

Invoice a Booking

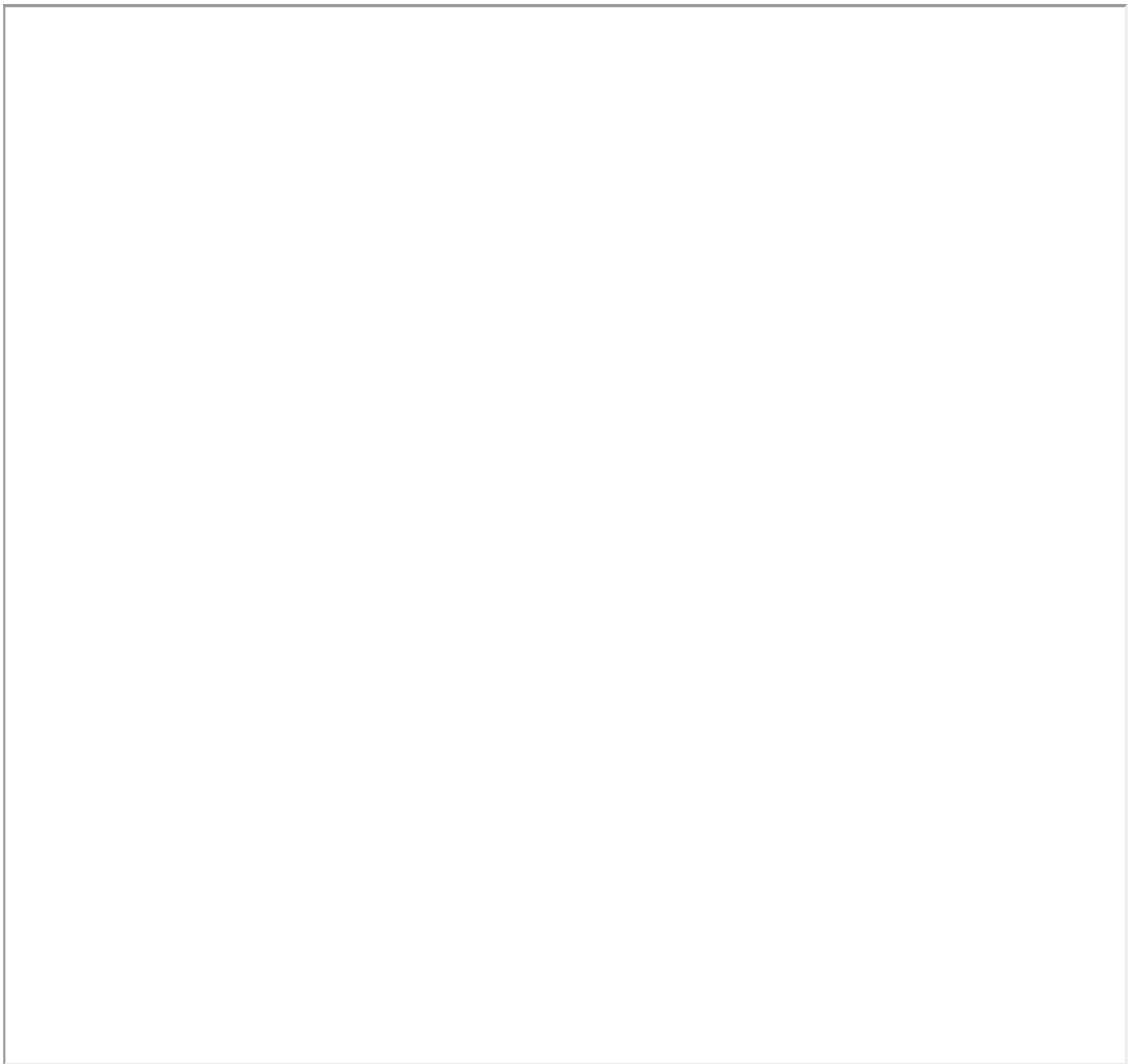
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Invoice a Booking / Project





Multi Stage Invoicing

Multi Stage Invoices are used when the customer is billed in stages (eg. 50% on order and 50% on delivery). (Note: This functionality is driven by parameter settings in RentalPoint, see below 'Multi-Stage Invoice Setup' below for more information on activating the functionality in RentalPoint.)

