Bundle Documentation

eMprove Invoice Consolidation

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Overview

The eMpove 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 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."

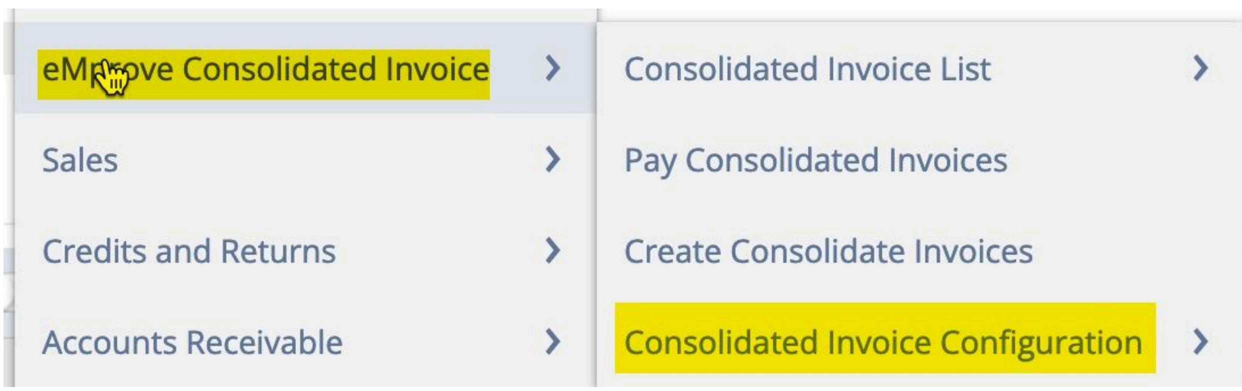
Then click "Install"

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:

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

- **Email Author:** The eMpove 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

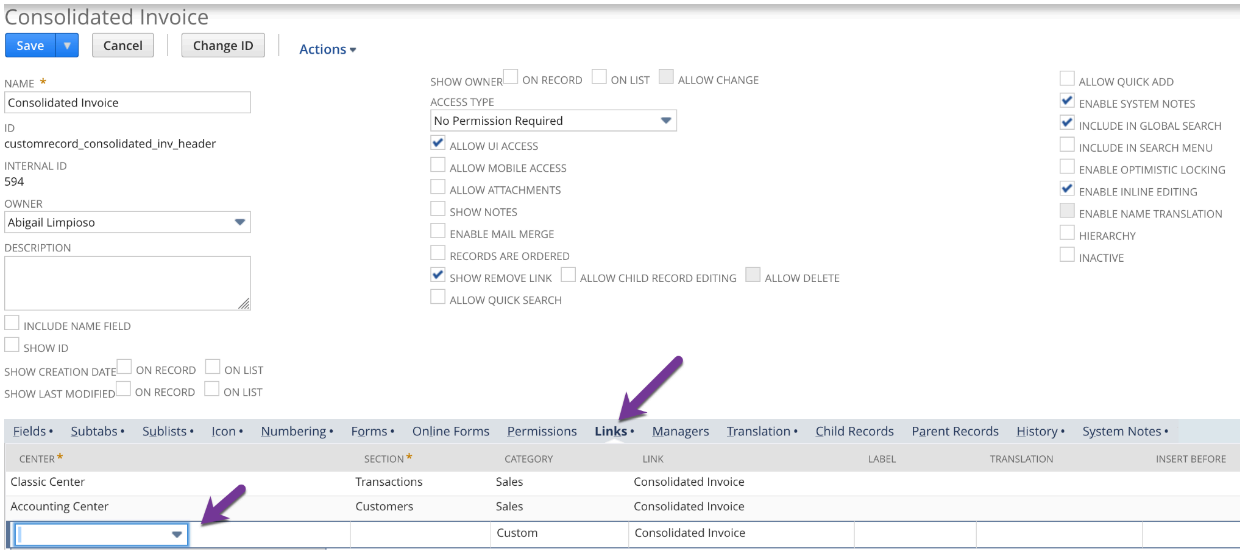
Bundle Navigation Links:

