

# **Progress Payment Invoicing User Manual**

# Table of Contents

Setup	2
Subscription Setup – Purchase your license	2
Cancelling the Subscription	7
Assigning Permission Sets	7
Progress Payment Setup	8
User Guide	9
Sales Progress Payments	9
Progress Payment Group	10
Create Progress Invoices for Sales Orders.	10
Allocate Progress Payments when Invoicing Sales Orders	12
Find Progress Payment Documents	15
Purchase Progress Payments	17
Progress Payment Group	17
Create Progress Invoices for Purchase Orders	18
Allocate Progress Payments when Invoicing Purchase Orders	20
Find Progress Payment Documents	23
FAQ	24
What No. Series are used when processing Progress Payment Invoices?	24
I made a Progress Payment Invoice for too much, what should I do?	25
Can I post several Progress Payment Invoices for an order?	25
Do I need to apply payments against the Progress Payment Invoices?	25
Do I have to post my shipment or receipt before I post a Progress Payment Invoice?	25



# Setup

The Progress Payment Invoicing app is installed and setup per company. When using this app with different companies, you must follow the following instructions in each company. Note that you must be a Global Administrator in order to install and purchase the app.

### Subscription Setup – Purchase your license

1) Open the Extension Marketplace

ell me what you want to do	2 X
extension	
Go to Pages and Tasks	Show all (4
> Extension Management	Administration
> Extension Marketplace	Administration
> Extension Installation Status	Administration

2) Search "Progress Payment Invoicing" in the AppSource to find the Progress Payment Invoicing app and open the information page.

AppSource Apps for Busines	s Central	
Apps (0) Other apps $\checkmark$		progress payment invoicing
Search results for "progre	ss payment invoicing″	1↓ Sort By: Best m
Showing 4 results in apps. Clear searc		<u></u>
All socialta		
All results		
All results		
All results	ଷ	
Progress Payment	Invoicing Plan	
Progress Payment Invoicing		
Progress Payment	Invoicing Plan	
Progress Payment Invoicing AP Commerce Business Central A better way to handle prepayments	EOS Solutions      Business Central      Create and manage customized	
Progress Payment Invoicing AP Commerce Business Central A better way to handle prepayments for purchase and sales orders	EOS Solutions	
Progress Payment Invoicing AP Commerce Business Central A better way to handle prepayments	EOS Solutions Business Central Create and manage customized payment plans in Microsoft Dynamics	
Progress Payment Invoicing AP Commerce Business Central A better way to handle prepayments for purchase and sales orders	EOS Solutions Business Central Create and manage customized payment plans in Microsoft Dynamics	

### 3) Click on Buy Now.



AppSource Apps for Bus	siness Central
< Apps	
	Progress Payment Invoicing
	AP Commerce
	***** <sub>5.0 (9)</sub>
	5.0 (9)
	Overview Plans + Pricing Ratings + reviews
	A better way to handle prepayments for purchase and sales
Buy now 🛛 🗠	orders
Starts at	Discover the power of Progress Payments Invoicing within

#### 4) Click on Buy now

Apps > Progress Payment Invoicing

by AP Commerce Dynamics 36	5 Business Central	
<b>5.0</b> (9 ratings	)	
Starts at Free	Buy now	Contact me

5) Select a plan and click Next.



Apps > Progress Payment Invoicing > Checkout

#### Checkout

Plan	Select a plan	
O Price + billing	Progress Payment Invoicing	
Payment     Complete purchase	Standard Monthly Plan Free trial Description \$30 per user per month (minimum 4 users) Number of users 4-1,000,000	Price/payment options 1-month subscription • First month free, then \$30.00/user/1-month
	Next	

6) Go through the Billing information pages.

Apps	> Progress	Payment	Invoicing	>	Checkout
------	------------	---------	-----------	---	----------

# Checkout

Plan	Price + billing
	Billing term ① * 1-month subscription
Price + billing	Price/payment options ① * First month free, then \$30.00/user/1-month
O Payment	Recurring billing $^{()}$ *
	<ul> <li>On</li> </ul>
O Complete purchase	Ott
	Number of users (4-1,000,000) *
	4
	Back Next

7) Enter your payment information.



### Checkout

8)

9)

