Create an Invoice

This guide will walk you through the steps needed to create an invoice in the portal.

Invoices are created by the supplier and are sent to the retailer. They include **invoice items** along with **invoice totals**. In the portal, invoices can be created for multiple orders or individual orders. See the link below for an overview of invoices, settings, document fields and more.

Invoices

Invoice multiple orders

You can create an **invoice** for multiple orders at a time using **Bulk Actions** or our **Advanced Import** tool. See the links below for more information on how to invoice multiple orders:
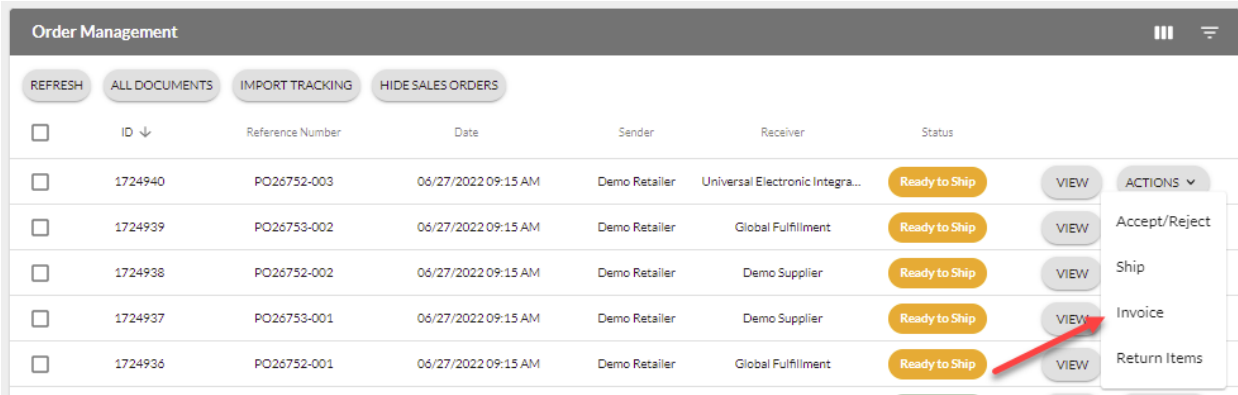
Bulk Actions

Advanced Import

Invoice individual orders

You can create **invoices** for shipped items on individual orders in the portal. See the instructions below on how to create an invoice document.

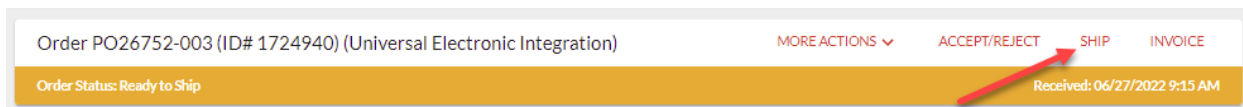# 1. Create an Invoice draft document

Option 1

1. Locate the **order** you want to invoice > click on **More Actions** > **Invoice**

Option 2

1. Locate the **order** you want to invoice > click on **View** > **Invoice**

Option 3

1. Locate the **shipment** you want to invoice > click on **View** > **Invoice**

Shipment 501171435 (ID# 1748661) (Demo Walmart)   MORE ACTIONS ∨   VIEW PACKING SLIP   NEW INVOICE

Shipment Status: Complete   Received: 07/14/2022 3:26 PM
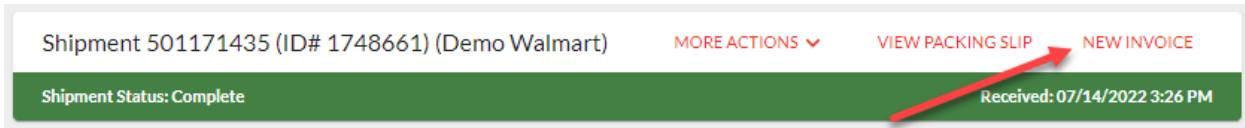
2. Fill out the document

See instructions below on how to fill out the different sections of the invoice. **Required** steps are marked with an **asterisk**. See **retailer-specific documentation** or **Document Standards** for additional required fields.

Document Standards

Remittance Address

The **Remittance Address** section will indicate the specific postal address you want to use to receive payments or receive invoices by mail.

1. Enter in a **Remittance Address** manually or select one from the **Address Book** *Country Codes must be 2 characters long*

Default Remittance Address and Address Book

TIP

Configure a **Default Remittance Address** so you don't have to specify one on every invoice you create or use the **Address Book** if you need to easily select from multiple addresses. See Document Settings > **Remittance Addresses** and Documents > **Address Book**.

Invoice Items

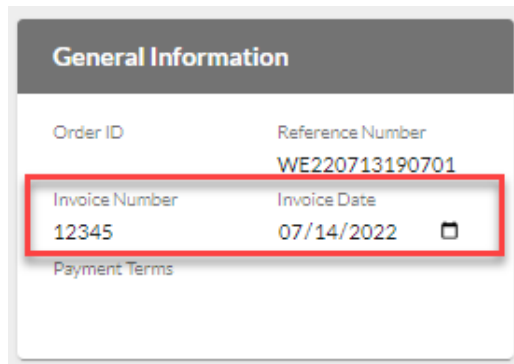The **Invoice Items** section will indicate what order items are being invoiced.

- Invoicing off the **order** will populate all ordered items
- Invoicing off the **shipment** will populate all shipped items

1. Confirm this section reflects the correct **Quantity Invoiced** and **Unit Price** of the items you want to invoice

*General Information

The **General Information** section will indicate invoice dates and other invoice-specific details.

1. Enter in an **Invoice Number**
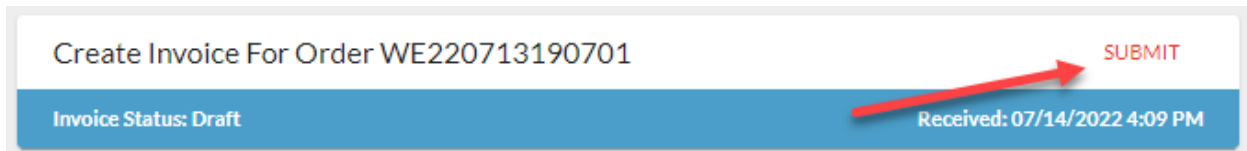2. Logicbroker will default the **Invoice Date** as **today** but you can change it if you wish

3. Submit

1. Click on **Submit** in the top right

Need more information?

Visit our **Knowledge Base** or log into **Learn Logicbroker** for more details on how to optimize your Logicbroker experience.

Helpful Links

Invoices

Bulk Actions

Advanced Import

Document Standards

Order Management FAQs

Support
Reach out to support@logicbroker.com