PREACT

Split Invoices User Guide

Microsoft Power Platform

Microsoft Partner

Microsoft

Gold Cloud Customer Relationship Management
Gold Cloud Business Applications
Gold ISV

2019/2020 INNERCIRCLE
for Microsoft Business Applications

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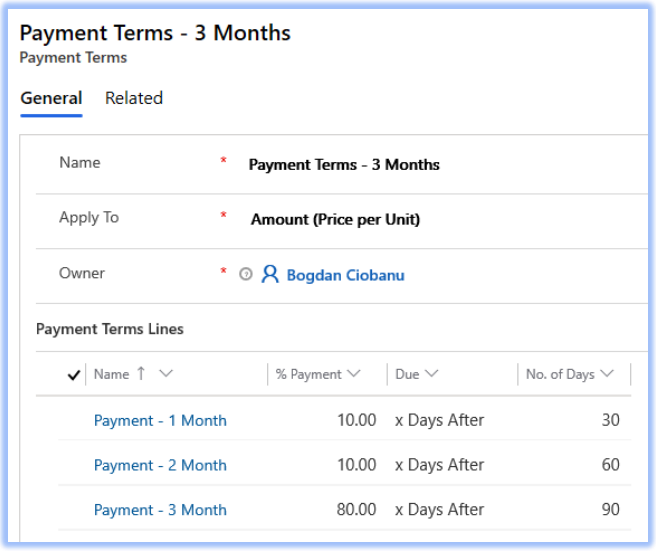
1 Introduction

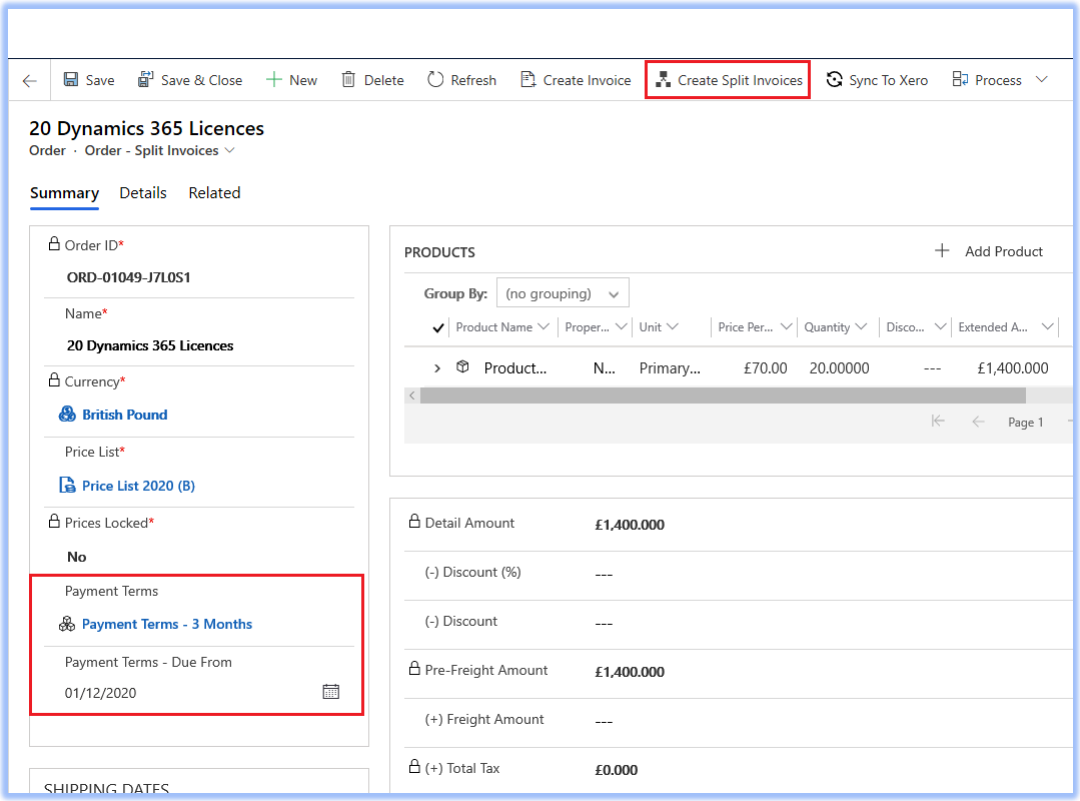
1.1 Solution Overview

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.



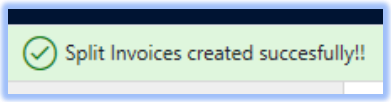
The order is created in Dynamics 365 and the Payment Terms and the payment starting date are specified.