	Desidual		Defec (LIOD)	Ouestitu
	Product name		Price (USD)	Quantity
Price + billing				
	Offer	Progress Payment Invoicing	First month free, then \$30.00/ user/one-time payment	4
	Plan Billing term	Standard Monthly Plan Free trial 1-month subscription		
Payment	Recurring billing	On		
	Sold-to address *	files level solid conservation for	Billing account	ī
Complete purchase		f the legal entity responsible for ied on the invoice. The address	AP Commerce, Inc.	$\sim$
		ed to determine your tax rate.	0 Edit	
			AP Commerce, Inc.	
			12304 Santa Monica Blvd. 5 Los Angeles, CA 90025-259 US	
	Bill to *		Billing profile	]
		ofile you want to use for this	APC	$\sim$
	more about billing p	also edit an existing profile. Learn rofiles	Edit + Add new	
	Summary Subtotal after trial (I	pefore tax).		
	Estimated taxes: 0			
	IOTAI:			
	Back Pla	ce order		
	der.			
ick on the <b>Place or</b>				
ick on the <b>Place on</b> Summai	ry			
Summa	-	fore tax):		
Summan Subtotal	after trial (be	fore tax):		
Summar Subtotal	-	fore tax):		
Summan Subtotal	after trial (be	fore tax):		
Summan Subtotal Estimate	after trial (be	fore tax):		
Subtotal Estimate Total:	after trial (be ed taxes: ①			
Summan Subtotal Estimate	after trial (be ed taxes: ①	fore tax):		
Subtotal Estimate Total:	after trial (be ed taxes: ①			
Subtotal Estimate Total: Back	after trial (be ed taxes: ① Place	order	ho <b>BR</b> inger - († 205	
Subtotal Estimate Total: Back	after trial (be ed taxes: ① Place		the <b>Microsoft 365 a</b>	dmin center.
Subtotal Estimate Total: Back	after trial (be ed taxes: ① Place	order	he <b>Microsoft 365 a</b>	dmin center.

Now, assign the licenses you purchased to users in your tenant via Admin center. From there you can proceed to install this app. To manage your licenses anytime, click on your account at the top right, open Admin center and go to Licenses.

Back	Assign licenses
and the second	raangir incentaes

10) Click on the app that is just purchased.



	Microsoft 365 admin	center		O Search		0
=			Home > Licenses			
6	All tenants		Licenses			
ଜ	Home		Subscriptions Requests (1) Auto-claim policy			
8	Users	~				
6 <b>,</b> ,	Devices	~	Select a product to view and assign licenses. Each product be multiple subscriptions. Learn more about assigning licenses	elow may contain licenses f	rom	
"X"	Teams & groups	~				
	Billing	~	Go to Your products to manage billing or buy more licenses.			
ð	Setup		One or more products have more assigned licenses than available	e licenses. Unassign licenses o	r buy more licenses	
	Show all					
			Name 1	Available licenses	Assigned licenses	Account type
			S Azure Active Directory Basic	13	12/25	Organization
			Dynamics 365 Business Central for IWs	9988	12/10000	Organization
			S Dynamics 365 Customer Engagement Plan	4	11/15	Organization
			S Dynamics 365 Sales Premium Viral Trial	9990	10/10000	Organization
			ф ғ	4	······································	Organization

11) Click on Assign Licenses to assign the licenses to the users that will be using the app.

Home > Licenses > Lice	ense detalis		
			Dia
φ F			Plan
Published by A	P Commerce		
Licenses			
<b>4</b> available			
0 assigned of 4 total			
Install this product			
Users			
Manage and view licenses f	or your users.		
+ Assign licenses $\downarrow$ Ex	xport users 💍 Refresh		
Name	Email	Туре	

- 12) If you already have the app installed, you do not need to complete steps 13 through 15.
- 13) Once you have assigned your licenses, click on Install this Product to install the app in your tenant.



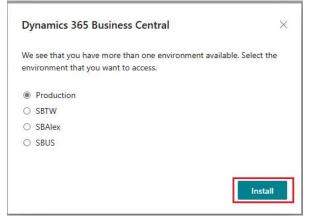


9	F
	Published by AP Commerce
Liconsor	

Licenses	
4 available	
2 3	
0 assigned of 4 total	
Install this product	1

Back to Licenses

14) Select an environment and click on Install.



15) Choose a language and click on Install.

Extension Installation		ZX
Choose language		
Language	English (United States)	***
Note: There might be other users	working in the system.	
Installing extensions during business	s hours will disrupt other users.	
After installation, your session will re	fresh, and you can set up your ext	ension.
		- Singersen 2
		Install

#### **Cancelling the Subscription**

- 1) To Cancel Subscription, open the Microsoft 365 admin center and go to Billing>>Your Products.
- 2) Click on the app you want to cancel the subscription for and click on **Cancel Subscription**.

### **Assigning Permission Sets**

1) Choose the **D** icon to enter **"User"** and click on the related link to open the **Users** list.



- 2) On the Users list, select users that will require permissions to the Installment Payment Terms app.
- On each of the selected User Cards, go to the User Permission Sets tab, add the necessary permission sets based on the role of the user:

#### a. APEPROGPMTPERMISSION

- i. This permission is needed only for users that will be creating, updating, or processing Sales or Purchase Documents with Progress Payments.
- ii. A license is required for this permission.

#### b. APEPROGPMTREAD

- i. Any user that may need to review but not update Sales or Purchase Documents.
- ii. These users do not need to be assigned a license.