Adding an Invoice Stage

Open the booking to the payments tab, then follow the instructions below



RP Modify booking

Out 10/04/19 0800 In 10/07/19 1400 MYTEST00105 Location 0 - Toronto

Customer Calendar Venue Equipment Crew Notes **Payments** Attachments Other Details Status Follow up

Payment

Payment Terms
30 day account

Payment Options
Prompt for Payment on Invoicing

Payment Method Surcharge %
0.00

Terms for Multiple Stage Invoicing
<none> Default

Balance
Total Price 148.00 Minus Payments 0.00 Enter a payment Balance 148.00

Click to add Invoice stages to the booking

OR click to pull default Invoice stages from the customer record

Toggle between amount or percentage for stage calculation

RP Setup Payment Terms

\$ %

Invoice Stage Name	Percentage
First	50.00
Final	50.00

Invoice Stage Name Percentage

0 %

Amount Not Applied 0.00 %

Total 100.00 %

[What is this?](#)

1. Click NEW to add a new stage

2. Click to save the stage

Once the stages have been added they will show up in the booking

Modify booking

Out 10/04/19 0800 In 10/07/19 1400 MYTEST00105 Location 0 - Toronto

Customer Calendar Venue Equipment Crew Notes Payments Attachments Other Details

Payment

Payment Terms
30 day account

Payment Options
Prompt for Payment on Invoicing

Payment Method Surcharge %
0.00

Invoice Stages

Invoice Stage	Percent	Amount	Invoiced	Invoice No.	Invoiced
First	50.00%	74.00	No		
Final	50.00%	74.00	No		

Shows breakdown for each invoice stage
Invoice number will show up here as each stage is invoiced

Terms for Multiple Stage Invoicing
50.00%/50.00% Default

Balance

Total Price	Minus Payments	Balance
148.00	0.00	148.00

Enter a payment

Credit
Shows summary of Invoice stages

Stage Invoice a Booking

From the booking grid..


First highlight the booking then use one of the three options below to process your invoice

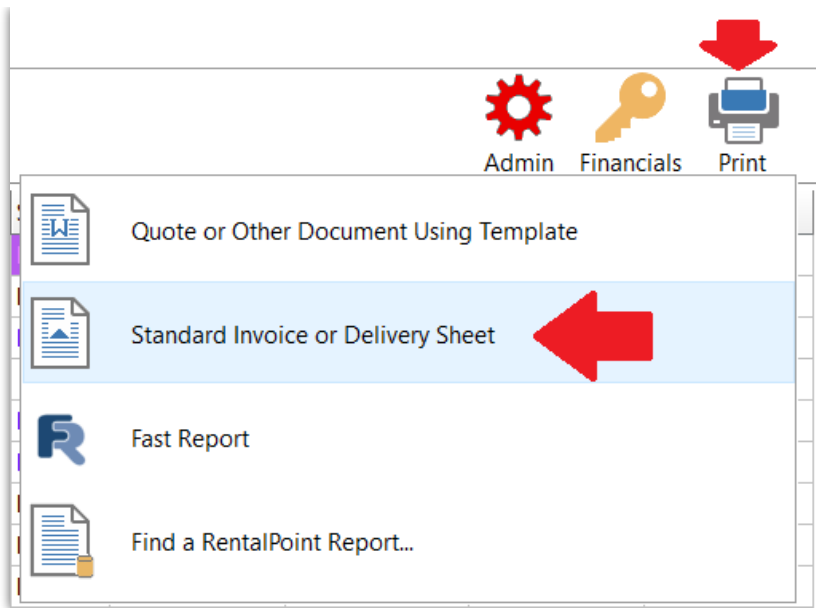
1. Hit F6
2. Right click on the booking then Print Invoice or Delivery Sheet

