Create new invoice

Last updated: Wed, 22 Jan 2020 20:43:01 GMT

Discover how to create a new invoice in WorldShare Acquisitions.

Workflows and invoices for monographs

Workflows

The Acquisitions module allows a variety of receiving and invoicing workflows.

Once an item is ordered, users can do the following for each copy of the item:

- Receive and invoice
- Receive then invoice
- Invoice then receive

Invoicing and paying

Invoicing is adding an item to an invoice. Paying the invoice is a separate action (For information on paying, see Pay an invoice).

Once you have added an item to an invoice, you can move it to another invoice by deleting it from the original invoice and adding it to the new invoice.

Workflows and invoices for serials and e-products

Workflows

The Acquisitions module allows a variety of receiving and invoicing workflows. Items can be:

- Received and invoiced in one workflow
- Received then invoiced
- Received after they are invoiced

However, once you have added an item to an invoice, you can move it to another invoice by deleting it from the original invoice and adding it to the new invoice.

Three kinds of receiving

1. Use the receiving procedures on this screen to indicate you have started or finished receiving a serial on an order.
2. To edit your serials holdings use the Copies screen, see Create a local holding record.
3. To manage, receive, and claim issues from current subscriptions use the Issues screen, see Serial issues and Claim serial issues.

https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Invoice/Create_new_invoice
Printed: Sat, 11 Apr 2020 03:40:42 GMT
Invoicing and paying

Invoicing is adding an item to an invoice. Paying the invoice is a separate action (For information on paying, see Pay an invoice).

Create invoice

1. On the left navigation, click Invoices > Invoices.
2. On the Invoices screen, click New Invoice.
3. In the Add New Invoice dialog, complete the fields - Table

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoice Number (required)</td>
<td>The number for the invoice. Invoice numbers can contain letters.</td>
</tr>
<tr>
<td>Vendor (required)</td>
<td>This field automatically suggests vendors from those listed as in use in Vendors.</td>
</tr>
<tr>
<td>Invoice Date (required)</td>
<td>Today's date is the default value for Invoice Date. Click the calendar icon to change it.</td>
</tr>
</tbody>
</table>

Tax Handling

<table>
<thead>
<tr>
<th>TAX CALCULATION METHOD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tax item cost</td>
<td>Calculates tax amount by multiplying tax percentage by the price</td>
</tr>
<tr>
<td>Tax item, service charge, and shipping cost</td>
<td>Calculates tax amount by multiplying tax percentage by the price, service charges, and shipping</td>
</tr>
<tr>
<td>Includes taxes in costs</td>
<td>Calculates tax amount by considering it as included in the price, service charges, and shipping</td>
</tr>
</tbody>
</table>
4. Click **Save**.