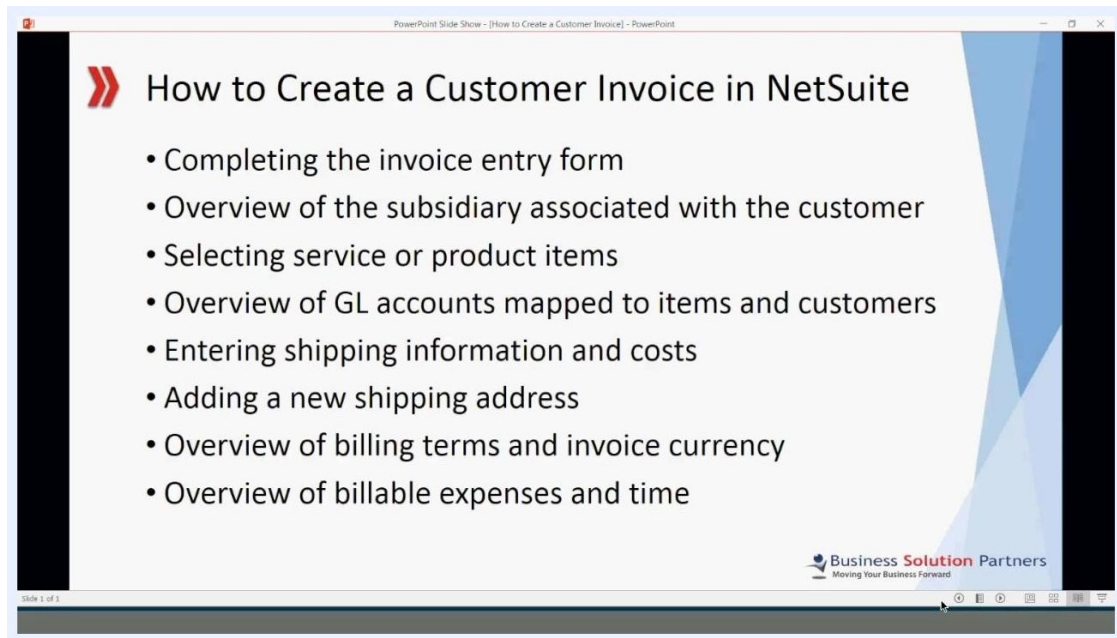


How to Create an Invoice in NetSuite

This guide walks you through how to create an invoice in NetSuite, from opening the invoice entry form to saving the completed transaction. You'll learn how to complete the invoice header, select the correct subsidiary, choose service or product items, understand how items map to GL accounts, enter shipping and billing information, add a shipping address, review billing terms and currency, and account for billable expenses and time.



PowerPoint slide listing the training topics: Completing the invoice entry form, Overview of the subsidiary associated with the customer, Selecting service or product items, Overview of GL accounts mapped to items and customers, Entering shipping information and costs, Adding a new shipping address, Overview of billing terms and invoice currency, Overview of billable expenses and time. Business Solution Partners logo at the bottom right.

Before you begin

Before creating an invoice, confirm the following:

- You have access to either the Customers or Billing menu in NetSuite.
- The customer record already exists and is linked to the correct subsidiary, since every invoice for a customer posts to that customer's assigned subsidiary.
- The items you plan to bill have already been set up with a list price and a tax code, since these settings determine how each item is priced and taxed on the invoice.

- If your company uses the Advanced Billing module, you know the billing start and end dates for the transaction.
- You are aware that you can only post to open accounting periods.

Primary Information

CUSTOM FORM *
Standard Product Invoice

INVOICE #
3003902

CUSTOMER *
ADM Industries

PROJECT

DATE *
7/7/2017

START DATE

END DATE

POSTING PERIOD *
Jul 2017

DUE DATE
8/8/2017

PO #

MEMO

Sales Information

OPPORTUNITY

SALES EFFECTIVE DATE

EXCLUDE COMMISSIONS

LEAD SOURCE

PARTNER
AL Systems Ltd

Classification

SUBSIDIARY
US 2

CLASS

LOCATION *

Summary	
SUBTOTAL	0.00
DISCOUNT ITEM	0.00
TAX TOTAL	0.00
SHIPPING COST	0.00
HANDLING COST	0.00
GIFT CERTIFICATE	0.00
TOTAL	0.00

Cursor positioned in the empty PO # field, with the empty Memo field directly below it.

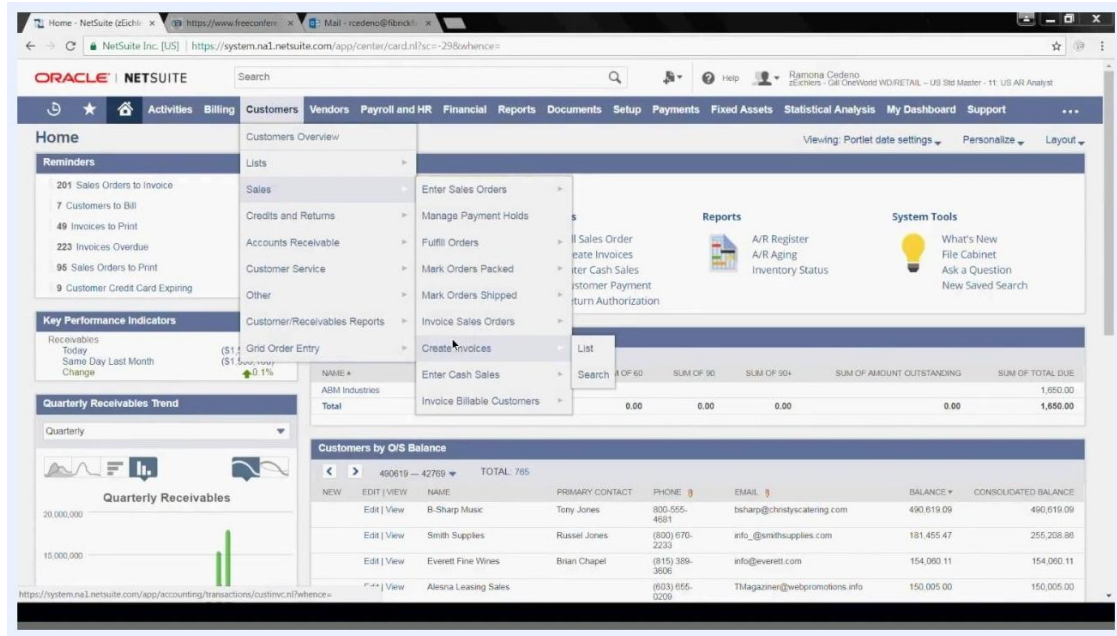
Step 1: Open the invoice entry form

Navigate to the invoice entry form using one of the following paths:

- Customers > Sales > Create Invoices
- Billing > Sales > Create Invoices

Step 2: Select the invoice form type

On the invoice entry form, click the Form dropdown and select Standard Product Invoice. Your firm may have custom forms configured, so choose the one that matches your requirements.



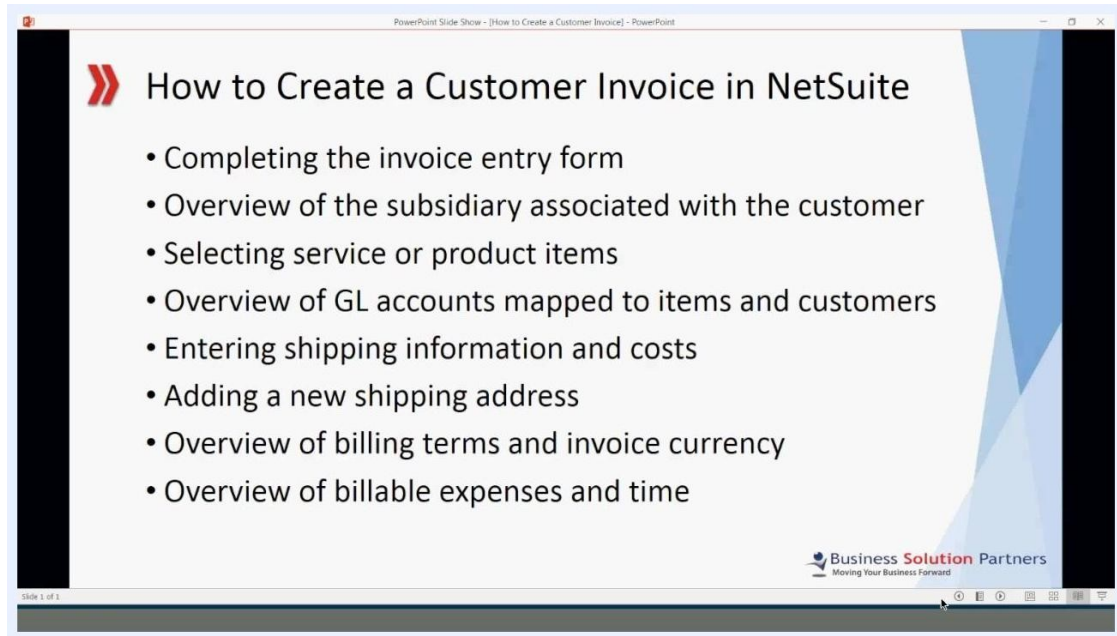
Invoice entry form with the Customer field dropdown open, showing "abm" typed in and "ABM Industries" selected, with the Invoice #, Date, and Posting Period fields visible nearby.