MYTEST00105	MYTES	New		Fri	10-4-2019	08:00	Gibson Wedd
MYTEST00113	MYTES	Find		Tue	10-8-2019	19:20	test Show
WATBUS00004	Waterlo	Open	ST	Tue	10-22-2019	09:00	Gibson Wedd
WATBUS00005	Waterlo	View	ST	Wed	10-30-2019	18:01	Gibson Wedd
WATBUS00006	Waterlo	Work		Wed	10-30-2019	18:01	Gibson Wedd
CONCRTAV00008	Concert	Admin	DOFM	Mon	11-11-2019	08:00	Gibson Wedd
WATBUS00007	Waterlo	Financials		Tue	11-12-2019	08:11	MyChow
WATBUS00008	Waterlo	Print					
		Print (Fast Report)					

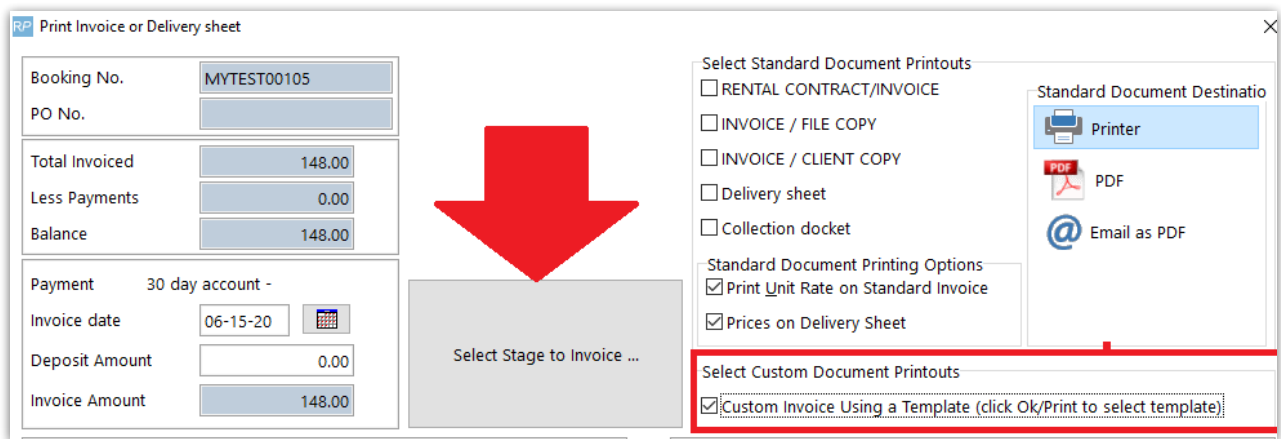
Invoice or Delivery Sheet F6

Invoice Batch

3. Use the  icon from the top menu bar



FIRST, ensure Custom Document is selected, then select stage to invoice per screen shot below



Check the box beside the stage you want to invoice, then print

RP Print Invoice or Delivery sheet

Booking No.	MYTEST00105	Stage Name	Stage Amount	Invoiced Amount	✕
PO No.		<input checked="" type="checkbox"/> First	74.00	0.00	
		<input type="checkbox"/> Final	74.00	0.00	

Total Invoiced	148.00
Less Payments	0.00
Balance	148.00

Payment 30 day account -

Invoice date 06-15-20

Deposit Amount 0.00

Invoice Amount 148.00

Customer Contact Support Test

Booking Contact Support Test

Customer Company MYTEST

Address postal 1

Address Line 2 postal 2

City test State myseta

Zip code

Phone 1 gg 905 693 9457

Venue

Delivery to

Room

Street address

Address Line 2

City State

Zip code

Phone 1

Identify

Less <<

Re-Print Invoice

Batch Delivery

Blank Form

Ok/Print

Close

Select a template, then choose your output medium from the right hand panel

RP Print Custom Invoice - MYTEST00079

Report Filename

- Deposit Invoice_GdocsF.rtf
- FinalInvoice_GdocsF.rtf
- Invoice_GdocsF.rtf

Note: You will need to use a custom template with insertfields &stgNameC& and&StgAmtDN& to show the stage invoice name and stage invoice Amount respectively. Please contact support@rentp.com if you need assistance modifying your custom template.