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

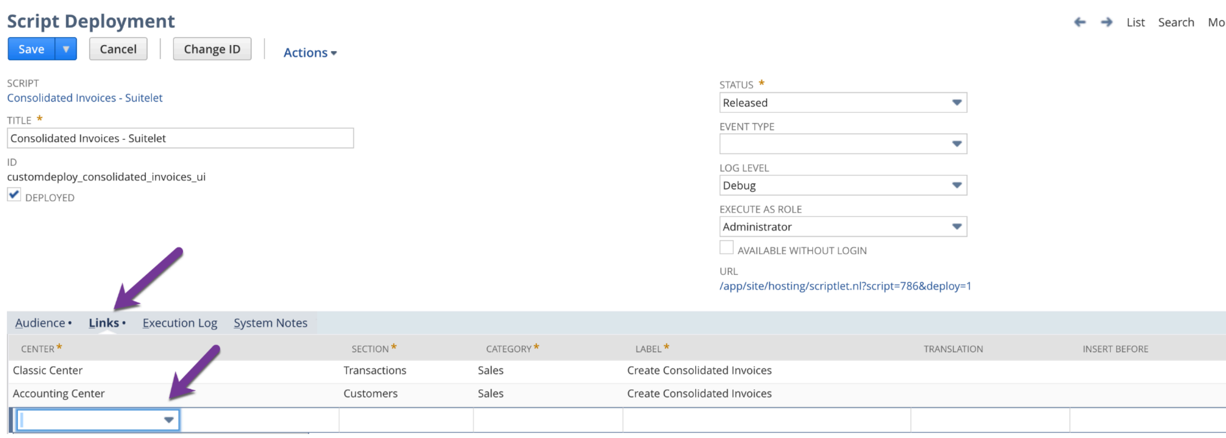
Enable additional centers to view the links:

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



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:



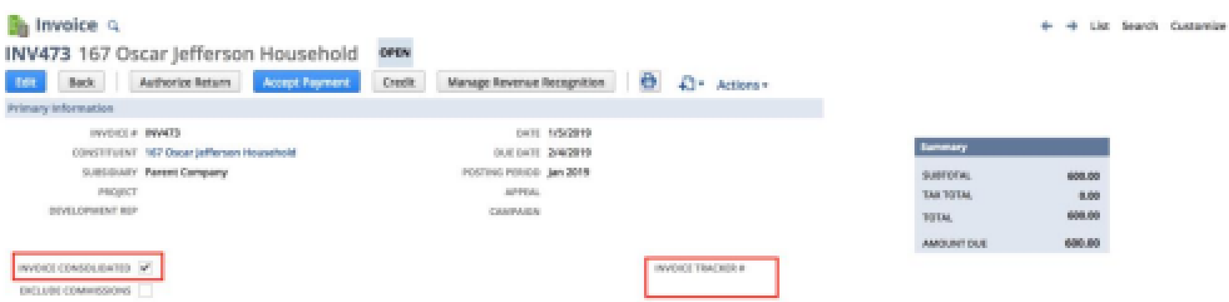
d.

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.

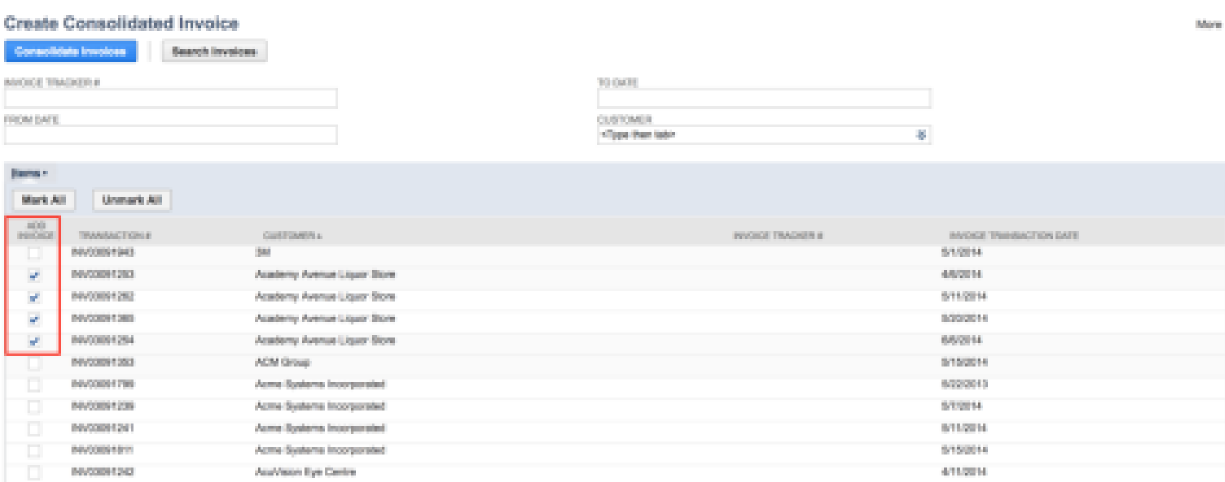


Note: the custom fields locations may vary. By default, these fields will be under the Custom tab.

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.



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.