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:

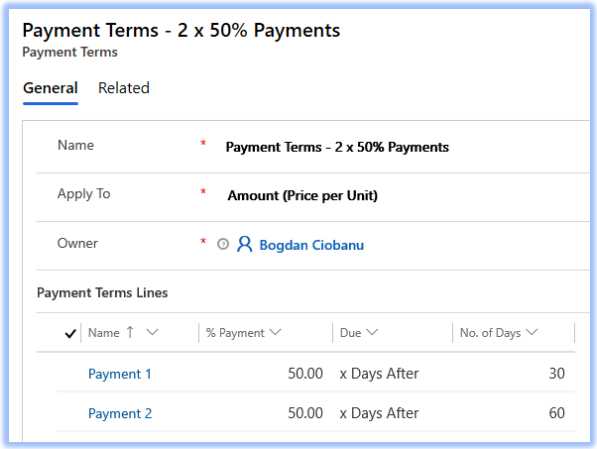


2 Payment Terms and Payment Terms Lines Setup

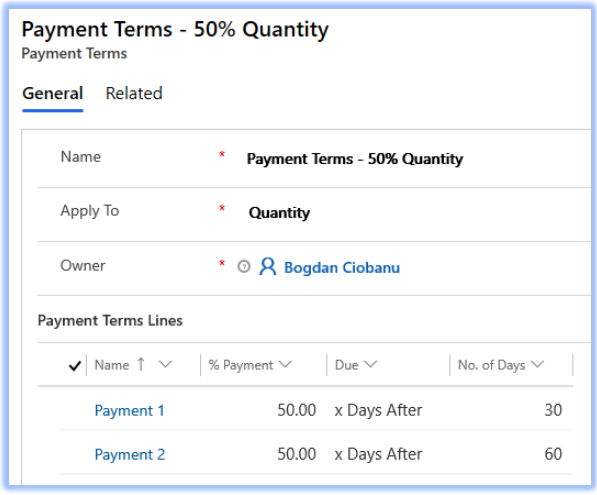
To use the Payment Terms on order records, they have to be defined in the system. A few options are available as defined in this section.

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 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.

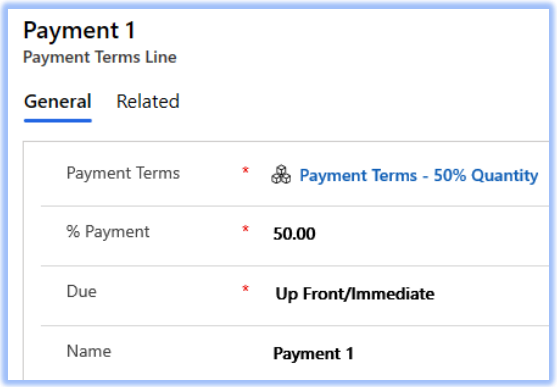


2.2 Payment Terms Lines Setup

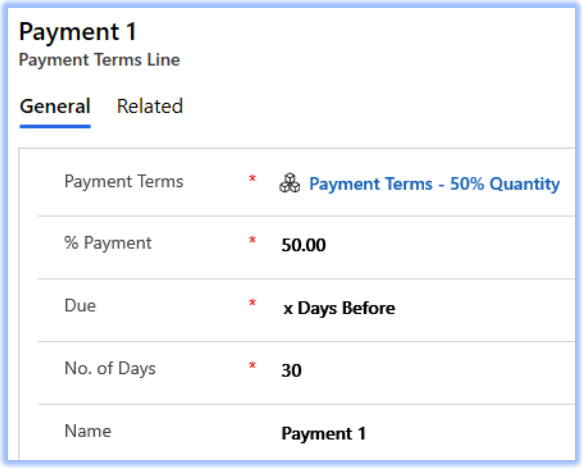
Each Payment Term could have one or multiple Payment Terms Lines, that will define the number of payments and ultimately the number of invoices being generated, specifying the percentage of either order total amount or order quantity that needs to be split, as well as the due date.

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

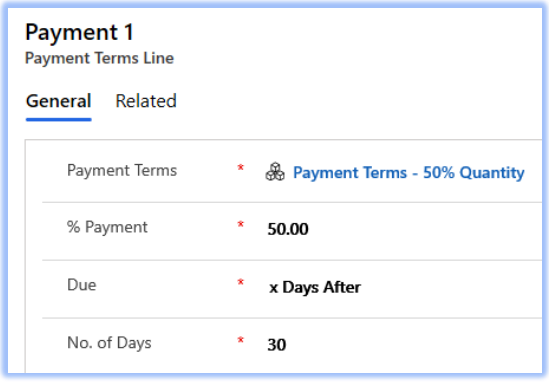
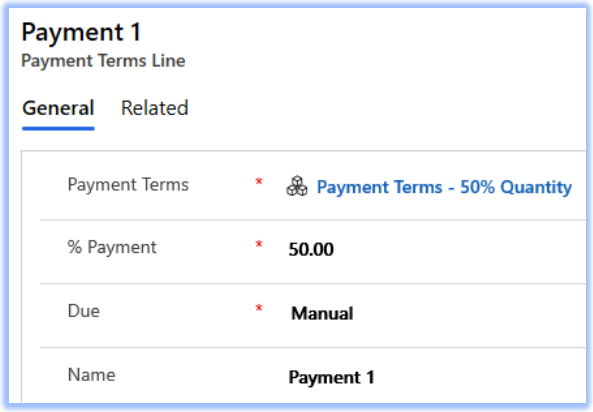
- Payment Terms Lines that are due **up front/immediately**. In this case, the invoice due date would be set to the same value as the order Payment Terms – Due From date. If the order Payment Terms – Due From date was not set on the order, the invoice due date would default to the current date (invoice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



- Payment 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 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 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.