#### c. APEPROGPMTTESTE

- i. A special license is available to be used to allow one account to test this app in a Sandbox.
- ii. This permission set is only for use in a Sandbox environment and cannot be assigned to any user in a Production environment

Permission Set ↑		Name	Туре ↑	Extension Name
→ <u>APEPROGPMTPERMISSION</u>	1	Progress Payment Inv. User	System	Progress Payment Invoicing
APEPROGPMTREAD		Progress Payment Inv. Read	System	Progress Payment Invoicing
APEPROGPMTTESTE		Progress Payment Inv. Test	System	Progress Payment Invoicing

#### **Progress Payment Setup**

1. Choose the icon that opens the Tell Me feature, enter "Progress Payment Setup" and click on the related link

Progress Payment Setup	
Go to Pages and Tasks	
> Progress Payment Setup	Administration
Documentation	
② Search Help for "Progress Payment Setup"	
Get from Microsoft AppSource	Show all (500

2. Define the setup that you wish to use:



	$\smile$		_	✓ Saved	
Progress Pay	ment Set	up			
* Subscription Management	More options				
General					
Check Prog. Pmt. when Posting					
Sales Progress Payments					
Sales Progress Payments Progress Payment Sales G/L Account	nt 2	2160	 	 	~
	L	2160	 		~

- a. General Group
  - i. Check Prog. Pmt. When Posting
    - 1. If this is set to true, you cannot ship or invoice an order that has an unpaid Progress Payment.
- b. Sales Progress Payments Group
  - i. Progress Payment Sales G/L Account
    - 1. Defines the G/L Account to use for Progress Payment Sales Invoices and Cr. Memos.
- c. Purchase Progress Payments Group
  - i. Progress Payment Purch. G/L Account
    - 1. Defines the G/L Account to use for Progress Payment Purchase Invoices and Cr. Memos.

# **User Guide**

 $\leftarrow$ 

# **Sales Progress Payments**

This guide provides a step-by-step process for posting a Progress Payment Invoice for Sales Orders. Be sure to assign the **APEPROGPMTPERMISSION** permission sets to the users that will be processing viewing Progress Payment Invoices. On the Sales Order Card, you will find a group called **Progress Payment**. This group has information regarding the status of any Progress Payments made for the Sales Order.



### **Progress Payment Group**

#### Progress Payment

		÷	Poste	ed Progress Docume	ents∨			
Progress Amount to Apply	0.00					Posted Document		
Progress Amount Posted	10,000.00			Posting Type		No.	Amount	Remaining Amount
r rog. oso / ano ant r ooto a	10,000.00		$\rightarrow$	Invoice	÷	103117	10,000.00	-10,000.00
Applied Progress Amount	0.00							
Remaining Progress Amount	10,000.00							
Show Line Details								

- a) Progress Amount to Apply
  - a. This field will be filled when you are posting the current sales order to allocate previously posted Progress Payment Invoices.
- b) Progress Amount Posted
  - a. The total of all Progress Payment Invoices posted for the current sales order.
- c) Applied Progress Amount
  - a. The total of all Progress Payment Applications and Progress Payment Cr. Memos posted for the current sales order.
- d) Remaining Progress Amount
  - a. The total of Progress Payment Posted minus the Applied Progress Amount
- e) Show Line Details
  - a. Mark this to true if you want the line detail of the current sales order to transfer to the Progress Payment Invoice created.
- f) Posted Progress Documents
  - a. This will show a log all Invoices, Cr. Memos, and Applications applied to the current sales order

#### **Create Progress Invoices for Sales Orders.**

1) Open the Sales Order Card and click on Actions.

Group PLC	
Print/Send Request Approval Order	Report Actions Related Automate Fewer options
The Cannon Group PLC	Due Date
The Cannon Group PLC Andy Teal	Due Date



2) Click Posting>>Progress Payment>>Post Progress Payment Invoice.

port	Actions $\lor$ Related	$\sim$	Automate $\lor$ Few	er optio	ns					
	Functions	>				Show	v more	() Details	Attachm	ents (0
	💽 Plan 🐼 Request Approval	>	1	0/27/20	23			Sell-to Cus	tomer Sales	Histo
	Posting	>	Test Report				- 1	Customer No.		
	Other	>	Progress Paym	ent >	R Post Progress Paym	ent Invoice	C	0	1	
	Status		Prepayment	>	Rest Progress Paym	ent Cr. Memo	24	Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongo Order
			Other	>		Ŕ	63	3	0	
	Location Code	Q	Qty. to Asse	mble Drder	Unit of Reserved Quantity Measure	-	nit Price	Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongo Credit
	BLUE		10	_	_ RGS		4.0	101	112	
								Posted Sales Shipments	Posted Sales Invoices	Postec

3) Enter the amount of the Progress Payment Invoice you want created.

Post Sales Progress Payme	ent	∠ ×
Options		
Progress Payment Type	Invoice	
Progress Payment Posting Date	5/1/2023	
Progress Payment Document Date	5/1/2023	Ē
Enter Progress Payment Amount		0.00
External Document No.	CUST PO 1234	
Posting Description	Prog Payment Description	
Progress Payment Terms Code	1M(8D)	$\sim$
Due Date	6/1/2023	Ē
Payment Discount %		2.00
Payment Discount Date	5/9/2023	
	Schedule OK	Cancel

- 4) Click **OK**.
- 5) The **Progress Payment** group will now show that a Progress Payment Invoice has been posted against the sales order.



.....