- Print
- Save as PDF
- Open in Word Processor
- Save as Doc
- Email Doc as attachment
- Email PDF as attachment

Sample Output Invoice



E av LLC
P.O. Box 126b
Phoenix, AZ 81051
Ph: (800) 123-4567
Fax: (624) 123-4568

Deposit Invoice: 210.00
Job: MYTEST00105
Date: 06/15/20
P.O. #:
Ship to:

Attn:

INVOICE TO
MYTEST
Support Test
mytest
Milton
L9T 4Z9

Salesperson	Date Complete	Job Description	Terms
RP	10/07/19	Gibson Wedding	30 day account

Summary Of Charges

Equipment Total:	\$48.00
Re-Sales total:	\$0.00
Labor Total:	\$0.00
Total Discount:	\$178.00
Total Charges:	\$148.00

This order requires a deposit of 50%

Please remit \$74.00 upon receipt of this invoice.

Total Due: \$74.00

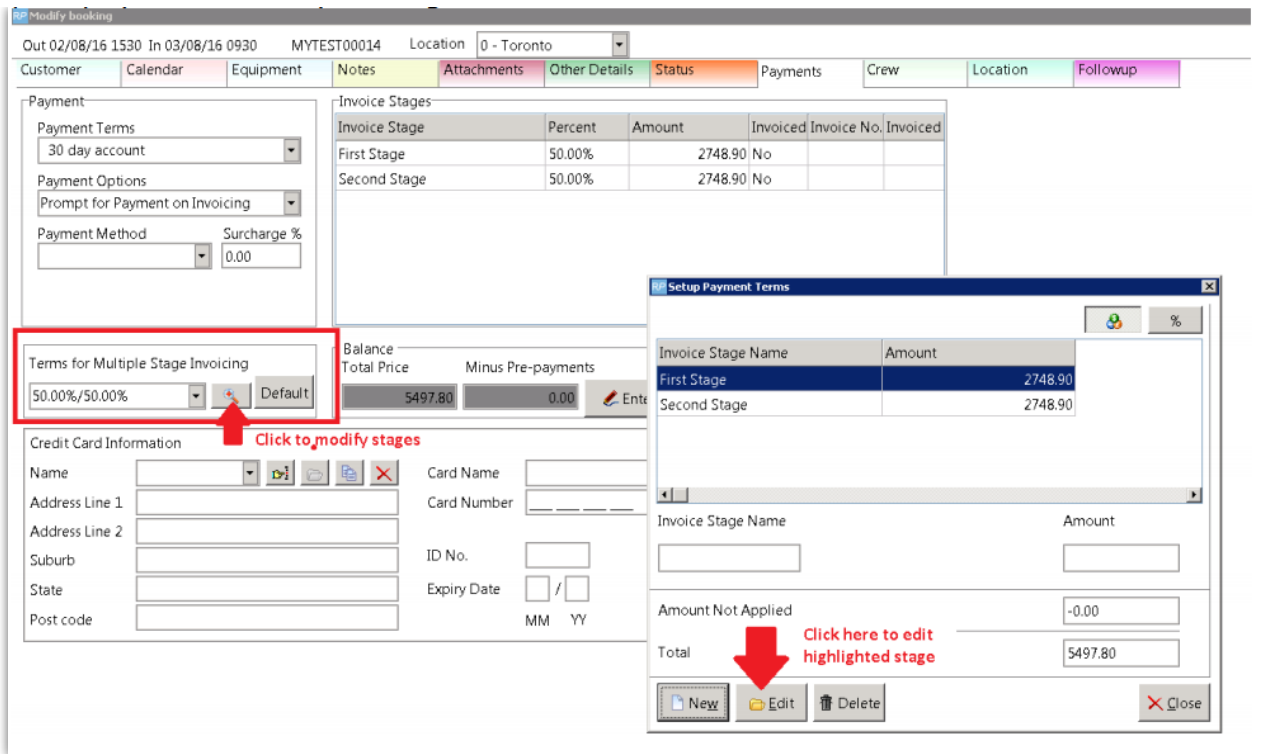
Customer Name (please print):

Customer Signature:

Date:

Modifying an Invoice Stage

- A stage may NOT be changed if the stage has an active invoice against it or if the invoice has been paid. To fix an error with a stage amount, the user must first REVERSE any payment against the invoice AND CREDIT out the invoice (see full details in the next section)
- To Modify an UNINVOICED stage, you may modify the stage from the booking payments tab.