Step 3: Enter the customer

The Invoice Number field is pre-filled automatically (for example, 3093902). In the Customer field, type and select the customer name, such as "ABM Industries."

Step 4: Set the invoice date and posting period

The Date field defaults to today's date (for example, 7/7/2017), and the Posting Period defaults to the current month (for example, Jul 2017). Change either field if needed.



NetSuite home screen with the Customers menu expanded, showing Sales > Create Invoices highlighted, with dashboard widgets and navigation tabs visible in the background.

Step 5: Adjust the date and posting period if necessary

Update the Date field if the invoice should carry a different date than today, and update the Posting Period if you need to post to a different open period. You can only select open periods.

The screenshot shows the lower section of the Oracle NetSuite invoice entry form. The interface includes a top navigation bar with tabs like Activities, Billing, Customers, Vendors, Payroll and HR, Financial, Reports, Documents, Setup, Payments, Fixed Assets, Statistical Analysis, My Dashboard, and Support. Below this is a search bar and a user profile. The main form area is divided into several sections. On the left, there are fields for DEPARTMENT, CUSTOMER PRIORITY, PROMISE DATE (7/11/2017), PROMISE DATE (2) (7/11/2017), REASON FOR RETURN, and CONTRACT BASE. In the center, there are fields for CREATED DATE, EMAIL (info@abm.com), CONTACT(S) (Morris Rosenberg), COMM %, and CHANNEL. On the right, there are fields for STORE LOCATION, REQUIRES FRAUD REVIEW, FRAUD APPROVED, TOUCHPOINT, and LOYALTY POINTS (0). Below these fields is a section for DISCOUNT ITEM, RATE, and COUPON CODE. To the right of this is a PROMOTION dropdown and a Calculate button. Below the discount section, there are summary fields: Items 0.00, Billable Items 0.00, Billable Expenses 0.00, and Billable Time 0.00. At the bottom, there are buttons for Add Multiple and Clear All Lines. The bottom of the form features a table header with columns: ITEM*, QUANTITY, UNITS, INVENTORY DETAIL, DESCRIPTION, PRICE LEVEL, UNIT PRICE, AMOUNT, TAX CODE*, TAX RATE, OPTIONS, and GIFT CERTIFICATE.

Lower section of the invoice entry form showing custom fields such as Store Location, Requires Fraud Review, Touchpoint, and Loyalty Points, with the Items tab visible below.

Step 6: Enter project and billing dates (optional)

If your company tracks invoices by project, select the appropriate value in the Project field. If your company uses the Advanced Billing module, enter the Start Date and End Date for the billing period; the Start Date should reflect when the first billing takes place.

The screenshot displays the Oracle NetSuite 'Invoice' entry form. The 'Primary Information' section contains the following fields:

- CUSTOM FORM ***: Standard Product Invoice
- INVOICE #**: 3003902
- CUSTOMER ***: ABM Industries
- PROJECT**: (highlighted)
- DATE ***: 7/7/2017
- START DATE**: (empty)
- END DATE**: (empty)
- POSTING PERIOD ***: Jul 2017
- DUE DATE**: 8/6/2017
- PO #**: (empty)
- MEMO**: (empty)

A **Summary** table is located on the right side of the form:

Summary	
SUBTOTAL	0.00
DISCOUNT ITEM	0.00
TAX TOTAL	0.00
SHIPPING COST	0.00
HANDLING COST	0.00
GIFT CERTIFICATE	0.00
TOTAL	0.00

The **Sales Information** section includes:

- OPPORTUNITY**: (empty)
- SALES EFFECTIVE DATE**: (empty)
- EXCLUDE COMMISSIONS**: (checkbox)
- LEAD SOURCE**: (empty)
- PARTNER**: AL Systems Ltd

The **Classification** section shows:

- SUBSIDIARY**: US 2
- CLASS**: (empty)
- LOCATION ***: (empty)

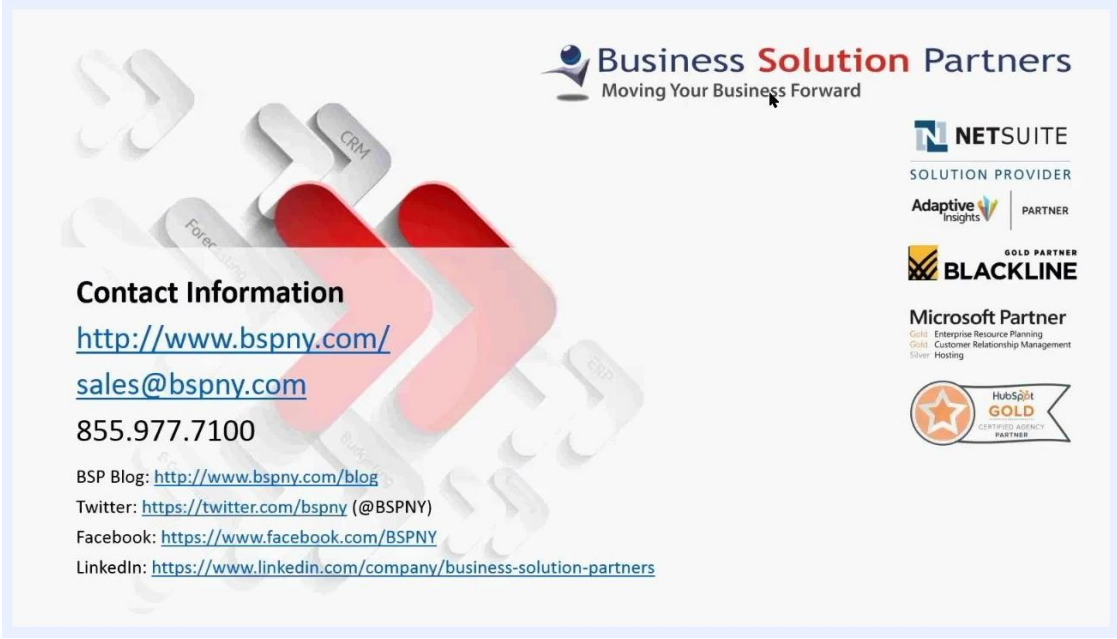
Invoice entry form showing the Project, Start Date, and End Date fields in the Primary Information section.

Step 7: Add a PO number and memo (optional)

Enter a purchase order number in the PO # field if you want to track the invoice by PO, and add any relevant notes in the Memo field.

Step 8: Review sales opportunity information (optional)

In the Sales Information section, complete the following fields if applicable:



The image shows a graphic for Business Solution Partners. On the left, there are several white 3D arrows pointing right, with labels 'CRM', 'ERP', 'HR', 'Marketing', and 'Sales' on them. A large red arrow points right across the center. To the right of the red arrow, the text 'Contact Information' is followed by the website <http://www.bspny.com/>, email sales@bspny.com, and phone number 855.977.7100. Below this, social media links are listed: BSP Blog: <http://www.bspny.com/blog>, Twitter: [@BSPNY](https://twitter.com/bspny), Facebook: <https://www.facebook.com/BSPNY>, and LinkedIn: <https://www.linkedin.com/company/business-solution-partners>. On the right side, there are logos for Business Solution Partners (Moving Your Business Forward), NETSUITE (SOLUTION PROVIDER), Adaptive Insights (PARTNER), BLACKLINE (GOLD PARTNER), Microsoft Partner (Gold, Silver, Enterprise Resource Planning, Customer Relationship Management, Hosting), and HubSpot (GOLD CERTIFIED AGENCY PARTNER).