-

ess Posting Release Prepare	Print/Send Request Approval Order Report	Actions $\forall$ Related $\lor$ Automate $\lor$ Tever options				•
		Project Code	•	🛈 Details 🛛 🞚 Attac	hments (0)	
ia Code	ATLANTA GA	Payment Discount %	2	Sell-to Customer Sa	les History	â
		Direct Debit Mandate ID		Customer No.	10000	I
ing and Billing >			9/27/2623	0	1 20	I
gn Trade					es Organing Sales	I
			_	3	0 0	1
ress Payment			_	Organg laws Organg la Invoice Refur Orde	es Origating Sales Credit Memore	I
		Posted Progress Documents ~		102 11	3 1	L
is Amount to Apply	0.00	Posting Type Document No. Amount Part	ing brout	Partiel Sales Solgments Involves	Ported Same	
is Amount Posted	10.000.00	→ Invoice 1 103117 10.000.00	-10.000.00			
i Progress Amount	0.00			2	0 0	
ing Progress Amount	16.000.00			Porter Sales Credit Micros	CP Receivables Inverse from	
ine Details						
				Customer Details $\sim$		
ryment				Customer No.	10000	
ment %		Preprit, Payment Discount %	7		The Cannon Group FLC	
ess Prepayment		Preput, Pret Discourt Date 11/5/2823		Phone No.	310-388-9066	
				Email Fax No.	test@test.com	
t, Payment Terms Code	114(80)	Preprit, Include Tax	I	Credit Limit (S)	0.00	
ment Due Date	10/27/2023		I	Available Credit (5)	0.00	
				Payment Terms Code	114(80)	

6) You can view the Customer Ledger Entry for the posted Progress Invoice by clicking on the **Remaining Amount** field.

ted Progress Documents v       0 rigoing Sales       0 rigoing Sales       0 rigoing Sales         Posting Type       Posted       0 rigoing Sales       0 rigoing Sales       0 rigoing Sales         Posting Type       Posted       0 rigoing Sales       0 rigoing Sales       0 rigoing Sales         Imvisice       1 03117       10,000.00       10 000.00       2       0       0         pmt. Payment Discount %       10/5/2023       2       0       0       0         pmt. Include Tax       10/5/2023       10/5/2023       3 10-5388-9066       Email       test@test.com         Fax No.       10/5/2023       10/5/2023       10/5/2023       10/5/2023       10/5/2023       10/5/2023							9/27/2023	_	0	1	20
ted Progress Documents -       Posting Type       Posted Document No.       Amount       Remainting Amount       102       113       1         Posting Type       Posted Document No.       Amount       Remainting Amount       10000.00       10000.00       2       0       0         Posted Sales       103117       10,000.00       10000.00       2       0       0         Posted Sales       Gested Sales       Gested Sales       Gested Sales       Gested Sales       Receivables         pmt. Payment Discount %       10/5/2023       2       0       0       0         pmt. Pmt. Discount Date       10/5/2023       2       0       0									Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
ted Progress Documents -       Posted Document No.       Amount Remembry Amount Discount       102       113       1         Posting Type       Posted Document No.       Amount Remembry Amount Discount       10,000.00       10000.00       2       0       0         Posted Sales       103117       10,000.00       10000.00       10000.00       2       0       0         Posted Sales       GP Sales       GP Sales       GP Sales       GP Receivables       Fraisactors         pmt. Payment Discount %       10/5/2023       2       0       0       0         pmt. Pint. Discount Date       10/5/2023       10/5/2023       2       0       0000								-	3	0	0
Posting Type       Posted Document No.       Amount Amount       Remaining Amount 10000.00       Posted Sales Posted Sales       Posted Sales       <									Ongoing Sales Invoices	Origoing Sales Return Orders	Ongoing Sales Credit Memos
Posting Type       Document No.       Amount       Rementing Amount         Imvaice       103117       10,000.00       10000.00	st	ed Progress Docur	ments	e					102	113	1
2     0     0       Posted Sales     GP Sales     GP Receivables       Creat Memos     Transactions     Transactions       pmt. Payment Discount %     10/5/2023     Customer No.     10000       Name     The Cannon Group PLC     Phone No.     310-388-9066       Email     test@test.com     test@test.com		Posting Type				Amount	Remaining Amount		Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
Creat Merros     transactions       Customer Details ~       pmt. Payment Discount %     2       pmt. Pmt. Discount Date     10/5/2023	<i>→</i>	Invoice		103117		10,000.00	-10.000.00		2	0	0
pmt. Payment Discount %     Customer No.     10000       pmt. Pmt. Discount Date     10/5/2023     Phone No.     310-388-9066       Email     test@test.com									Posted Sales Credit Memos		GP Receivables transactions
pmt. Payment Discount %								ч.	Customer [	Details 🗸	
Implement Discount %         2         Phone No.         310-388-9066           Dimt. Pmt. Discount Date         10/5/2023         Email         test@test.com								.	Customer No.		100
pmt. Pmt. Discount Date		ant Darmant Disc	to unit 92					,	Name	The	Cannon Group P
								2	Phone No.		310-388-90
emt. Include Tax ····· Fax No.	rep	omt. Pmt. Discount	Date	10	/5/2023			ч I – .	Email		test@test.co
	rep	omt. Include Tax							Fax No.		

#### **Allocate Progress Payments when Invoicing Sales Orders**

To recognize the Progress Payments against your Sales Order, you must tell Business Central the amount to Allocate. You are not allowed to allocate more than the amount being invoiced and not allowed to invoice more than the amount remaining to be allocated.