When the Booking Amount changes BEFORE all stages are Invoiced

Should the booking amount change after some but not all stages have been invoiced, simply edit the remaining stages and distribute the outstanding amount over one or all of those stages.

For Example:

To invoice a booking with no taxes on the deposit stage of an invoice

Note: you'll need a modified template to show invoice stage figures and full tax amounts using either RTF insert fields or a modified Fast Report template. See 'Print/Re-Print' section below for more information.

First save the booking with no taxes applied:

Click on each tax amount to change the taxes applied

Actual Sub	0.00
Rental	
Sub total	2,736.00
Exempt	0.00
Exempt	0.00
Total Price	2,736.00

→

Set up payment terms in the booking and invoice the deposit stage

TRANHOT00002 Region 0 - EAST Location 0 - Main

nt Crew Venue Notes Payments Attachments Other Details

Invoice Stages

Invoice Stage	Percent	Amount	Invoiced	Invoice No.	Invoiced
Deposit	20.00%	547.20	Yes	34	547.20
Final	80.00%	2188.80	No		

Once invoiced, edit the booking and apply the taxes:

Tax Details

Tax Authority 1: HST
 Tax Authority 2: Exempt

Sale of Asset: 0.00
 Sales Tax Number if Exempt:

Show Taxes for:
 All
 Client Address (TN)
 Venue / Delivery address

OK Cancel

Actual Sub Rental	0.00	
Sub total	2,736.00	
Exempt	0.00	
Exempt	0.00	
Total Price	2,736.00	\$

The booking total will change, so you'll need to save the booking:

Actual Sub Rental	0.00	
Sub total	2,736.00	
HST	355.68	
Exempt	0.00	
Total Price	3,091.68	\$

Use the price last quoted, or not ?

Use the price last quoted 2736.00


Use the new total price @ 3091.68

OK

Cancel

You'll see a message regarding invoice stages - All stages have not been invoiced so nothing will be credited

Warning

 The new total price has been set. Some invoice stages have been invoiced and the crediting of invoices to arrive at the new total price will begin starting at the last invoice stage.

OK

RP Save

Then

Print

Booking Hardcopy

Custom print [using a template]

Invoice or delivery sheet

None of the above

then print

Technician show sheet

Expense report


Technician time sheet

Checkout Booking

Continue editing Printing with FastReport

OK

Cancel



Then click the payments tab and add the 'Amount not applied' to any outstanding stages

RP Setup Payment Terms

Invoice Stage Name	Amount
Deposit	547.20
Final	2188.80

< | >

Invoice Stage Name: Amount:

Amount Not Applied: ~~355.68~~

Total:

[What is this?](#)

RP Setup Payment Terms

Invoice Stage Name	Amount
Deposit	547.20
Final	2544.48

< | >

Invoice Stage Name: Amount:

Amount Not Applied:

Total:

[What is this?](#)

RP Setup Payment Terms

Invoice Stage Name	Amount
Deposit	547.20
Final	2544.48

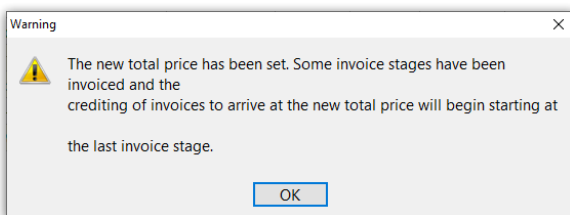
Amount Not Applied: 0.00

Total: 3091.68

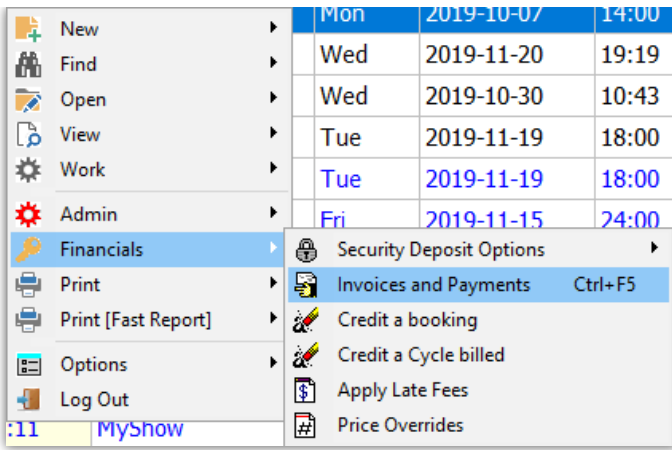
Buttons: New, Edit, Delete, What is this?, Close