Business Solution Partners
Moving Your Business Forward

NETSUITE
SOLUTION PROVIDER

Adaptive Insights | PARTNER

BLACKLINE
GOLD PARTNER

Microsoft Partner
Gold Enterprise Resource Planning
Silver Customer Relationship Management
Silver Hosting

HubSpot GOLD
CERTIFIED AGENCY PARTNER

Contact Information
<http://www.bspny.com/>
sales@bspny.com
855.977.7100

BSP Blog: <http://www.bspny.com/blog>
Twitter: [@BSPNY](https://twitter.com/bspny)
Facebook: <https://www.facebook.com/BSPNY>
LinkedIn: <https://www.linkedin.com/company/business-solution-partners>

Contact information for Business Solution Partners, including website, email, phone, and social media links, with partner logos.

- Opportunity: select the related sales opportunity.
- Sales Effective Date: enter the effective date for the sale.
- Lead Source: select the lead source from the dropdown.
- Partner: confirm or select the partner involved (for example, "AL Systems Ltd").

- Exclude Commissions: check this box if commissions should not be calculated for this invoice.

Primary Information

CUSTOM FORM *
Standard Product Invoice

INVOICE #
3003902

CUSTOMER *
ABM Industries

PROJECT

DATE *
7/7/2017

START DATE

END DATE

POSTING PERIOD *
Jul 2017

DUE DATE
8/6/2017

PO #

MEMO

Sales Information

OPPORTUNITY

SALES EFFECTIVE DATE

☐ EXCLUDE COMMISSIONS

LEAD SOURCE

PARTNER
AL Systems Ltd

Classification

SUBSIDIARY
US 2

CLASS

LOCATION *

Summary

SUBTOTAL	0.00
DISCOUNT ITEM	0.00
TAX TOTAL	0.00
SHIPPING COST	0.00
HANDLING COST	0.00
GIFT CERTIFICATE	0.00
TOTAL	0.00

Invoice entry form with editable Date (7/7/2017) and Posting Period (Jul 2017) fields, alongside Customer, Project, Due Date, PO #, and Memo fields.

Step 9: Review subsidiary and classification details

The Subsidiary field is automatically linked to the customer (for example, "US 2"), since each customer is associated with only one subsidiary. Every invoice for this customer posts to that assigned subsidiary.

The screenshot displays the Oracle NetSuite 'Invoice' form. The 'Primary Information' section includes fields for CUSTOM FORM (Standard Product Invoice), INVOICE # (3003902), CUSTOMER (ABM Industries), PROJECT, DATE (7/7/2017), START DATE, and END DATE. The 'POSTING PERIOD' is set to Jul 2017, and the DUE DATE is 8/6/2017. A 'Summary' table on the right shows all line items at 0.00, with a TOTAL of 0.00. The 'Sales Information' section includes OPPORTUNITY, SALES EFFECTIVE DATE, EXCLUDE COMMISSIONS (unchecked), LEAD SOURCE, and PARTNER (AL Systems Ltd). The 'Classification' section at the bottom shows SUBSIDIARY (US 2), CLASS, and LOCATION fields.

Summary	
SUBTOTAL	0.00
DISCOUNT ITEM	0.00
TAX TOTAL	0.00
SHIPPING COST	0.00
HANDLING COST	0.00
GIFT CERTIFICATE	0.00
TOTAL	0.00

Classification section showing the Subsidiary field set to US 2, along with Department, Class, and Location fields, Customer Priority, Promise Date, Email, and Contact(s) fields.

Step 10: Add department, class, and location

Select the appropriate Department if required, choose a Class if your company uses class tracking, and select the Location (for example, "Boston," which may be required for your company).

Step 11: Complete custom fields

Scroll through the form to check for custom fields specific to your firm, such as Store Location, Requires Fraud Review, Touchpoint, or Loyalty Points, and fill them in as required by your company's processes.

The screenshot shows the Oracle NetSuite 'Invoice' form. The top navigation bar includes tabs for Activities, Billing, Customers, Vendors, Payroll and HR, Financial, Reports, Documents, Setup, Payments, Fixed Assets, Statistical Analysis, My Dashboard, and Support. The 'Items' tab is selected, displaying fields for DISCOUNT ITEM, RATE, COUPON CODE, PROMOTION, and ENABLE ITEM LINE SHIPPING. A table for item entry is visible at the bottom, with columns for ITEM*, QUANTITY, UNITS, INVENTORY DETAIL, DESCRIPTION, PRICE LEVEL, UNIT PRICE, AMOUNT, TAX CODE*, TAX RATE, OPTIONS, and OPT CERTIFICATE. The table is currently empty, and the 'Add' button is highlighted.

Classification section with focus on the Class and Location dropdowns, alongside Department, Customer Priority, and Promise Date fields.

Step 12: Open the Items tab

Locate the Items tab among the invoice's financial tabs (Items, Shipping, Billing, Accounting, and others). This tab contains fields for discounts as well as the item entry grid.

Step 13: Apply a discount if applicable

In the Discount Item dropdown, select a preset discount if your firm tracks or offers them, such as "50% OFF," "Free Shipping," "Loyalty Program," "Partner Discount," "Standard 10% Discount," or "Standard 25% Discount." Enter a Rate or Coupon Code if required.

The screenshot displays the Oracle NetSuite web application interface. The top navigation bar includes the Oracle NetSuite logo, a search bar, and user information for Ramona Cedeno. Below this is a main menu with tabs for Activities, Billing, Customers, Vendors, Payroll and HR, Financial, Reports, Documents, Setup, Payments, Fixed Assets, Statistical Analysis, My Dashboard, and Support. The 'Billing' tab is currently selected. The main content area shows a form for a customer record, with fields for PROMISE DATE (7/11/2017), REASON FOR RETURN, CONTRACT BASE, CONTACT(S) (Morris Rosenberg), COMM %, CHANNEL, and LOYALTY POINTS (0). A 'DISCOUNT ITEM' dropdown menu is open, showing a list of options: 50% OFF, Free Shipping, Loyalty Program (highlighted), Partner Discount, Standard 10% Discount, and Standard 25% Discount. To the right of the dropdown is a 'PROMOTION' dropdown and a 'Calculate' button. Below the dropdown is a table with columns: ITEM#, QUANTITY, UNITS, INVENTORY DETAIL, DESCRIPTION, PRICE LEVEL, UNIT PRICE, AMOUNT, TAX CODE*, TAX RATE, OPTIONS, and GIFT CERTIFICATE. The table is currently empty, with a prompt '<Type then tab>' in the first column. At the bottom of the table are buttons for 'Add', 'Cancel', 'Copy Previous', 'Insert', and 'Remove'.

Discount Item dropdown expanded, showing options including 50% OFF, Free Shipping, Loyalty Program, Partner Discount, Standard 10% Discount, and Standard 25% Discount.

Step 14: Enter the product or service

In the ITEM field, type the name or part of the name of the product or service you're selling. For example, type "wireless mouse" to search for the Logitech Curve Wireless Mouse, then select the correct item from the search results.

The screenshot shows the Oracle NetSuite interface. The top navigation bar includes tabs for Activities, Billing, Customers, Vendors, Payroll and HR, Financial, Reports, Documents, Setup, Payments, Fixed Assets, Statistical Analysis, My Dashboard, and Support. The 'Items' tab is selected. Below the navigation bar, there are several input fields: REASON FOR RETURN, CONTRACT BASE, CHANNEL, LOYALTY POINTS, and LAST MODIFIED DATE. The 'Items' section includes a table with columns: ITEM*, QUANTITY, UNITS, INVENTORY DETAIL, DESCRIPTION, PRICE LEVEL, UNIT PRICE, AMOUNT, TAX CODE*, TAX RATE, OPTIONS, and GIFT CERTIFICATE. The 'ITEM*' column is active, and the text 'wire' is entered. Below the table, there are buttons for 'Add', 'Cancel', 'Copy Previous', 'Insert', and 'Remove'. At the bottom, there are buttons for 'Save', 'Cancel', 'Auto Fill', 'Reset', and 'Actions'.

Cursor in the ITEM field with "wire" typed in, ready to select a product item.

Step 15: Handle inventory warnings

If the selected item is out of stock, a warning popup appears, such as: "Wireless Mouse: Logitech Curve Wireless Mouse: You have only 0 available at this location (1 back ordered, 0 on order)." Click OK to acknowledge the warning and continue adding the item to the invoice.

