Add Company Invoice Terms

The **Invoice Terms** identifies what is included on the invoice and how the invoice will be formatted. Use these instructions to create an Invoice Terms for a Company. The Billing team reviews the record and updates as needed, based on the agreement with the customer.

You complete only five fields. All other fields remain as defaulted.

- Name
- Payment Terms
- Billing Cycle
- Invoice Statement Template
- Summarize Invoice By

Instructions	Invoice Terms screen
Navigate to Company > Invoice Terms. To add a new Invoice Term, click Add Invoice Term	
Enter a Name Effective Date: Leave default Name:	Add Invoice Terms COMPANY Test Slocel Company EFFECTIVE DATE
Complete Payment Terms and Billing Cycle Payment Term: Defaults to Due on Receipt. Update to agreed terms or leave as default Billing Cycle: Weekly Discount Rate: Leave blank Surcharge Rate: Leave blank	PAYMENT TERMS ✓ Due Upon Receipt BILLING CYCLE • DISCOUNT RATE Q Options are presented if Discounts are available for this Company SURCHARGE RATE Q



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Leave all these fields a	s defaulted.	
Inv Approval Required:	No	REQUIRED Yes No
Wait for Timecards: No)	WAIT FOR TIMECARDS Yes No
Inv Only Approved Tim	ecards: Yes	
PO Required: No		INV ONLY APPROVED Yes No
Description: Blank		
Review Complete: No		PO REQUIRED Yes No
Status: Active		
		DESCRIPTION
		REVIEW COMPLETE No 💌
		status 🗸 Active 💌
Coloct Invesion Statement	at Tomplete	
Select Invoice Stateme	ent remplate	
Invoice Statement Ten	nnlate [.] Click in field	Invoice Format
and select the option		INVOICE STATEMENT C Q
		01_Motion Invoice Statement dock - Motion Invoice Statement
File Types for Invoicing	: Leave blank	INVOICING
Remit Instructions: Leave blank		REMIT INSTRUCTIONS
		Optional - Additional text for invoice
Complete Summarize I	nvoice Bv section	
		Split Invoice By
Add 4 new fields. Click in Add New Field.		
Select the listed entity from the first column		Add new field Q
and then the listed field in the second.		Group Invoice By
Repeat until all 4 are entered.		Add new field Q
F. ditte	F ield	Summarize Invoice By
Enuly	Field	Add new field Q
Billing Charge	Period End Date	
Billing Charge	Candidate	
Bill Transaction	Earn Code	Candidate > Candidate *
Bill Transaction Entry	Billing Rate	B in transition Details Details
		ver en transmition Enny Curreny Curre
(A completed Summar	ize Invoice By section	Add row field Q
is shown in the right column.)		
		Summarze invoice By
Clink Cours		ENTITY FIELD LABEL Billing Charge Period End Date
CIICK Save		Billing Charge Candidate
		Bill Transaction Entry Billing Rate
		Add new field Q



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