

Manually Create an Invoice

1

In Stride you can create manual invoices for customers. These invoices will be separate from repair orders or sales orders and will not affect product inventory levels. However, if you add a product to the invoice it will affect your interim inventory account (if you are using Stride Accounting). Service based products will not affect the interim inventory account.

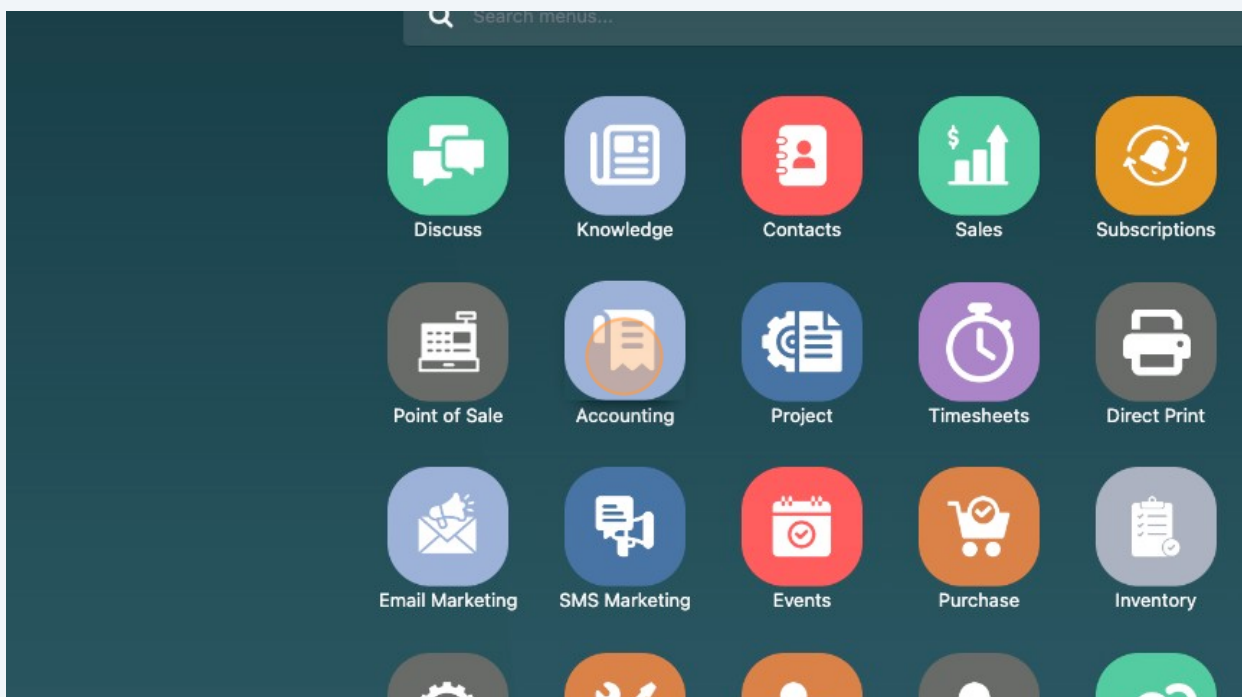
Invoices are a method for recording payments from a customer.

Note*: Invoices do not have to have a product attached. You can simply enter a label and price and create an invoice not tied to a product or service.

2

In this example, we will go to the Accounting Module.

Note* You can create invoices by going to the contacts module, selecting the contact, navigating to the "Invoices" section on their contact card and creating a new invoice. This will prefill the customer information.



3 Click "NEW INVOICE"

The screenshot shows the Accounting Dashboard interface. At the top, there is a navigation bar with the logo 'strideretail', 'Accounting', 'Dashboard', and a plus sign. On the right, there are icons for a printer, a message with '5', a refresh with '7', and a play button, along with a timer '00:00:00' and the text 'Hidden Treasures Q'. Below the navigation bar is a search bar with 'Favorites x' and 'Search...'. There are also 'Filters', 'Group By', and 'Favorites' options. The main content area is divided into four sections: 'Customer Invoices', 'Vendor Bills', 'Miscellaneous Operations', and 'Bank'. In the 'Customer Invoices' section, a 'NEW INVOICE' button is highlighted with an orange circle. A tooltip is visible over the button, containing the text: 'Button (no string)', 'Object: account.journal', 'Button Type: object', and 'Method: action_create_new'. To the right of the button, it says '3 Unpaid Invoices \$ 49.53' and '3 Late Invoices \$ 49.53'. Below this is a bar chart with categories 'This Week', '4 - 10 Aug', '11 - 17 Aug', and 'Not Due'. The 'Vendor Bills' section has an 'UPLOAD' button and 'Create Manually' text, with a bar chart showing a bar for '21 - 27 Jul'. The 'Miscellaneous Operations' section has a 'NEW ENTRY' button. The 'Bank' section has an 'Import Statement' button.

4 Click the "Customer?" field and search for your customer.

The screenshot shows the 'New Customer Invoice' form. At the top, there is a navigation bar with the logo 'strideretail', 'Accounting', 'Dashboard', and a plus sign. On the right, there are icons for a printer, a message with '5', a refresh with '7', and a play button, along with a timer '00:00:00' and the text 'Hidden Treasures Q'. Below the navigation bar is a search bar with 'Favorites x' and 'Search...'. There are also 'Filters', 'Group By', and 'Favorites' options. The main content area is divided into four sections: 'Customer Invoices', 'Vendor Bills', 'Miscellaneous Operations', and 'Bank'. In the 'Customer Invoices' section, a 'NEW INVOICE' button is highlighted with an orange circle. A tooltip is visible over the button, containing the text: 'Button (no string)', 'Object: account.journal', 'Button Type: object', and 'Method: action_create_new'. To the right of the button, it says '3 Unpaid Invoices \$ 49.53' and '3 Late Invoices \$ 49.53'. Below this is a bar chart with categories 'This Week', '4 - 10 Aug', '11 - 17 Aug', and 'Not Due'. The 'Vendor Bills' section has an 'UPLOAD' button and 'Create Manually' text, with a bar chart showing a bar for '21 - 27 Jul'. The 'Miscellaneous Operations' section has a 'NEW ENTRY' button. The 'Bank' section has an 'Import Statement' button.