The screenshot shows the Oracle NetSuite interface for an invoice entry. The 'Items' tab is selected in the top navigation bar. The form displays various fields for item entry, including 'DISCOUNT ITEM', 'RATE', 'COUPON CODE', 'PROMOTION', and 'DISCOUNT REASON'. Below these fields is a summary row showing 'Items 0.00', 'Billable Items 0.00', 'Billable Expenses 0.00', and 'Billable Time 0.00'. At the bottom, there is an 'Add Multiple' button and a 'Clear All Lines' button. The main table for item entry has columns for 'ITEM*', 'QUANTITY', 'UNITS', 'INVENTORY DETAIL', 'DESCRIPTION', 'PRICE LEVEL', 'UNIT PRICE', 'AMOUNT', 'TAX CODE*', 'TAX RATE', 'OPTIONS', and 'GIFT CERTIFICATE'. The first row of the table is currently empty, and the 'Add' button is highlighted.

Items tab selected in the invoice entry form, showing Discount Item, Rate, Coupon Code, Promotion, and Discount Reason fields above the item entry grid.

Step 16: Review pre-filled item details

After selecting the item, confirm that fields such as Description, List Price, Unit Price, Amount, Tax Code, and Tax Rate are populated correctly based on the item setup, along with Quantity and Units. Make adjustments if anything is incorrect before continuing.

Step 17: Add the item to the invoice

With the item details confirmed—Quantity **1**, Description "Logitech Curve Wireless Mouse," Price Level "List Price," Unit Price **100.00**, Amount **100.00**, Tax Code "-Not Taxable-," and Tax Rate **0.0%**—click the blue Add button to add the item to the invoice.

The screenshot shows the Oracle NetSuite interface for invoice entry. The 'Items' tab is selected, displaying a table with the following data:

ITEM*	QUANTITY	UNITS	INVENTORY DETAIL	DESCRIPTION	PRICE LEVEL	UNIT PRICE	AMOUNT	TAX CODE*	TAX RATE	OPTIONS	GIFT CERTIFICATE
Wireless Mouse - Logitech Curve	1			Logitech Curve Wireless Mouse	List Price	100.00	100.00	-Not Taxable-	0.0%		

Below the table, there are buttons for 'Add', 'Cancel', 'Copy Previous', 'Insert', and 'Remove'. The 'Add' button is highlighted in blue. At the bottom of the screen, there are buttons for 'Save', 'Cancel', 'Auto Fill', 'Reset', and 'Actions'.

Invoice entry screen with the Items tab active, showing "Wireless Mouse - Logitech Curve" selected, Description "Logitech Curve Wireless Mouse," List Price and Unit Price both 100.00, Amount 100.00, Tax Code "-Not Taxable-," and Tax Rate 0.0%.

Step 18: Verify the item was added

Confirm the item now appears in the summary section below the grid, with the total updated under Items (for example, [Items 100.00](#)). Repeat the item entry steps for each additional item you need to bill.

The screenshot shows the NetSuite invoice screen. The top navigation bar includes links for Activities, Billing, Customers, Vendors, Payroll and HR, Financial, Reports, Documents, Setup, Payments, Fixed Assets, Statistical Analysis, My Dashboard, and Support. The main form area has a 'CONTRACT BASE' dropdown and a 'CHANNEL' dropdown. Below this is a 'LAST MODIFIED DATE' field. The 'Items' tab is selected, showing a summary section with 'Items 100.00', 'Billable Items 0.00', 'Billable Expenses 0.00', and 'Billable Time 0.00'. There are buttons for 'Add Multiple' and 'Clear All Lines'. Below the summary is a table with columns: ITEM*, QUANTITY, UNITS, INVENTORY DETAIL, DESCRIPTION, PRICE LEVEL, UNIT PRICE, AMOUNT, TAX CODE*, TAX RATE, OPTIONS, and GIFT CERTIFICATE. The table contains one row for 'Wireless Mouse - Logitech Curve Wireless' with a quantity of 1, unit price of 100.00, and amount of 100.00. The tax code is 'Not Taxable' and the tax rate is 0.0%. Below the table are buttons for 'Add', 'Cancel', 'Copy Previous', 'Insert', and 'Remove'. At the bottom are buttons for 'Save', 'Cancel', 'Auto Fill', 'Reset', and 'Actions'.

ITEM*	QUANTITY	UNITS	INVENTORY DETAIL	DESCRIPTION	PRICE LEVEL	UNIT PRICE	AMOUNT	TAX CODE*	TAX RATE	OPTIONS	GIFT CERTIFICATE
Wireless Mouse - Logitech Curve Wireless	1			Logitech Curve Wireless Mouse	List Price	100.00	100.00	Not Taxable	0.0%		

NetSuite invoice screen showing Billable Items, Billable Expenses, and Billable Time all set to 0.00.

Step 19: Review billable items, expenses, and time

Above the item list, review the Billable Items, Billable Expenses, and Billable Time summary fields. These sections display transactions previously marked as billable for the customer, such as travel and expense entries. If there are none for this client, the fields will read **0.00** and you can proceed.

The screenshot shows the NetSuite invoice screen. At the top, there's a navigation bar with tabs like Activities, Billing, Customers, Vendors, Payroll and HR, Financial, Reports, Documents, Setup, Payments, Fixed Assets, Statistical Analysis, My Dashboard, and Support. Below this, there's a section for 'REASON FOR RETURN' with dropdowns for 'REASON FOR RETURN', 'CHANNEL', and 'LOYALTY POINTS'. There's also a 'DISCOUNT ITEM' dropdown and a 'PROMOTION' dropdown with a 'Calculate' button. Below these, there's a summary section with fields for 'Items 0.00', 'Billable Items 0.00', 'Billable Expenses 0.00', and 'Billable Time 0.00'. There are buttons for 'Add Multiple' and 'Clear All Lines'. Below this is a table with columns: ITEM*, QUANTITY, UNITS, INVENTORY DETAIL, DESCRIPTION, PRICE LEVEL, UNIT PRICE, AMOUNT, TAX CODE*, TAX RATE, OPTIONS, and GIFT CERTIFICATE. The table contains one row: 'Wireless Mouse : Logitech Curve' with quantity 1, unit price 100.00, and amount 100.00. Below the table, there are buttons for 'Add', 'Cancel', 'Copy Previous', 'Insert', and 'Remove'. At the bottom, there are buttons for 'Save', 'Cancel', 'Auto Fill', 'Reset', and 'Actions'.

NetSuite invoice screen showing the item added to the summary section, with the Items total updated to 100.00.

Step 20: Open the Shipping tab and enter shipping details

Click the Shipping tab, then review and update the following fields:

- Ship Date: defaults to today's date (for example, **7/7/2017**); change if necessary.
- Shipping Carrier: select from available options.
- Shipping Method: leave blank or select as required.
- Shipping Cost: enter the shipping cost (defaults to **0.00**).
- Handling Cost: enter if applicable (defaults to **0.00**).
- FOB: enter if required.

- Additional Tracking #: enter if available.

The screenshot shows the NetSuite 'Invoice' screen. The 'Items' tab is selected, and the 'Add' button is highlighted. The item 'Wireless Mouse : Logitech Curve' is listed with a quantity of 1 and an amount of 100.00. The 'Add' button is highlighted with a blue border.

ITEM*	QUANTITY	UNITS	INVENTORY DETAIL	DESCRIPTION	PRICE LEVEL	UNIT PRICE	AMOUNT	TAX CODE*	TAX RATE	OPTIONS	OPT CERTIFICATE
Wireless Mouse : Logitech Curve	1			Logitech Curve Wireless Mouse	List Price	100.00	100.00	-Not Taxable	0.0%		

NetSuite invoice screen with item details filled in and the Add button highlighted, showing item Wireless Mouse : Logitech Curve with Quantity 1 and Amount 100.00.

The shipping address appears on the right (for example, ABM Industries, 777 Sheridan Dr, Tonawanda NY 14150, United States).

The screenshot shows the NetSuite 'Shipping' tab. The 'Shipping Information' section contains fields for Ship Date (7/7/2017), Shipping Carrier (FedEx/More), Shipping Method, Shipping Cost (0.00), Handling Cost (0.00), FOB, and Additional Tracking #. The 'Shipping Address' section shows the ship to address: 777 Sheridan Dr, ABM Industries, 777 Sheridan Dr, Tonawanda NY 14150, United States.