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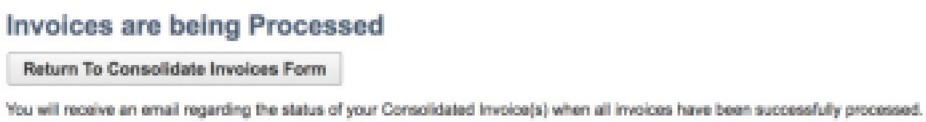
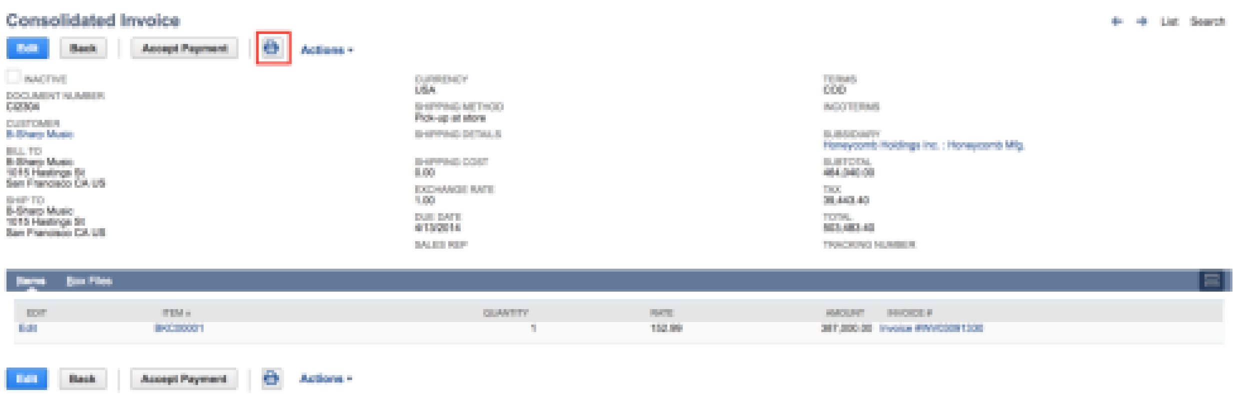


How to Print Consolidated Invoice

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.*

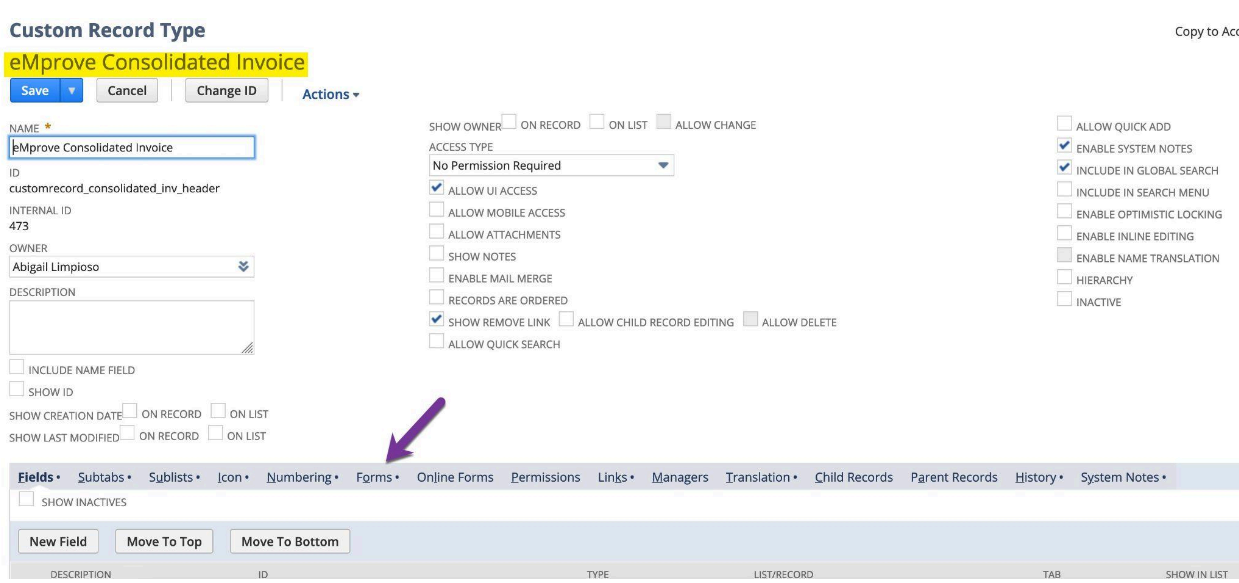


How to Customize the Consolidated Invoices PDF used for Printing

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:



Edit the form and select your edited template

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For assistance, please contact us at: support@emergetech.com