The form is titled 'Customer Invoice Draft'. It has a 'CONFIRM' button and a 'PREVIEW' button. The form fields include: 'Customer?' (highlighted with an orange circle), 'Delivery Address?', 'Invoice Date?', 'Payment Reference?', 'Due Date?' (07/29/2024), and 'Journal?' (Customer Inv). Below the form is a table with columns: 'Product', 'Label', 'Account', 'Analytic', 'Quantity', 'UoM', and 'Price'. There are also buttons for 'Add a line', 'Add a section', and 'Add a note'.

5

This creates a draft invoice.

Now you can add products/services to this invoice.

Note*: Invoices do not have to have a product attached. You can simply enter a label and price and create an invoice not tied to a product or service.

CONFIRM PREVIEW CANCEL DRAFT POSTED

Customer Invoice

Draft

Customer ? Mike Leon
2510 Allison Expressway
East Cherylport MT 90771
United States

Invoice Date ?

Payment Reference ?

Due Date ? 07/29/2024 or Terms

Delivery Address ? Mike Leon

Journal ? Customer Invoices in USD


Invoice Lines Journal Items Other Info

| Product | Label | Account | Analytic | Quantity | UoM | Price | Disc.% | Taxes | Subtotal |
|------------|---------------|------------|----------|----------|-----|-------|--------|-------|----------|
| Add a line | Add a section | Add a note | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

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Send message Log note Activities 🔗 1 Following

Today

 Administrator - now
Invoice Created

6

The label field will automatically populate if you select a product/service. If you don't want to create an invoice for a product/service you can add a label here. This will create an invoice that is just for recording payments.

| | | | |
|-------------------------------|---|--------------------------------|--------------|
| Customer ^f | Mike Leon 2510 Allison Expressway East Cherylport MT 90771 United States | Invoice Date ^f | |
| | | Payment Reference [?] | |
| Delivery Address [?] | Mike Leon | Due Date [?] | 07/29/2024 |
| | | Journal [?] | Customer Inv |

| Invoice Lines | Journal Items | Other Info | | | | |
|---------------|---------------|---------------|----------|----------|-----|-------|
| Product | Label | Account | Analytic | Quantity | UoM | Price |
| | | 400000 Produc | | 1.00 | | 0.00 |
| Add a line | Add a section | Add a note | | | | |

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If a product or service is selected the account will automatically be selected based on that product/service.

You can manually change the account for the invoice.

| | | | |
|-------------------------------|---|--------------------------------|--------------|
| Customer ^f | Mike Leon 2510 Allison Expressway East Cherylport MT 90771 United States | Invoice Date ^f | |
| | | Payment Reference [?] | |
| Delivery Address [?] | Mike Leon | Due Date [?] | 07/29/2024 |
| | | Journal [?] | Customer Inv |

| Invoice Lines | Journal Items | Other Info | | | | |
|---------------|---------------|-----------------|----------------------|----------|-----|-------|
| Product | Label | Account | Analytic | Quantity | UoM | Price |
| | | 400000 Produc → | | 1.00 | | 0.00 |
| Add a line | Add a section | Add a | 400000 Product Sales | | | |

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Click here to set the price. You can also add a discount and change the taxes if necessary.

Note*: You can change the view of what columns are showing by clicking this toggle button and selecting the columns you want to see.

way
0771

Payment Reference ?

Due Date ? 07/29/2024 or Terms

Journal ? Customer Invoices in USD

Info

| Amount | Analytic | Quantity | UoM | Price | Disc.% | Taxes | Subtotal |
|--------|----------|----------|-----|-------|--------|-----------|----------|
| 000 | Produc | 1.00 | | 0.00 | 0.00 | Default x | \$ 0.00 |

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Untaxed Amount: \$ 0.00
Sales Tax: \$ 0.00
Total: \$ 0.00

9

Click here to save. If the invoice is ready to send to the customer you can click "Confirm"

Once confirmed the invoice can be sent to your customer via email and they can pay for it online (if online payment is enabled), you can settle it at the point of sale, you can take a check payment for the invoice, or you can take an over the phone payment by clicking the Action>Stride Payment option.

strideretail Accounting Dashboard + 🔍 🖨️ 📧 5 🔄 7 ▶️ 00:00:00 Hidden Treasures Quilt and Sew A

Accounting Dashboard / Draft Invoice (* 339) 🔒 🔄 🖨️ Print 📄 Download ⚙️ Act

CONFIRM PREVIEW CANCEL Save manually

Customer Invoice

Draft

Customer ? Mike Leon
2510 Allison Expressway
East Cherylport MT 90771
United States

Invoice Date ?

Payment Reference ?

Delivery Address ? Mike Leon

Due Date ? 07/29/2024 or

Journal ? Customer Invoices in

Invoice Lines Journal Items Other Info

| Product | Label | Account | Analytic | Quantity | UoM | Price | Disc.% | Taxes |
|---------|-------|---------------|----------|----------|-----|-------|--------|---------|
| | | 400000 Produc | | 1.00 | | 0.00 | 0.00 | Default |

Add a line Add a section Add a note