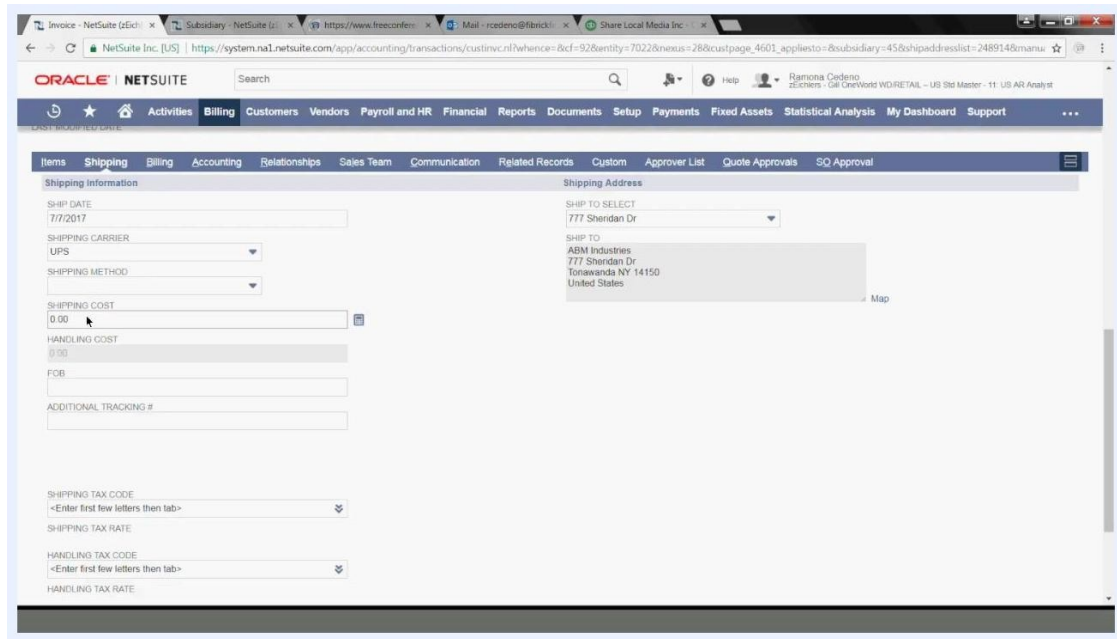
NetSuite Shipping tab with fields for Ship Date, Shipping Carrier set to FedExMore, Shipping Method, Shipping Cost, Handling Cost, FOB, Additional Tracking #, and the shipping address.

Step 21: Select the shipping carrier

Use the dropdown menu to choose the shipping carrier, such as [FedExMore](#) or [UPS](#), selecting whichever carrier your internal team has assigned.

Step 22: Add a shipping cost to the invoice

If you enter a value in the Shipping Cost field, it will be added to the invoice total. Make sure all shipping-related fields are completed as required.



The screenshot shows the NetSuite interface for creating an invoice. The 'Shipping' tab is selected in the top navigation bar. The 'Shipping Information' section on the left contains the following fields: 'SHIP DATE' (7/7/2017), 'SHIPPING CARRIER' (UPS), 'SHIPPING METHOD' (dropdown), 'SHIPPING COST' (0.00), 'HANDLING COST' (0.00), 'FOB' (dropdown), and 'ADDITIONAL TRACKING #' (text field). The 'Shipping Address' section on the right shows 'SHIP TO SELECT' (777 Sheridan Dr) and 'SHIP TO' (ABM Industries, 777 Sheridan Dr, Tonawanda NY 14150, United States). The 'Shipping Tax Code' and 'Shipping Tax Rate' fields are also visible at the bottom.

NetSuite Shipping tab with UPS selected as the carrier and the Shipping Cost field highlighted.

Step 23: Review the shipping address

Confirm the Shipping Information fields and, under Shipping Address, verify the current address (for example, Ship to Select **777 Sheridan Dr**, with the full address for ABM Industries shown below it). Note that the ability to select or add shipping addresses depends on a setting enabled in your account.

The screenshot shows the NetSuite interface with the 'Shipping' tab selected. The 'Shipping Information' section on the left contains fields for 'SHIP DATE' (7/7/2017), 'SHIPPING CARRIER' (a dropdown menu with 'UPS' and 'FedExMore' visible), 'SHIPPING COST' (0.00), 'HANDLING COST' (0.00), 'FOB', 'ADDITIONAL TRACKING #', 'SHIPPING TAX CODE', 'SHIPPING TAX RATE', 'HANDLING TAX CODE', and 'HANDLING TAX RATE'. The 'Shipping Address' section on the right shows 'SHIP TO SELECT' as '777 Sheridan Dr' and 'SHIP TO' as 'ABM Industries, 777 Sheridan Dr, Tonawanda NY 14150, United States'. A 'Map' button is located next to the address.

NetSuite Shipping tab with the Shipping Carrier dropdown expanded, showing the options UPS and FedExMore.

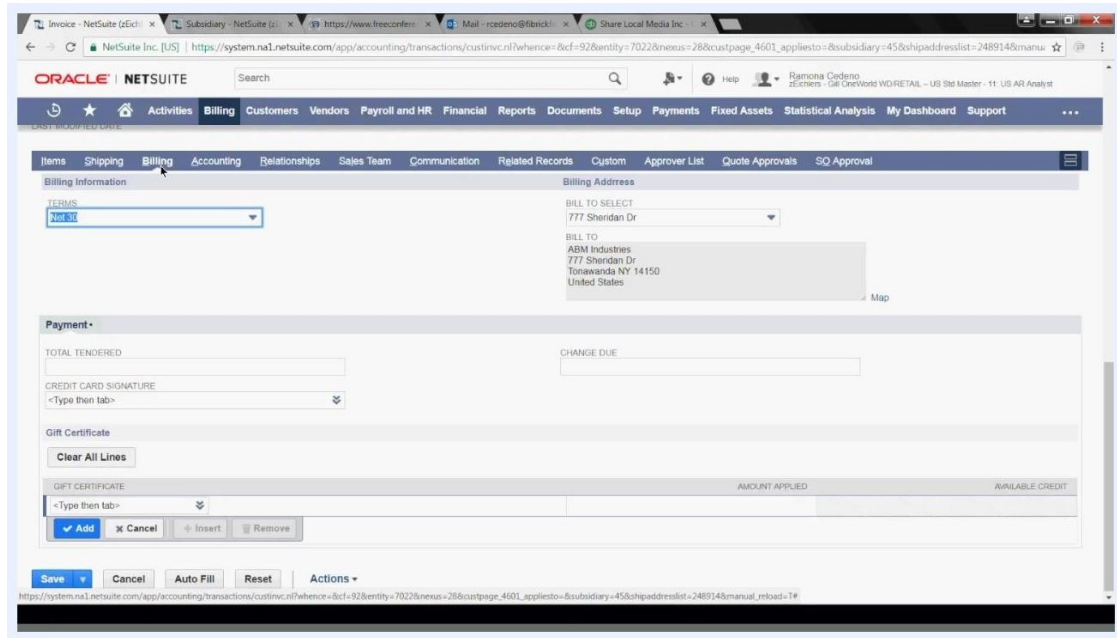
This screenshot is similar to the previous one, but the 'SHIPPING METHOD' dropdown menu is expanded instead of the carrier. The 'SHIPPING CARRIER' is now set to 'UPS'. The 'SHIPPING METHOD' dropdown shows several options, including 'Standard', 'Next Business Day', and 'Next Business Day AM'. The rest of the form, including the shipping address and costs, remains the same.

NetSuite Shipping tab showing the shipping fields and the shipping address for ABM Industries at 777 Sheridan Dr, Tonawanda NY 14150, United States.

Step 24: Add or select a shipping address

To change the shipping address, click the dropdown under Ship to Select.

Options include existing addresses (such as [777 Sheridan Dr](#)), - [New](#) - to add a new address, or - [Custom](#) - to enter a custom address for this shipment.

The screenshot shows the NetSuite interface with the 'Billing' tab selected. The 'Billing Information' section is active, displaying a 'TERMS' dropdown menu with 'Net 30' selected. To the right, the 'Billing Address' section shows a dropdown menu for 'SHIP TO SELECT' with '777 Sheridan Dr' selected. Below this, the 'BILL TO' address is listed as 'ABM Industries, 777 Sheridan Dr, Tonawanda NY 14150, United States'. The 'Payment' section includes fields for 'TOTAL TENDERED', 'CREDIT CARD SIGNATURE', 'CHANGE DUE', and 'GIFT CERTIFICATE'. The 'GIFT CERTIFICATE' section has a table with columns for 'GIFT CERTIFICATE', 'AMOUNT APPLIED', and 'AVAILABLE CREDIT'. The bottom of the screen shows 'Save', 'Cancel', 'Auto Fill', 'Reset', and 'Actions' buttons.