When the Booking Amount changes AFTER all Stages are Invoiced

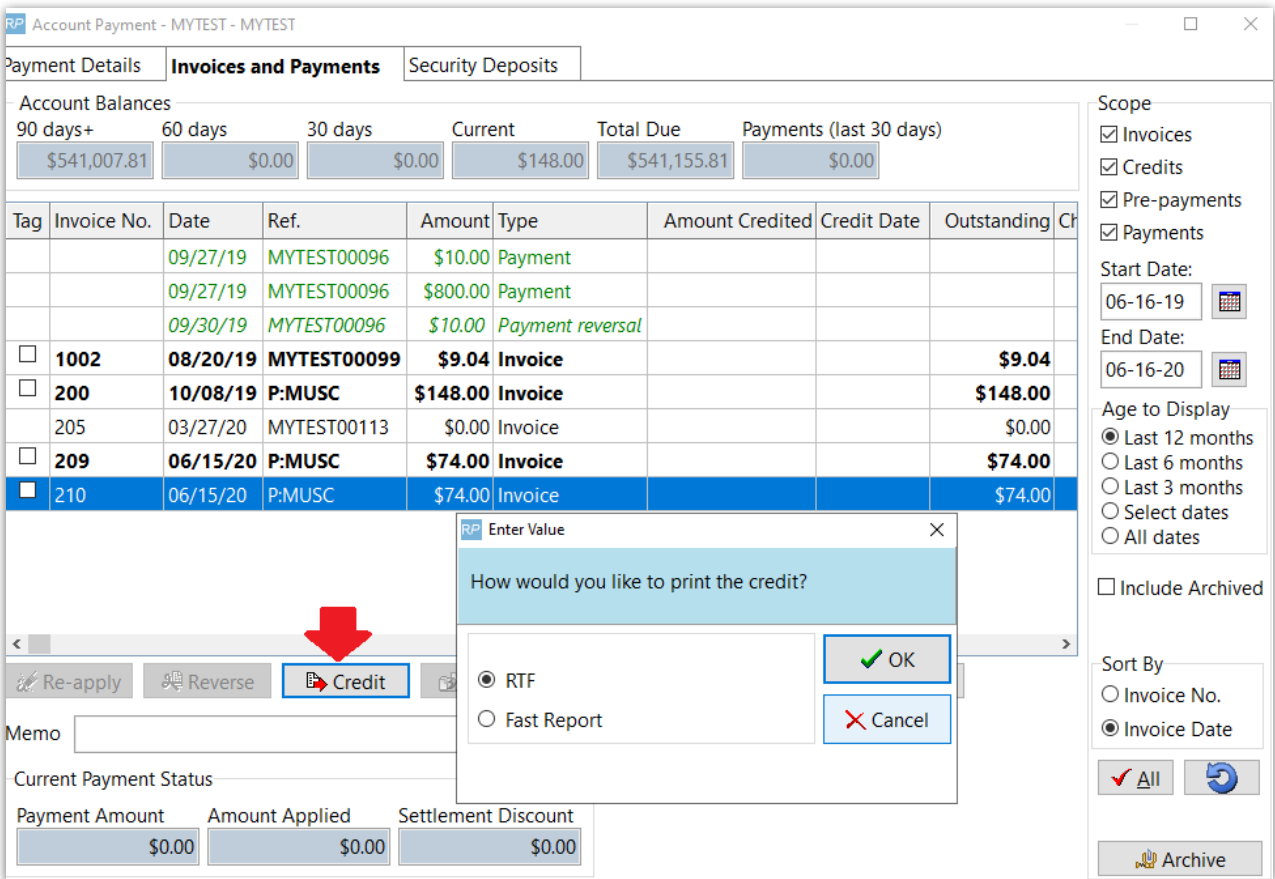
If all stages have been invoiced and the booking amount changes, the user will be notified on saving of the booking. This is a warning, no automatic action will be taken. The user must manually credit the last invoice stage in order to include the extra charges from the modified booking



Highlight the booking then goto financials-->Invoices and Payments



Highlight the invoice to credit



The payments tab of the booking will show the 'unapplied' amount. Use the



icon to modify the final stage.

