Add items directly to an invoice (without ordering first)

Last updated: Mon, 22 Apr 2019 13:46:54 GMT

Discover how to find and add items directly to an invoice without ordering first in WorldShare Acquisitions. You can add items directly to an invoice without first ordering them. This can be used for things like Postage or Shipping fees or any item that does not require an order. Invoice items created by this process are still linked to a local resource but not an order item.

Find an invoice

1. Navigate to Invoices > Invoices.
2. Click Search to view all invoices. 
   Or
   Enter an Invoice Number for the specific invoice you want to find.
3. On the Invoices screen you can also filter invoices by Payment Status or Vendor.
   ◦ View by Vendor: Use the Vendor filter (under the search box) to search for invoices from a specific vendor, multiple vendors, or all vendors.
   ◦ View by Payment Status: Use the Payment Status filter (under the search box) to see Open, Paid, Ready, or All invoices.

Note: See also, Search and filter invoice items and Search and filter invoices.

Add item directly to an invoice

1. Open the invoice by clicking on the invoice number link in the search results. See above for finding a specific invoice.
2. From the Add Item drop-down menu, select the item to add.
   a. Debit - A debited item increases the amount paid from fund upon payment of invoice
   b. Credit - A credited item decreases the amount paid from fund upon payment of invoice
   c. Refund - A refunded item decreases the amount paid from fund upon payment of invoice
   d. Favorite - A favorite item is a user-created local resource. For more information, see Manage favorite local resources.
3. In the Add Local Resource to Invoice dialog, you can add an item for a new or existing local resource quickly and easily.
   a. Existing local resource
      1. From the Add or Search Item dialog, enter your search term(s) in the Local Resource form field. As you type, the system automatically suggests names of potential matches.
      2. If the local resource you wish to select is the first one in the list, press <Enter>. The local resource is
created and added to the invoice.

3. If the local resource you wish to select is further down on the list, use the arrow keys or mouse to select the local resource.
   Note:
   • You can also continue typing your term(s) to move this local resource to the top spot.
   • An inactive local resource will display in a search only if no other local resources match your query. If selected, its status will change to Active.

b. New local resource
   1. From the Add or Search Item dialog, enter your search term(s) in the Local Resource form field. As you type, the system automatically suggests names of potential matches.
   2. If a resource matching your search term(s) does not exist, it will appear as a new (e.g., Whiteboard Cleaner (new)) in the search results.
   3. Press <Enter> or select this result to create a new local resource.