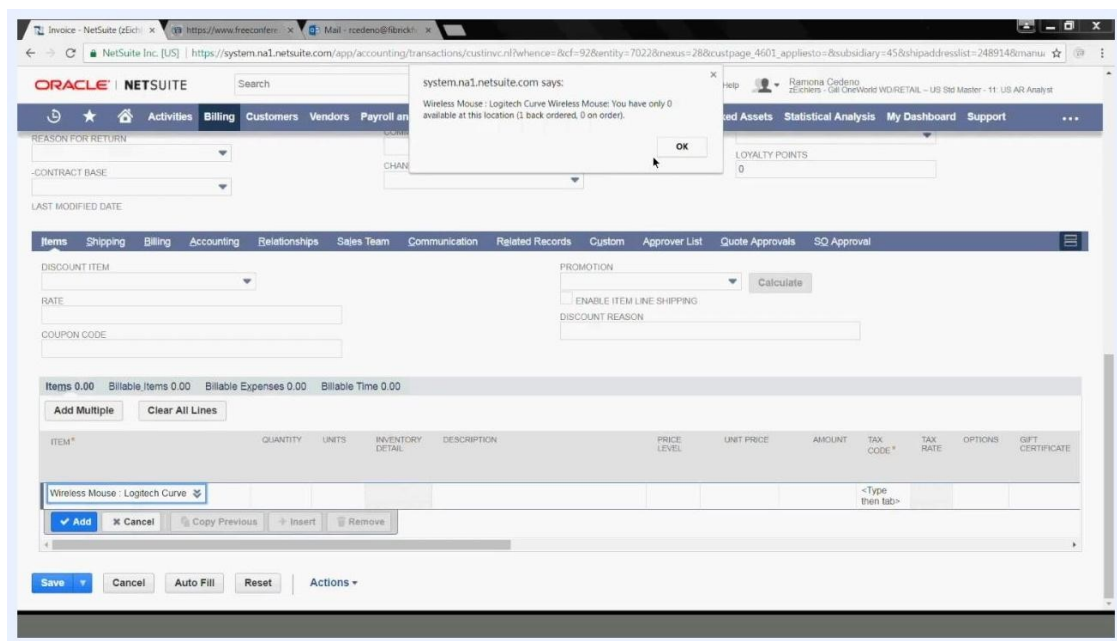
Dropdown menu under Ship to Select showing the options - New -, - Custom -, and 777 Sheridan Dr.

Step 25: Review and edit billing information

Click the Billing tab to access billing details. In the Billing Information section, set the Terms (for example, [Net 30](#), with other options including [1% 10 Net 30](#), [2% 10 Net 30](#), [Due on receipt](#), [Net 15](#), and [Net 60](#)), and enter values for Credit Card Signature, Gift Certificate, Total Tendered, or Change Due as applicable. The Billing Address section on the right lets you select or change the billing address, similar to the shipping address.

Step 26: Configure accounting information

Click the Accounting tab to review account-related fields. In the Account Information section, confirm the Account (for example, [1100 Accounts Receivable](#)), the Currency (defaults to the subsidiary's currency, for example [USD](#)), and the Exchange Rate (defaults to the current rate for the selected currency). Additional fields may include Sales / SQ FT, Items Sold, and Ave \$ Per TRX. In the Revenue and Gross Profit sections, review or enter values such as Estimated Gross Profit, Estimated Gross Profit Percent, Estimated Extended Cost, Margin, Wages Cost, Wages, TRXCOUNT, and Ave Items Per TRX. Some of these fields may be custom to your company.



Popup warning stating that no inventory is available for the Wireless Mouse: Logitech Curve Wireless Mouse, with an OK button.

Oracle | NETSUITE

Search

Help Ramona Cedeño 25 Oct 2017 US Standard WDR/ETAIL - US Std Master - 11 US All Analyst

Activities Billing Customers Vendors Payroll and HR Financial Reports Documents Setup Payments Fixed Assets Statistical Analysis My Dashboard Support

DEPARTMENT US 2

CUSTOMER PRIORITY

PROMISE DATE 7/11/2017

PROMISE DATE (2) 7/11/2017

REASON FOR RETURN

CONTRACT BASE

LAST MODIFIED DATE

CREATED DATE

EMAIL info_@abm.com

CONTACT(S) Morris Rosenberg

COMM %

CHANNEL

STORE LOCATION

REQUIRES FRAUD REVIEW

FRAUD APPROVED

TOUCHPOINT

LOYALTY POINTS 0

Items Shipping Billing Accounting Relationships Sales Team Communication Related Records Custom Approver List Quote Approvals SQ Approval

Contacts

Remove All Clear All Lines

CONTACT*	JOB TITLE	SUBSIDIARY*	EMAIL	MAIN PHONE	ROLE
Morris Rosenberg	Principal	US 2	mwr_@abm.com	(866) 226-2638	Primary Contact

Add Cancel Insert Remove

Save Cancel Auto Fill Reset Actions

Accounting tab with Account set to 1100 Accounts Receivable, Currency set to USD, and gross profit fields visible.

Step 27: Review customer relationship information

Click the Relationships tab to view customer contacts. In the Contacts section, review associated contacts, such as Morris Rosenberg (Job Title: Principal, Subsidiary: US 2, Email: mr_@abm.com, Main Phone: (866) 226-2838, Role: Primary Contact). Use the Add, Cancel, Insert, or Remove buttons to manage contacts as needed.

The screenshot displays the Oracle NetSuite interface. The top navigation bar includes tabs for Activities, Billing, Customers, Vendors, Payroll and HR, Financial, Reports, Documents, Setup, Payments, Fixed Assets, Statistical Analysis, My Dashboard, and Support. The 'Customers' tab is active, and the 'Relationships' sub-tab is selected. The main content area shows a form for a customer contact. The form includes fields for DEPARTMENT (Boston), CUSTOMER PRIORITY, PROMISE DATE (7/11/2017), PROMISE DATE (2) (7/11/2017), REASON FOR RETURN, CONTRACT BASE, LAST MODIFIED DATE, CREATED DATE, EMAIL (mr_@abm.com), CONTACT(S) (Morris Rosenberg), COMM %, CHANNEL, STORE LOCATION, REQUIRES FRAUD REVIEW, FRAUD APPROVED, TOUCHPOINT, and LOYALTY POINTS (0). Below the form, there is a table with the following data:

CONTACT*	JOB TITLE	SUBSIDIARY*	EMAIL	MAIN PHONE	ROLE
Morris Rosenberg	Principal	US 2	mr_@abm.com	(866) 226-2838	Primary Contact

Below the table, there are buttons for Add, Cancel, Insert, and Remove. At the bottom of the form, there are buttons for Save, Cancel, Auto Fill, Reset, and Actions.

Relationships tab showing contact information for Morris Rosenberg, Principal at ABM Industries, with email and phone number.

Step 28: Assign sales team members

Click the Sales Team tab. In the Employee section, review or assign the sales rep for your firm (for example, Caroline Hert, Sales Role: Sales Rep, Primary: Yes, Contribution %: 100.0%). Use the Choose Team dropdown to select a team if needed, click Add to assign additional sales reps, or Remove to delete existing ones.

The screenshot shows the NetSuite interface for the 'Sales Team' tab. The top navigation bar includes 'Activities', 'Billing', 'Customers', 'Vendors', 'Payroll and HR', 'Financial', 'Reports', 'Documents', 'Setup', 'Payments', 'Fixed Assets', 'Statistical Analysis', 'My Dashboard', and 'Support'. The 'Sales Team' tab is selected, and the 'Communication' sub-tab is active. The main form displays customer information, including 'CUSTOMER PRIORITY', 'PROMISE DATE', 'PROMISE DATE (2)', 'REASON FOR RETURN', 'CONTRACT BASE', 'LAST MODIFIED DATE', 'CREATED DATE', 'EMAIL', 'CONTACT(S)', 'COMM %', 'CHANNEL', 'STORE LOCATION', 'REQUIRES FRAUD REVIEW', 'FRAUD APPROVED', 'TOUCHPOINT', and 'LOYALTY POINTS'. Below the form, there is a 'CHOOSE TEAM' dropdown and an 'UPDATE CUSTOMER' checkbox. A table lists the sales team members:

EMPLOYEE *	SALES ROLE *	PRIMARY	CONTRIBUTION %
Caroline Hert	Sales Rep	Yes	100.0%

Buttons for 'Add', 'Cancel', 'Insert', and 'Remove' are available. At the bottom, there are 'Save', 'Cancel', 'Auto Fill', 'Reset', and 'Actions' buttons.