RP Modify booking
 Out 10/04/19 0800 In 10/07/19 1400 MYTEST00105 Location 0 - Toronto

Customer Calendar Venue Equipment Crew Notes Payments Attachments Other Details

Payment
 Payment Terms: 30 day account
 Payment Options: Prompt for Payment on Invoicing
 Payment Method: Surcharge %: 0.00

Invoice Stages

Invoice Stage	Percent	Amount	Invoiced	Invoice No.	Invoiced
First	45.12%	74.00	Yes	209	74.00
Final	45.12%	74.00	Yes	210	74.00
Amount Not Applied *	9.76%	16.00	No		

Click to modify invoice stages

Terms for Multiple Stage Invoicing: 45.12%/45.12%/9.76%

Balance
 Total Price: 164.00 Minus Payments: 0.00 Balance: 164.00

When you attempt to invoice the booking, if the sum of the stage amounts do not equal the booking total, then Rentalpoint will automatically prompt you to correct your stages.

Information

16.00 has not been applied to any stages. Please apply it to a stage or create a new stage.

OK

RP Setup Payment Terms

Invoice Stage Name	Amount
First	74.00
Final	74.00

Amount Not Applied: 16.00

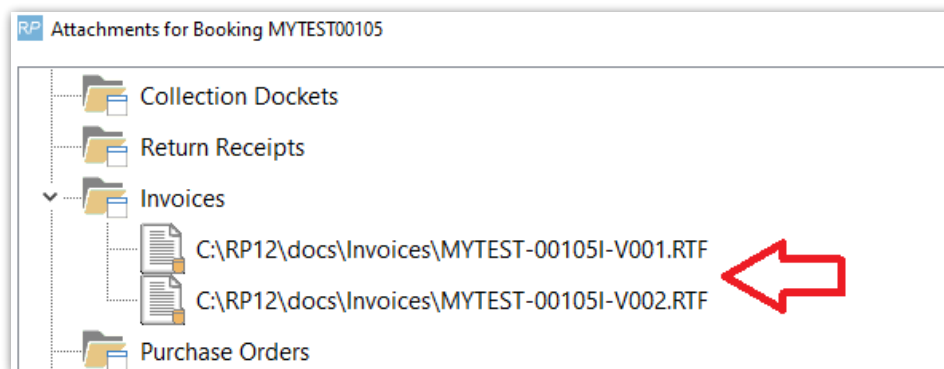
Total: 164.00

New Edit Delete What is this? Close

Printing/Re-Printing a Multi Stage Invoice

- In order to see the 'Stage Name and Amount' on the invoice you are printing, you will need to use specific templates:
 - RTF Templates: Custom template insert fields
 - The name of the stage - &stgNameC&
 - Stage Amount - &stgAmtDN&
 - Pre Tax Amt for Invoice Stage - &stgPreTN:8:2&
 - Tax 1 For Invoice Stage - &stgTax1N:8&
 - Tax 2 For invoice Stage - &stgTax2N:8&
 - Sum of previous stages - &StgSum:10:2&
 - Outstanding Balance - &BKOBALN&
 - Fast Report 'Stage Invoice' Templates should already pull the information needed
 - if you are unsure of how to do this please contact support@rentp.com for assistance
- There is no 're-print' option for stage invoices. However you can find each stage invoice on the attachments tab of the booking and could print from there.