Steps to allocate Progress Payments:

1) Enter the Qty. to Invoice that you will be posting for the current sales order.



		ment No.		1			Ongoing Sales Quotes
						ළ සි	3
ine Amount Excl. Tax	Amount Including Tax	Qty. to Ship	Quantity Shipped	Qty. to Invoice	Quantity Invoiced	Qty. to Ar	Ongoing Sales Invoices
34,000.00	34,000.00	1		1			102
						I	Posted Sales Shipments
						•	2
							Posted Sales Credit Memos
34.000.00	Total Excl. Tax	(USD)				34.000.00	
0.00	Total Tax (USD	)				0.00	Customer I
0	Total Incl. Tax	(USD)				34,000.00	

# 2) Enter the Progress Amount to Apply

China in and Billing	
Shipping and Billing >	
Foreign Trade	
Progress Payment	
	Posted Progress Documents ~
Progress Amount to Apply	0.04 Posting Type Document No. Am
Progress Amount Posted	10.000.00 → Invoice : 103117 10.00
Applied Progress Amount	0.00
Remaining Progress Amount	10.000.00
Remaining Progress Prinouni	
Show Line Details	

3) Click Posting>>Post...



← Sales Order	Ø
1059 · The Cannon Group PLC	
Process Posting Release Prepare Print/Send Request Approval O	
Payment Terms Code	→ Department Code
Tax Liable	Project Code
Tax Area Code ATLANTA, GA	V Payment Discount S
	Direct Debit Manda

4) Select the posting type you will be performing, either Invoice or Ship and Invoice and click OK

		Proje	ct Code			
ATLANTA, GA	~	Payn	nent Discount %		****	
		Direc	t Debit Mandate	ID ····		
	(	) O Shi O Inv Shi			ОК	Cancel
		Post	ed Progress Docu	ments	í.	
	3.400.00		Posting Type		Posted Document No.	Amount
	10,000.00	$\rightarrow$	Invoice	1	103117	10,000.00
	0.00					

5) Once the invoice is applied, the Posted Progress Documents will show a log of the Application amount.



	Post	ed Progress Doci	uments	~			
0.00		Posting Type		Posted Document No.	Amount	Remaining Amount	Posted Credit M
00.000	$\rightarrow$	Invoice	1	103117	10.000.00	-10.000.00	_
400.00		Application	1	103118	-3.400.00	0.00	Custo
500.00							
							Custom
							Name
							Phone
							Email

6) The Remaining Progress Amount will now be updated

#### **Progress Payment**

		Post	ed Progress
Progress Amount to Apply	0.00		
Progress Amount Posted	10,000.00		Posting Typ
			Invoice
Applied Progress Amount	-3,400.00	$\rightarrow$	Applicatic
Remaining Progress Amount	6,600.00		
Show Line Details			

7) You will see the Customer Progress Payment recognized on the lines of the corresponding Posted Sales Invoice

Туре	No.	Item Reference No.	Description	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax A
ltem	1000		Bicycle	1	PCS	4,000.00	ATLA
G/L Account	22160		Customer Progress Payment	-1		3,400.00	ATLA

### **Find Progress Payment Documents**

Do the following to find related Progress Payment Invoices

1) Click Related>>Progress Payment>Progress Payment Invoices

					φ	AP Commerce In Less talk. More results. www.apcommerce.com
	V 3/				1118411	
		Ø 🖻	+			
Report	Actions $\sim$	Related $\lor$ Automa	te $\vee$	Fewer options		
		Drder	>		Show more	① Detai
	Due Dat	Progress Payment	>	Ell Progress Payment Invoices		Sell-to
		warehouse	>	🖼 Progress Payment Cr. Memos		
	Request	Prepayment	>			Customer
	External	History	5	2		
<u> </u>	Status	History	1	Open		
						Ongoing S Quotes
					is e	

# 2) Open the Posted Sales Invoice

		Dynan	nics 365 Business Central	50///		"PP				R]//	
Views     X     No.     Customer No.     Customer Name     Customer Name       All     :     103117     :     102000     The Cannon Group PLC       Unpaid     Paid       Canceled       Filter list by:       × Progress Pmt Order No.		$\leftarrow$	Posted Sales Invoices								
All : Unpaid Paid Canceled Filter list by: × Progress Pmt Order No. The Cannon Group PLC The Cannon Group PLC	1		Posted Sales Invoices: All $\lor$		Manage	Process	Print/Send	Invoice	Correct	Actions	V A
Unpaid Paid Canceled Filter list by: × Progress Pmt Order No.			Views	×	No.	C	ustomer No.	Customer	Name		Curre
Paid Canceled Filter list by: × Progress Pmt Order No.			All	:	103117	: 10	0.0.0.0	The Can	non Group	PLC	
Canceled Filter list by: × Progress Pmt Order No.			Unpaid								
Filter list by: × Progress Pmt Order No.			Paid								
× Progress Pmt Order No.			Canceled								
			Filter list by:								
1059			× Progress Pmt Order No.								
			1059								