NetSuite Sales Team tab showing Caroline Hert listed as Sales Rep, Primary, with 100% contribution.

Step 29: Configure communication options

Click the Communication tab. Under Messages, choose how to send the invoice by checking To be Printed, To be Faxed (confirming the fax number), or To be E-mailed (confirming the recipient email). Enter a custom note in the Customer Message box, or select a predefined message from the Select Message dropdown.

The screenshot shows the Oracle NetSuite interface with the 'Communication' tab selected. The top navigation bar includes 'Activities', 'Billing', 'Customers', 'Vendors', 'Payroll and HR', 'Financial', 'Reports', 'Documents', 'Setup', 'Payments', 'Fixed Assets', 'Statistical Analysis', 'My Dashboard', and 'Support'. The 'Communication' sub-tab is active, showing a 'Messages' section with options to 'Print', 'Fax', or 'Email' the invoice. Below this, there is a 'Customer Message' field and a 'Select Message' dropdown. The 'Contacts' section is also visible, showing a table with columns for 'CONTACT*', 'JOB TITLE', 'SUBSIDIARY*', 'EMAIL', 'MAIN PHONE', and 'ROLE'. The table contains one entry for 'Morris Rosenberg' with the role 'Primary Contact'. The bottom of the screen shows a 'Save' button and other action buttons.

CONTACT*	JOB TITLE	SUBSIDIARY*	EMAIL	MAIN PHONE	ROLE
Morris Rosenberg	Principal	US 2	mr_@abm.com	(866) 226-2638	Primary Contact

Communication tab with options to print, fax, or email the invoice, and a field for a custom customer message.

Step 30: Review related records

Click the Related Records tab to link related transactions, such as a returns credit memo, to this invoice after it is saved and other transactions are posted. Use the Returns Credit Memo dropdown to select a related record if applicable.

The screenshot shows the Oracle NetSuite interface for a customer record. The 'Related Records' tab is selected in the top navigation bar. Below the tab, there is a section for 'CHOOSE TEAM' with a dropdown menu and an 'UPDATE CUSTOMER' checkbox. A 'Clear All Lines' button is also present. The main area displays a table with columns: EMPLOYEE*, SALES ROLE*, PRIMARY, and CONTRIBUTION %. The table contains one row for 'Caroline Hert' with a 'Sales Rep' role, marked as 'Yes' for primary, and a '100.0%' contribution. Below the table are buttons for 'Add', 'Cancel', 'Insert', and 'Remove'. At the bottom, there are buttons for 'Save', 'Cancel', 'Auto Fill', 'Reset', and an 'Actions' dropdown menu.

EMPLOYEE*	SALES ROLE*	PRIMARY	CONTRIBUTION %
Caroline Hert	Sales Rep	Yes	100.0%

Related Records tab with the Returns Credit Memo dropdown visible.

Step 31: Enter custom information

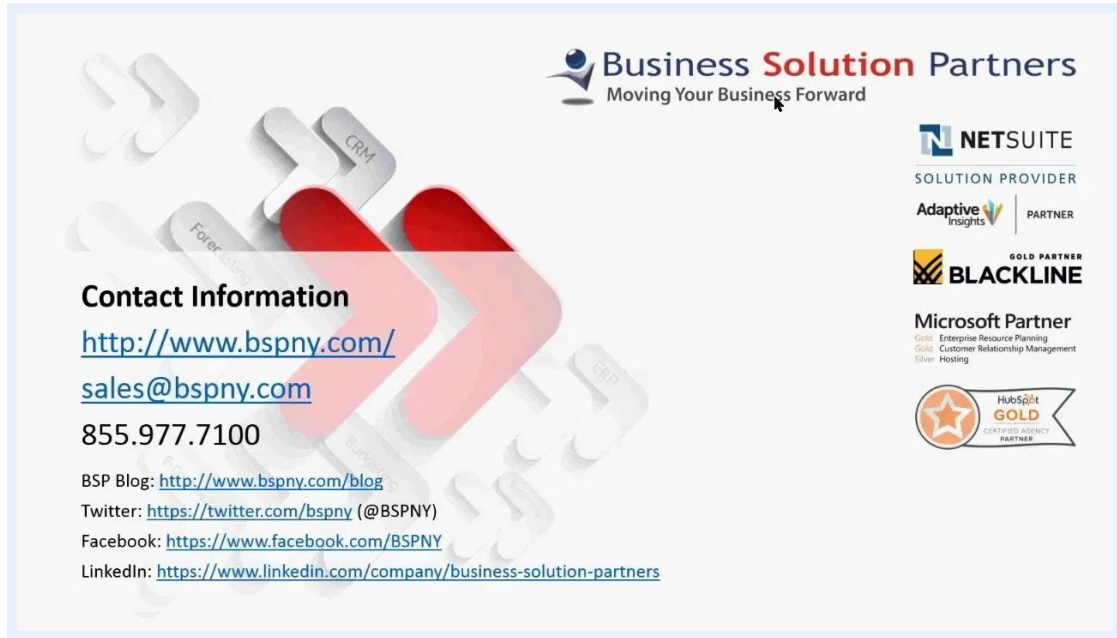
Click the Custom tab and enter any additional information required by your organization, such as Delivery Instructions, an Item (type the item and press Tab), Serial/Lot Number, and Copy Employees to notify (for example, Adam Baum, Alia Zimm, Alex Wolfe, Alice Liddell, Alicia Brown). Additional custom fields may include Item (2), POS Created From, Sales Associate, and POS Status.

The screenshot shows the Oracle NetSuite interface for a customer record. The 'Custom' tab is active, displaying various fields for customer information. The top navigation bar includes tabs like Activities, Billing, Customers, Vendors, Payroll and HR, Financial, Reports, Documents, Setup, Payments, Fixed Assets, Statistical Analysis, My Dashboard, and Support. The main form area is divided into sections: 'US 2' (Department, Customer Priority, Promise Date, Promise Date (2), Reason for Return, Contract Base, Last Modified Date), 'CREATED DATE' (Email, Contact(s), Comm %, Channel), 'STORE LOCATION' (Requires Fraud Review, Fraud Approved, Touchpoint, Loyalty Points), 'CUSTOMER PHONE' (Phone Number), 'DELIVERY INSTRUCTIONS' (Item, Serial/Lot Number), 'COPY EMPLOYEES' (List of employees: Adam Baum, Alia Zimm, Alex Wolfe, Alice Liddell, Alicia Brown), 'ITEM (2)' (Type then tab), 'POS CREATED FROM' (Type then tab), 'SALES ASSOCIATE' (Type then tab), and 'POS STATUS' (Type then tab). At the bottom, there are buttons for Save, Cancel, Auto Fill, Reset, and Actions.

Custom tab with fields for delivery instructions, item, serial/lot number, and a list of employees to copy.

Step 32: Save the invoice

Review all entered information for accuracy, then click the Save button at the bottom left of the screen.



Save button highlighted at the bottom of the invoice entry screen.

