



# Split Invoices User Guide

Microsoft Power Platform

Microsoft  
Partner



Gold Cloud Customer Relationship Management  
Gold Cloud Business Applications  
Gold ISV

2019/2020 INNERCIRCLE  
*for Microsoft Business Applications*

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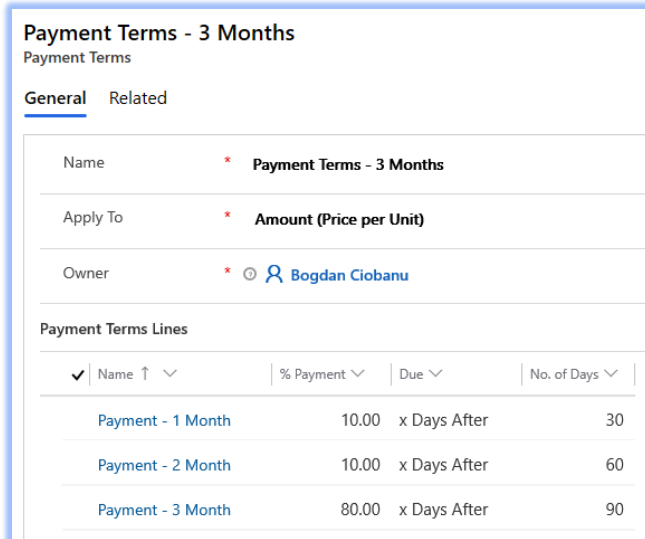
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# 1 Introduction

## 1.1 Solution Overview

**Split Invoices** solution allows users to split the order payments into multiple invoices. The solution offers a highly configurable way to define payment terms, which can then be applied to order records in Dynamics 365.

As an **example**, defining the Payment Terms for 3 months, the amount being split as 10% - first month, 10% - second month and final payment of 80% - third month.



**Payment Terms - 3 Months**  
Payment Terms

**General** Related

Name \* **Payment Terms - 3 Months**

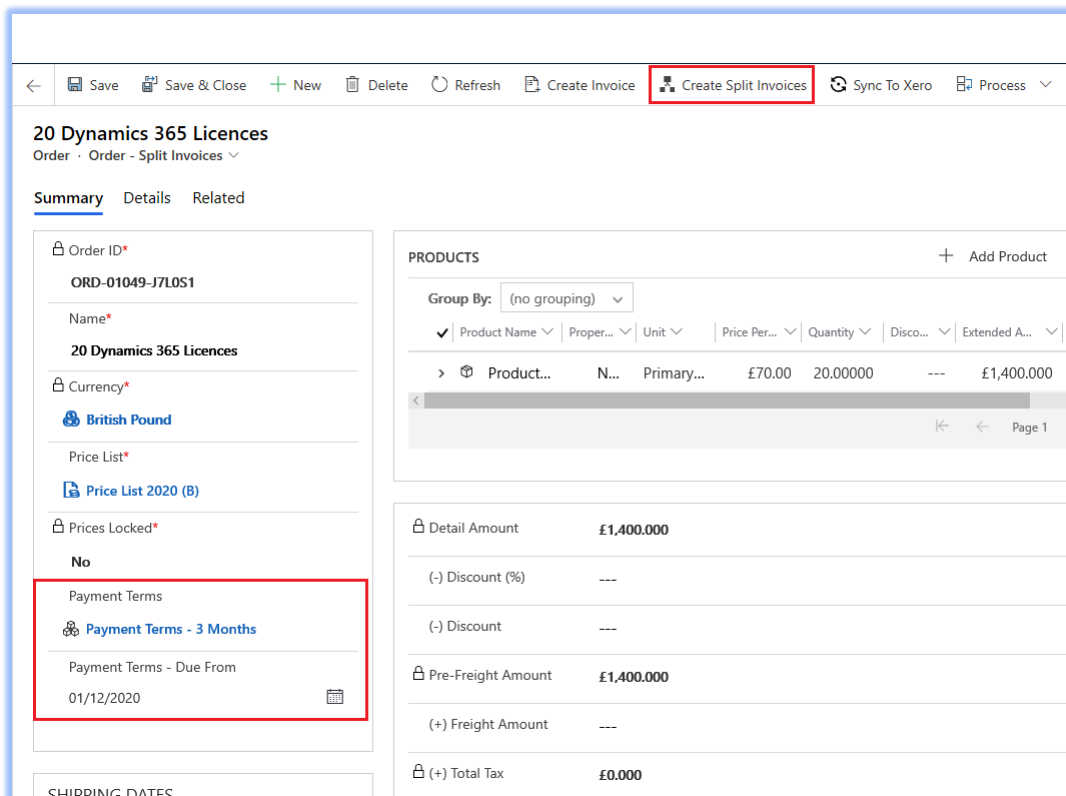
Apply To \* **Amount (Price per Unit)**

Owner \* **Bogdan Ciobanu**

**Payment Terms Lines**

✓ Name ↑ ↓	% Payment ↓	Due ↓	No. of Days ↓
Payment - 1 Month	10.00	x Days After	30
Payment - 2 Month	10.00	x Days After	60
Payment - 3 Month	80.00	x Days After	90

The order is created in Dynamics 365 and the Payment Terms and the payment starting date are specified.