3) The Progress Payment will in the Lines section of the Posted Sales invoice



=	Dynar	mics 365 Business Centr	ral		Ppp			
	$\leftarrow$	Posted Sales Invoices						
		Posted Sales Invoices:	All ∼   ,2 s	earch Manage	Process	Print/Send	Invoice Correct	Actions V Au
U		Views	×	No.	C	ustomer No.	Customer Name	Currer
		All		103117	: 10	0,0,0,0	The Cannon Group	PLC
		Unpaid						
		Paid						
		Canceled						
		Filter list by:						
		× Progress Pmt Order No.						
		1059						
		+ Filter						

# **Purchase Progress Payments**

This guide provides a step-by-step process for posting a Progress Payment Invoice for Purchase Orders. Be sure to assign the **APEPROGPMTPERMISSION** permission sets to the users that will be processing viewing Progress Payment Invoices. On the Purchase Order Card, you will find a group called **Progress Payment**. This group has information regarding the status of any Progress Payments made for the Purchase Order.

#### **Progress Payment Group**

**Progress Payment** 

		Pos	ted Progress Docu	ments	~		
Progress Amount to Apply	0.00		Posting Type		Posted Document No.	Amount	Document Remaining Amount
Applied Progress Amount	0.00	$\rightarrow$	Invoice	:	200048	10,000.00	10,000.00
Remaining Progress Amount	10.000.00						
Show Line Details							

- g) Progress Amount to Apply
  - a. This field will be filled when you are posting the current Purchase order to allocate previously posted Progress Payment Invoices.
- h) Progress Amount Posted
  - a. The total of all Progress Payment Invoices posted for the current Purchase order.
- i) Applied Progress Amount
  - a. The total of all Progress Payment Applications and Progress Payment Cr. Memos posted for the current Purchase



order.

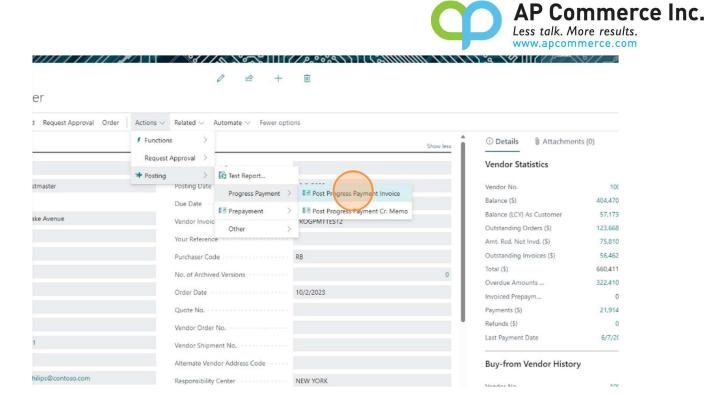
- j) Remaining Progress Amount
  - a. The total of Progress Payment Posted minus the Applied Progress Amount
- k) Show Line Details
  - a. Mark this to true if you want the line detail of the current Purchase order to transfer to the Progress Payment Invoice created.
- I) Posted Progress Documents
  - a. This will show a log all Invoices, Cr. Memos, and Applications applied to the current Purchase order

### **Create Progress Invoices for Purchase Orders.**

7) Open the Purchase Order Card and click on Actions.

s Central			
		0 v +	Î
London Pos	stmaster		
g Release Prepare	Print/Send Request Approval Order Actions	Related V Automate V Fewer option	ons
	10000	Invoice Received Date	
	10000	Invoice Received Date	
	London Postmaster	Posting Date	10/2/2023
		Due Date	10/31/2023
	10 North Lake Avenue	Vendor Invoice No.	PROGPMTTEST2
		Your Reference	
	Atlanta	Purchaser Code	RB
	GA	No. of Archived Versions	
	31772	Order Date	10/2/2023

8) Click Posting>>Progress Payment>>Post Progress Payment Invoice.



9) Enter the amount of the Progress Payment Invoice you want created.

Invoice	
5/1/2023	
5/1/2023	
	0.00
INV 1234	
My Progress Payment Posting Desc	
СМ	$\sim$
5/31/2023	
	0.00
5/1/2023	Ē
	5/1/2023 5/1/2023 INV 1234 My Progress Payment Posting Desc CM 5/31/2023

- 10) Click **OK**.
- 11) The Progress Payment group will now show that a Progress Payment Invoice has been posted against the Purchase order.



## 099 · London Postmaster

ess Posting Release Prepare	Print/Send Request Approval O	rder Actions $\lor$	Relat	ed 🗸 🛛 Automa	ite 🗸 🛛 I	Fewer options		
tal Excl. Tax (USD)		105.178.50	Total	Excl. Tax (USD)				105.178.50
scount Amount (USD)		0.00	Total	Tax (USD)				0.00
e Discount % · · · · · · · · [		0	Total	Incl. Tax (USD)				105.178.50
ice Details >								CM
ping and Payment>							 	DLUE
ress Payment								
			Poste	ed Progress Doc	uments ~			
ess Amount to Apply		0.00		Posting Type		Posted Document No.	Amount	Document Remaining Amount
ess Payment Amount		10.000.00	$\rightarrow$	Invoice	:	200050	10.000.00	10.000.00
id Progress Amount		0.00		IIIIKIKK				
ning Progress Amount		10,000.00						
Line Details								

12) You can view the Vendor Ledger Entry for the posted Progress Invoice by clicking on the Remaining Amount field.

