4/11/2014

3. Once all the Invoices you want to consolidate are checked, press the “Consolidate Invoices” button at the top. You will then be redirected and receive an email with the links to your Consolidated Invoices or if there are issues consolidated, an email will be sent to you with the error message.

### Invoices are being Processed

[Return To Consolidate Invoices Form](#)

You will receive an email regarding the status of your Consolidated Invoice(s) when all invoices have been successfully processed.

## How to Print Consolidated Invoice

1. Navigate to a Consolidated Invoice record.
2. Press the Print Icon button shown below. The bundle includes a default PDF template called *Consolidated Invoice PDF/HTML Template*.

**Consolidated Invoice** ← → List Search

[Full](#) [Back](#) [Accept Payment](#) 🖨️ [Actions +](#)

<input type="checkbox"/> INACTIVE DOCUMENT NUMBER: C0204 CUSTOMER: B-Sharp Music BILL TO: B-Sharp Music, 1215 Hastings St, San Francisco CA US SHIP TO: B-Sharp Music, 1215 Hastings St, San Francisco CA US	CURRENCY: USA SHIPPING METHOD: Pick-up at store SHIPPING DETAILS: SHIPPING COST: 8.00 EXCHANGE RATE: 1.00 DUE DATE: 4/13/2014 SALES REP:	TERMS: 000 INCO-TERMS: SUBSIDIARY: Honeycomb Holdings Inc.   Honeycomb Mfg. SUBTOTAL: 484,940.00 TAX: 38,443.40 TOTAL: 523,383.40 TRACKING NUMBER:
--	--	--

EDIT	ITEM #	QUANTITY	RATE	AMOUNT	PRICE P
	SHC0001	1	112.99	381,200.00	Invoice INV00281330

[Full](#) [Back](#) [Accept Payment](#) 🖨️ [Actions +](#)

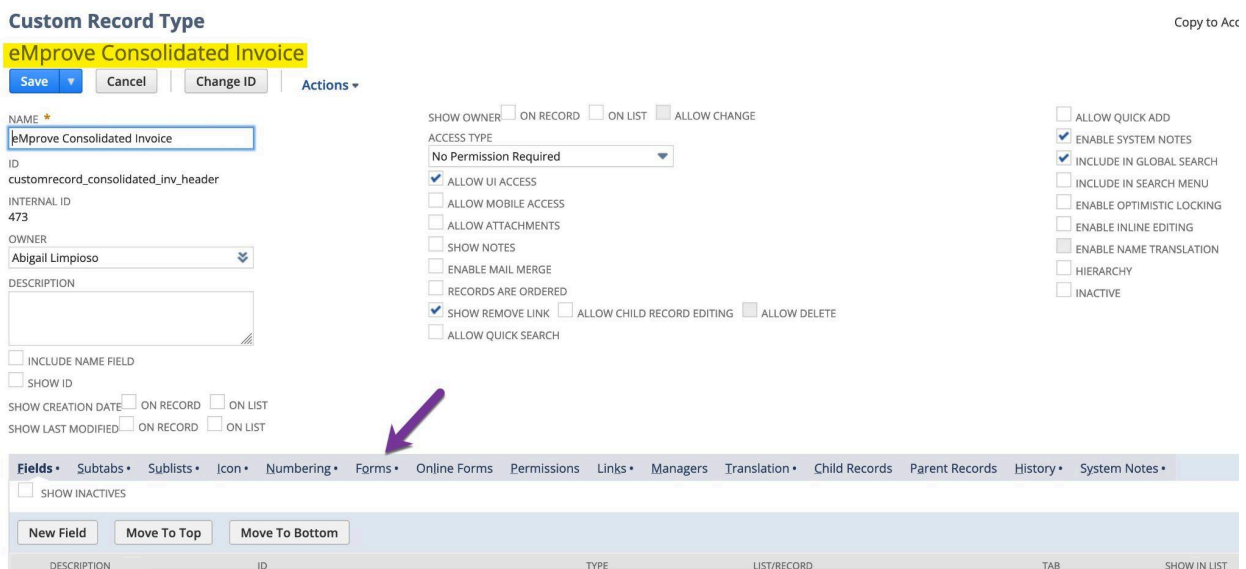


# How to Customize the Consolidated Invoices PDF used for Printing

The printing of the Consolidated Invoice is done by using an Advanced PDF/HTML.

**Note:** Do not directly edit the default PDF template called *Consolidated Invoice PDF/HTML Template*. Rather make a copy and edit the copy. If the default template is edited it could be overwritten when the bundle is updated.

1. The default template can be found by navigating to Customization → Forms → Advanced PDF/HTML
2. Copy the *Consolidated Invoice PDF/HTML Template* and edit your copy. Do not change the references to the field ids.
3. Add your edited template to the form of the eMprove Consolidated Invoice custom record:



**Custom Record Type** Copy to Acc

**eMprove Consolidated Invoice**

Save | Cancel | Change ID | Actions

NAME \*  
eMprove Consolidated Invoice

ID  
customrecord\_consolidated\_inv\_header

INTERNAL ID  
473

OWNER  
Abigail Limpioso

DESCRIPTION

INCLUDE NAME FIELD  
 SHOW ID  
SHOW CREATION DATE  ON RECORD  ON LIST  
SHOW LAST MODIFIED  ON RECORD  ON LIST

SHOW OWNER  ON RECORD  ON LIST  ALLOW CHANGE

ACCESS TYPE  
No Permission Required

ALLOW UI ACCESS  
 ALLOW MOBILE ACCESS  
 ALLOW ATTACHMENTS  
 SHOW NOTES  
 ENABLE MAIL MERGE  
 RECORDS ARE ORDERED  
 SHOW REMOVE LINK  ALLOW CHILD RECORD EDITING  ALLOW DELETE  
 ALLOW QUICK SEARCH

ALLOW QUICK ADD  
 ENABLE SYSTEM NOTES  
 INCLUDE IN GLOBAL SEARCH  
 INCLUDE IN SEARCH MENU  
 ENABLE OPTIMISTIC LOCKING  
 ENABLE INLINE EDITING  
 ENABLE NAME TRANSLATION  
 HIERARCHY  
 INACTIVE

Fields • Subtabs • Sublists • Icon • Numbering • **Forms** • Online Forms • Permissions • Links • Managers • Translation • Child Records • Parent Records • History • System Notes •

SHOW INACTIVES

New Field | Move To Top | Move To Bottom

DESCRIPTION	ID	TYPE	LIST/RECORD	TAB	SHOW IN LIST
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Edit the form and select your edited template

### Custom Entry Form

|

NAME \*

ID  
custform\_176\_t1209691\_121

TYPE  
Custom Record

RECORD TYPE  
eMprove Consolidated Invoice

PRINT TEMPLATE



- INACTIVE
- ENABLE FIELD EDITING ON LISTS
- STORE FORM WITH RECORD
- FORM IS PREFERRED
- USE FOR POP-UPS  POPUP ONLY

For assistance, please contact us at: [support@emergetech.com](mailto:support@emergetech.com)