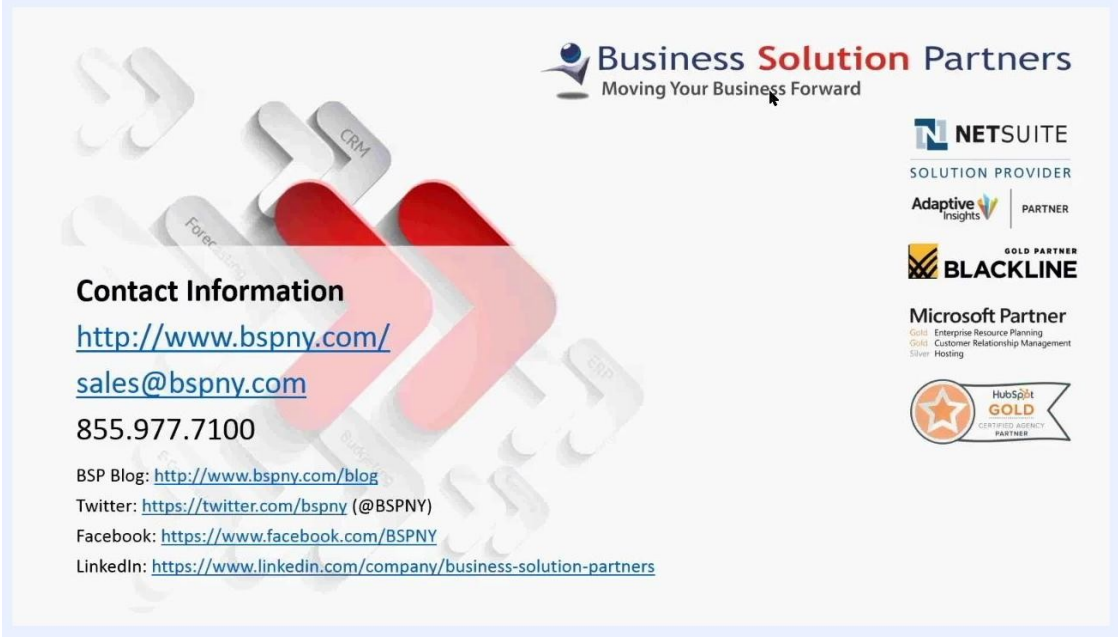
Step 33: Confirm the invoice was created

After saving, a confirmation message appears at the top of the screen:

"Confirmation: Transaction successfully Saved." The invoice summary displays the Invoice #, Customer, Status (OPEN), Date, Due Date, Subtotal, Total, and Amount Due (for example, Invoice #3093902 for ABM Industries, dated 7/7/2017, due 8/6/2017, with a Subtotal, Total, and Amount Due of 100.00). From here, you can click Edit to make changes, click Accept Payment to record a payment, or use the Actions menu for additional options.

The screenshot displays the Oracle NetSuite 'Invoice' entry form. The 'Primary Information' section includes fields for INVOICE # (3093902), CUSTOMER *, DATE * (7/7/2017), and DUE DATE (8/6/2017). The 'Sales Information' section includes OPPORTUNITY and LEAD SOURCE. A dropdown menu for 'FORM' is open, showing options like 'Primary Invoice Form + Warranty', 'Primary Invoice Form + Inventory Detail', 'Primary Invoice Form + Rev Rec', 'Primary Invoice Form + Warranty', 'Standard Finance Charge', 'Standard Product Invoice', 'Standard Professional Invoice', 'Standard Progress Invoice', and 'Standard Service Invoice'. The 'Summary' table on the right shows SUBTOTAL 0.00, TAX TOTAL 0.00, and TOTAL 0.00. The bottom of the form shows 'Items 0.00', 'Biliable Items 0.00', 'Biliable Expenses 0.00', and 'Biliable Time 0.00'.

Invoice entry form with the Date field set to 7/7/2017 and the Posting Period set to Jul 2017, with Due Date, PO #, and Memo fields visible.



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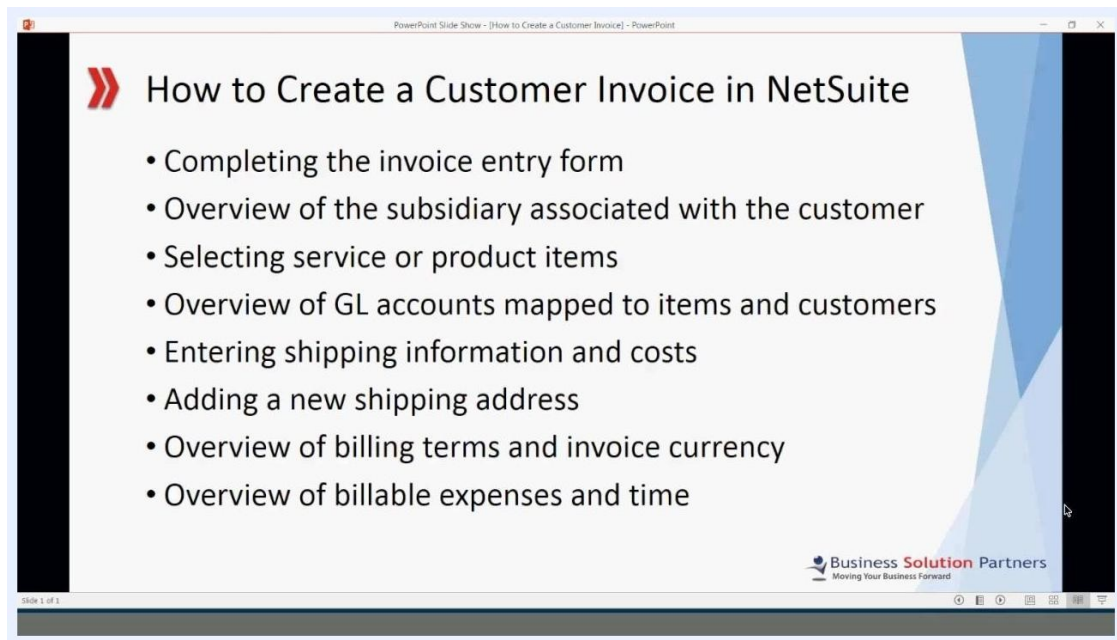
Microsoft Partner
Gold Enterprise Resource Planning
Gold Customer Relationship Management
Silver Hosting

HubSpot GOLD
CERTIFIED AGENCY PARTNER

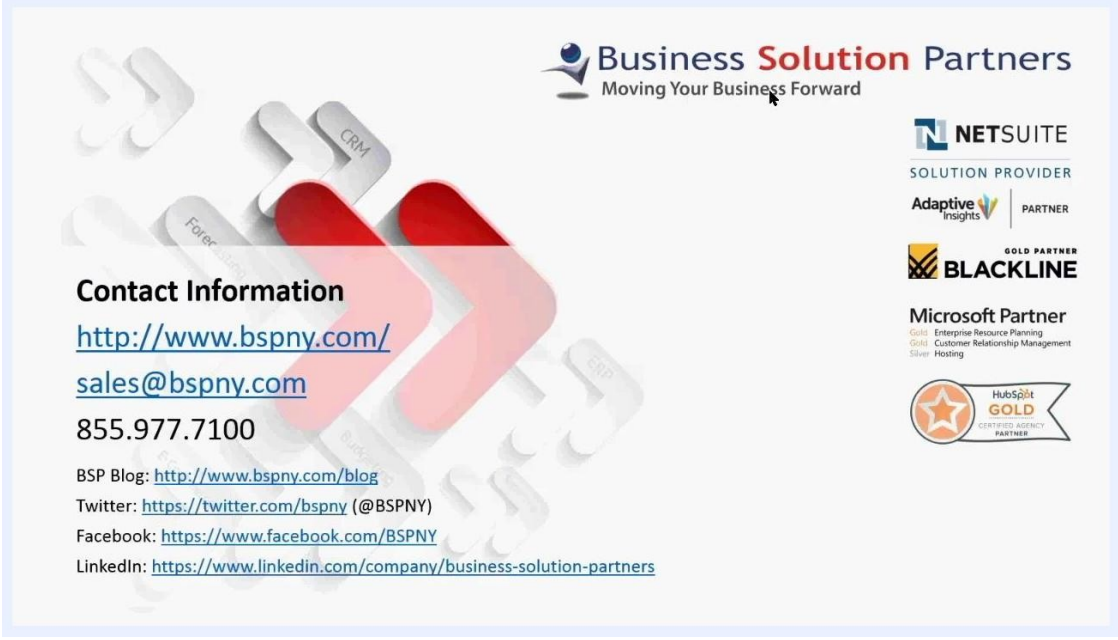
Confirmation screen showing invoice 3093902 for ABM Industries, status OPEN, with the invoice summary and action buttons.

What's next

Now that you know how to create an invoice in NetSuite, you can apply the same process to bill customers for products or services, add multiple line items, apply discounts, and account for billable expenses and time. If you need to create a new service or product item, or associate an item with a GL account, refer to your item setup documentation before returning to the invoice entry form. For further assistance, support and training resources are available through your NetSuite partner.



Invoice entry form with the Form dropdown expanded, showing options such as Standard Product Invoice and Standard Professional Invoice, alongside fields like Invoice #, Customer, Date, and Terms.



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