← Save Save & Close + New Delete Refresh Create Invoice **Create Split Invoices** Sync To Xero Process ▾

**20 Dynamics 365 Licences**  
Order · Order - Split Invoices ▾

**Summary** Details Related

Order ID\*  
**ORD-01049-J7L0S1**

Name\*  
**20 Dynamics 365 Licences**

Currency\*  
 **British Pound**

Price List\*  
 **Price List 2020 (B)**

Prices Locked\*  
**No**

Payment Terms  
 **Payment Terms - 3 Months**

Payment Terms - Due From  
01/12/2020

**PRODUCTS** + Add Product

Group By: (no grouping) ▾

✓ Product Name ▾	Proper... ▾	Unit ▾	Price Per... ▾	Quantity ▾	Disco... ▾	Extended A... ▾
>  Product...	N...	Primary...	£70.00	20.00000	---	£1,400.000

< < Page 1

Detail Amount **£1,400.000**

(-) Discount (%) ---

(-) Discount ---

Pre-Freight Amount **£1,400.000**

(+) Freight Amount ---

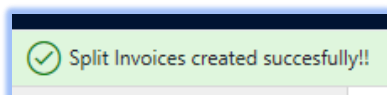
Total Tax **£0.000**

**SHIPPING DATES**

In this example, once we click **Create Split Invoices** button, we would get three separate invoices as follows:

Invoice ID	Name ↑	Total Amount...	Due Date
INV-01316-B1Q1S9	20 Dynamics 365 Licences	£140.000	31/12/2020
INV-01317-P0R0D7	20 Dynamics 365 Licences	£140.000	30/01/2021
INV-01318-G5K0P0	20 Dynamics 365 Licences	£1,120.000	01/03/2021

A **notification** is displayed to the user, to highlight the invoices were created:



## 2 Payment Terms and Payment Terms Lines Setup

To use the Payment Terms on order records, they have to be defined in the system. A few options are available as defined in this section.

### 2.1 Payment Terms Setup

- Payment Terms that apply to order **total amount**. In this scenario the invoices will be created, and the total amount will be split as defined by the payment term lines.

Payment Terms - 2 x 50% Payments

Payment Terms

General

Related


Name

\* Payment Terms - 2 x 50% Payments

Apply To

\* Amount (Price per Unit)

Owner

\*  Bogdan Ciobanu

Payment Terms Lines

✓ Name ↑	% Payment	Due	No. of Days
Payment 1	50.00	x Days After	30
Payment 2	50.00	x Days After	60

- Payment Terms that apply to the **quantity**. In this scenario the invoices will be created, and the invoices quantity will be split as defined by the payment terms lines. Total amount for the invoice will be calculated accordingly.

Payment Terms - 50% Quantity

Payment Terms

General

Related


Name

\* Payment Terms - 50% Quantity

Apply To

\* Quantity

Owner

\*  Bogdan Ciobanu

Payment Terms Lines

✓ Name ↑	% Payment	Due	No. of Days
Payment 1	50.00	x Days After	30
Payment 2	50.00	x Days After	60

## 2.2 Payment Terms Lines Setup

Each Payment Term could have one or multiple Payment Terms Lines, that will define the number of payments and ultimately the number of invoices being generated, specifying the percentage of either order total amount or order quantity that needs to be split, as well as the due date.

A few options are allowed for each payment, as follows:


- Payment Terms Lines that are due **up front/immediately**. In this case, the invoice due date would be set to the same value as the order Payment Terms – Due From date. If the order Payment Terms – Due From date was not set on the order, the invoice due date would default to the current date (invoice created date).

Payment 1

Payment Terms Line

General

Related

Payment Terms	*	 <a href="#">Payment Terms - 50% Quantity</a>
% Payment	*	50.00
Due	*	Up Front/Immediate
Name		Payment 1


- Payment Terms Lines that are due **x days before** the order Payment Terms – Due From date. In this case, in the example below, the invoice due date would be set 30 days **before** the order Payment Terms – Due From date.

Payment 1

Payment Terms Line

General

Related

Payment Terms	*	 <a href="#">Payment Terms - 50% Quantity</a>
% Payment	*	50.00
Due	*	x Days Before
No. of Days	*	30
Name		Payment 1


- Payment Terms Lines that are due **x days after** the order Payment Terms – Due From date. In this case, in the example below, the invoice due date would be set 30 days **after** the order Payment Terms – Due From date.

Payment 1

Payment Terms Line

General

Related


Payment Terms	*	 <a href="#">Payment Terms - 50% Quantity</a>
% Payment	*	50.00
Due	*	x Days After
No. of Days	*	30

- Payment Terms Lines that could be setup to be **manual**, so the invoice due date would be left blank and the user will populate it manually.

**Payment 1**  
Payment Terms Line

General

Related

Payment Terms	*	 <a href="#">Payment Terms - 50% Quantity</a>
% Payment	*	50.00
Due	*	Manual
Name		Payment 1