Posting Type	Posted Document No.	Amount	Remaining Amoun
→ Invoice	103117	10,000.00	-10,000.0

#### Allocate Progress Payments when Invoicing Purchase Orders

To recognize the Progress Payments against your Purchase Order, you must tell Business Central the amount to Allocate. You are not allowed to allocate more than the amount being invoiced and not allowed to invoice more than the amount remaining to be allocated.

Steps to allocate Progress Payments:

8) Enter the Qty. to Invoice that you will be posting for the current Purchase order.



			Status				Open			
r options										
scount %	Line Amount Excl. Tax	Qty. to Receive	Quantity Received		hvoice		uantity nvoiced	Qty.	to Assign	
	105,178.50	100			100				0	
		105,178.50	Total Excl. Tax	< (USD)	-					
		0.00	Total Tay (US	וח						
		unt to Apply	,							
inter the	Progress Amo									
nter the	Progress Amo									
		,,,,,,,, .								
	and Payment >									
Shipping	g and Payment >									
Shipping						Posto	d Decerces C			
Shipping Progress	g and Payment >			)	0.00	Poste	d Progress D	ocuments		
Shipping Progress	g and Payment>			)	0.00	Poster	d Progress D Posting Type	)ocuments	s~ Poster Docur	
Shipping Progress Progress Ar Progress Pa	g and Payment >			)				Documents	Poster	
Shipping Progress Ar Progress Pa Applied Pro	g and Payment > F Payment mount to Apply ayment Amount ogress Amount				0,000.00		Posting Type	Documents	Poster Docur	
Shipping Progress Progress Ar Progress Pa Applied Pro Remaining	g and Payment > F Payment mount to Apply ayment Amount progress Amount				0,000.00		Posting Type	Documents :	Poster Docur	
Shipping Progress Progress Ar Progress Pa Applied Pro Remaining	g and Payment > F Payment mount to Apply ayment Amount ogress Amount				0,000.00		Posting Type	Documents	Poster Docur	
Shipping Progress Progress Ar Progress Pa Applied Pro Remaining	g and Payment > F Payment mount to Apply ayment Amount progress Amount				0,000.00		Posting Type	Documents	Poster Docur	
Shipping Progress Ar Progress Pa Applied Pro Remaining Show Line	g and Payment > F Payment mount to Apply ayment Amount progress Amount				0,000.00		Posting Type	Documents	Poster Docur	
Shipping Progress Progress Ar Progress Pa Applied Pro Remaining Show Line I	g and Payment > F Payment mount to Apply ayment Amount progress Amount Progress Amount Details ting>>Post				0,000.00		Posting Type	Documents	Poster Docur	
Shipping Progress Progress Ar Progress Pa Applied Pro Remaining Show Line I	g and Payment > F Payment mount to Apply ayment Amount progress Amount Progress Amount Details				0,000.00		Posting Type	Documents	Poster Docur	
Shipping Progress Ar Progress Pa Applied Pro Remaining Show Line I Click Post	g and Payment > F Payment mount to Apply ayment Amount ogress Amount Progress Amount Details ting>>Post g and Payment >				0,000.00		Posting Type	Documents	Poster Docur	
Shipping Progress Ar Progress Pa Applied Pro Remaining Show Line I Click Post	g and Payment > F Payment mount to Apply ayment Amount progress Amount Progress Amount Details ting>>Post				0,000.00		Posting Type	Documents	Poster Docur	
Shipping Progress Ar Progress Pa Applied Pro Remaining Show Line I Click Post	g and Payment > F Payment mount to Apply ayment Amount ogress Amount Progress Amount Details ting>>Post g and Payment >				0,000.00	→	Posting Type		Poster Docur 2000	
Shipping Progress Ar Progress Pa Applied Pro Remaining Show Line I Click Post Shipping Progress	g and Payment > F Payment mount to Apply ayment Amount ogress Amount Progress Amount Details ting>>Post g and Payment >				0,000.00	→	Posting Type Invoice	ress Docu	Poster Docur 2000	Poster
Shipping Progress Ar Progress Ar Progress Pa Applied Pro Remaining Show Line I Click Post Shipping Progress A	g and Payment > F Payment mount to Apply ayment Amount ogress Amount Progress Amount Details ting>>Post g and Payment s Payment				0,000.00	→	Posting Type Invoice Posted Prog Posting	ress Docu Type	Poster Docur 2000 ments ~	Docur
Shipping Progress Ar Progress Ar Progress Pa Applied Pro Remaining Show Line I Click Post Shipping Progress A Progress A Progress P	g and Payment > F Payment mount to Apply ayment Amount ogress Amount Progress Amount Details ting>>Post g and Payment s Payment mount to Apply				0.000.00	→ I	Posting Type Invoice	ress Docu Type	Poster Docur 2000 ments ~	

11) Select the posting type you will be performing, either Invoice or Receive and Invoice and click OK



105,178.50	Total Excl. Tax (USD)			105,178.50
0.00	Total Tax (USD)			0.00
(i	Receive			105,178.50
	Invoice     Iteceive and Invoice	e	-	СМ
		ОК	Cancel	BLUE
3,000.00	Posted Progress Doc Posting Type	Posted Document	Amount	Document Remaining
10,000.00	→ Invoice	No.	10.000.00	Amount 10.000.00

12) Once the invoice is applied, the Posted Progress Documents will show a log of the Application amount.