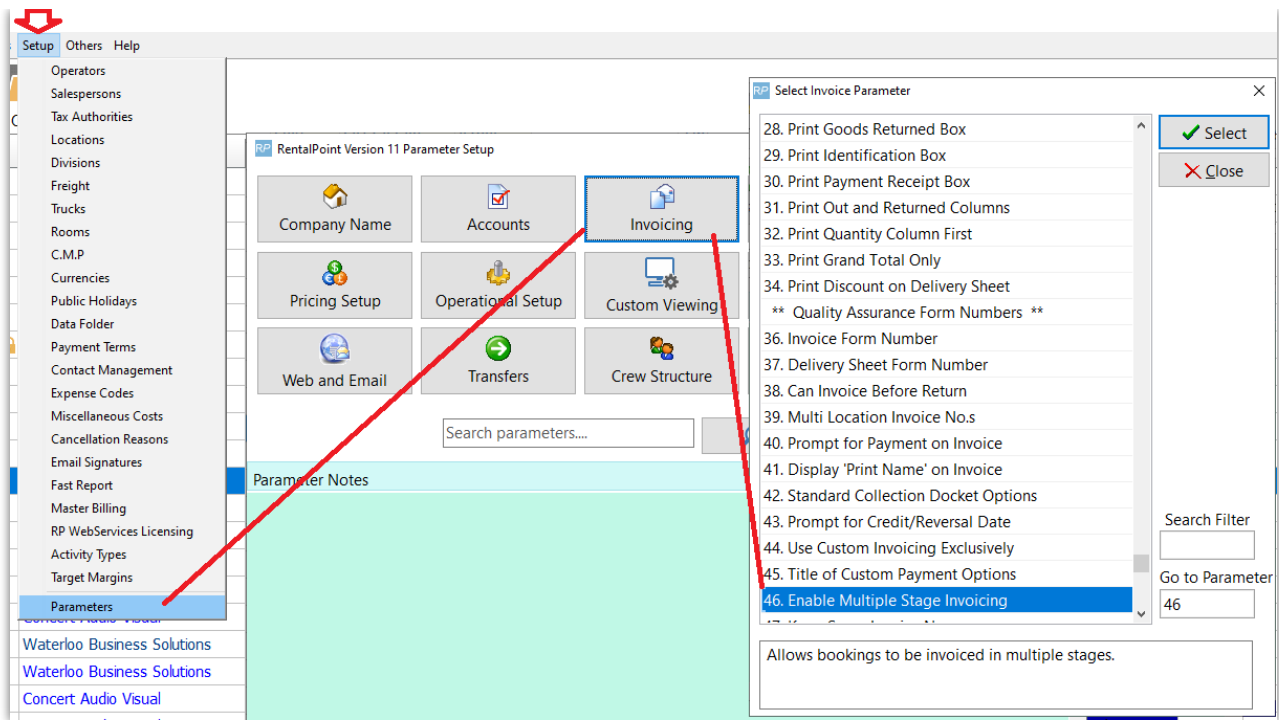
MYTEST00105	MYTEST	MU	New	9-10-04	08:00	Gibson Wedding
MYTEST00113	MYTEST		Find	9-10-08	19:20	test Show
WATBUS00004	Waterloo Business Solutions	MY	Open	9-10-22	09:00	Gibson Wedding
WATBUS00005	Waterloo Business Solutions	MY	View			Crew Planner
WATBUS00006	Waterloo Business Solutions		Work			View Attachments Ctrl+Alt+A
CONCRTAV00008	Concert Audio Visual	CO	Admin			Version Info



Multi-Stage Invoice Setup

Parameter Settings

Enable Invoicing Parameter #46 to allow multiple stage invoicing (these options are only visible in the booking when the parameter is enabled via Setup-->Parameters-->Invoicing-->46)



Enable Multiple Stage Invoicing

Default Customer Settings

- If this customer will have many bookings with the same invoice stages then set up the payment terms under the financial tab of the customer record. Once you have done this you can hit 'default' in the payment terms of the booking to load the default terms from the customer record without having to set them up each time.

-

Customer Maintenance

Address Financials Credit Card Others Notes

Credit Status

Credit Limit 10000.00

Account Type 30 day account

Allow/Stop Allow credit

Payment Method

Tax Details

Exempt No. 123456789

Rental Tax Exempt

Tax Authority #1 NYC Sales

Tax Authority #2 Exempt

NOTE: When invoicing a Project, taxes from the customer being invoiced will override any and all taxes entered on the bookings within the Project.

Payment Terms for Multiple Invoicing 50%/50%/

Account Manager

RP Setup Payment Terms

Invoice Stage Name	Percentage
Deposit	50.00
Final	50.00

Invoice Stage Name Percentage

Amount Not Applied 0.00 %

New Edit Delete What is this? Close

How to enter a Security Deposit

Security Deposit Documentation