Shipping and Payment >

BUE

			Poste	d Progress Docu	ments	1			
Progress Amount to Apply		0.00		Posting Type		Posted Document	No.	Amount	Document Remaining Amount
Progress Payment Amount		10.000.00	$\rightarrow$	Invoice		200050		10.000.00	10,000.00
Applied Progress Amount		-3,000.00		Application		200051		-3,000.00	0.00
Remaining Progress Amount		7.000.00							
Show Line Details									
	•								
Show Line Details Prepayment Prepayment %	•	0	Prep	nt. Payment Disc	ount %				
Prepayment Prepayment %	•	0		nt. Payment Disc nt. Pmt. Discount			10/2/2023		
Prepayment		0	Prep		Date				

13) The Remaining Progress Amount will now be updated



Progress Payment			
		Post	ed Progress Documen
Progress Amount to Apply	0.00		
Progress Payment Amount	10,000.00		Posting Type
Applied Progress Amount	-3,000.00	$\rightarrow$	Invoice Application
Remaining Progress Amount	7,000.00		repression
Show Line Details			

#### 14) You will see the Customer Progress Payment recognized on the lines of the corresponding Posted Purchase Invoice

Туре		No.	Item Reference No.	Description	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Unit Price (\$)	Tax Area Code	Tax Co
<u>ltem</u>	- 1	1000		Bicycle	100	PCS	350.595	4,000.00		
G/L Account		13510		Vendor Progress Payment	-1		3,000.00	0.00		N

### **Find Progress Payment Documents**

Do the following to find related Progress Payment Invoices

4) Click Related>>Progress Payment>Progress Payment Invoices

$\left\{ \right\} \right\} $		
ctions $\lor$	Related V Automate V Fewer options	
	Progress Payment > 🕮 Progress Paymen Invoices	Show less
	Warehouse > 📳 Progress Payment Cr. Memos	
$\sim$	Invoice Received Date	Ē
	Posting Date	
	Due Date	Ē
	Vendor Invoice No. PMTTEST1234V1	
	Your Reference	
	Purchaser Code · · · · · · · RB	~

5) Open the Posted Purchase Invoice

Posted Purchase Invoices						
✓ Search Manage Process	Print/Send	Correct	Invoice	Report	More options	
Views	×	No.		Vendor Invoice No.	Vendor No.	Vendor
All	:	200050	÷	PMTTEST12	. 10000	London Po
Filter list by: × Progress Pmt Order No.						
106099						
+ Filter						

6) The Progress Payment will be listed in the Lines section of the Posted Purchase invoice

Lines Manage Line Fewer	r option	ns No.	Item Reference No.	Description	Quant	Unit of ity Measure Code	Direct Unit Cost Excl. Tax
Lines Manage Line Fewer	option	ns					
Contact · · · · · · · · · · · · · · · · · · ·	M	Irs. Carol Phili	ips		Corrective		No
mail · · · · · · · · · · · · · · · · · · ·	m	rs.carol.philip	os@contoso.cor	n	Canceled · · · · ·		No
Aobile Phone No.					Responsibility Cen	ter	NEW YORK
Phone No.	42	255550101			Purchaser Code		RB
Contact No.	CT	T000129			Order Address Cor	de ·····	
ountry/Region	US	S			No. Printed		
IP Code	31	1772			Pre-Assigned No.		2023
tate	G	A.			Vendor Order No.		

# FAQ

### What No. Series are used when processing Progress Payment Invoices?

The Progress Payment Invoicing process uses the Posting No. Series set up in the corresponding Sales & Receivables Setup and Purchase & Payables Setup pages.

AP Commerce Inc.



#### I made a Progress Payment Invoice for too much, what should I do?

If you posted too much with a Progress Payment Invoice, you should post a Progress Payment Cr. Memo by clicking on

Posting>>Progress Payment>>Post Progress Payment Cr. Memo. You will be prompted to enter an amount to credit (the steps are like creating a Progress Payment Invoice), you can either enter the amount to bring the total Progress Payment amount to the correct amount or enter the full amount of the incorrect Progress Payment amount. Either of these choices will be shown in the Progress Payment Documents list and will reduce the Remaining Progress Amount.

#### Can I post several Progress Payment Invoices for an order?

Yes, you can post as many Progress Payment Invoices as you need as long as you do not go over the Order total amount.

#### Do I need to apply payments against the Progress Payment Invoices?

Only if you mark the Check Prog. Pmt. When Posting field on Progress Payment Setup page to true.

#### Do I have to post my shipment or receipt before I post a Progress Payment Invoice?

No! You are able to post Progress Payment Invoices at any point during you're A/R and A/P process.