

Progress Payment Invoicing User Manual

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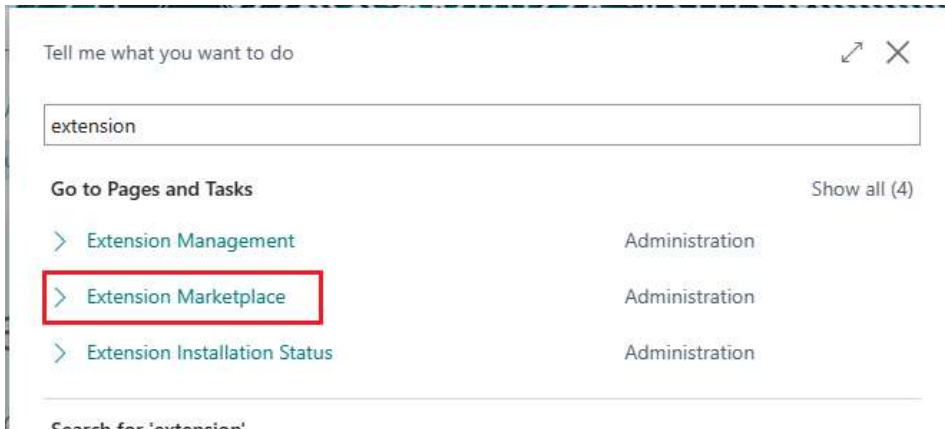
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Setup

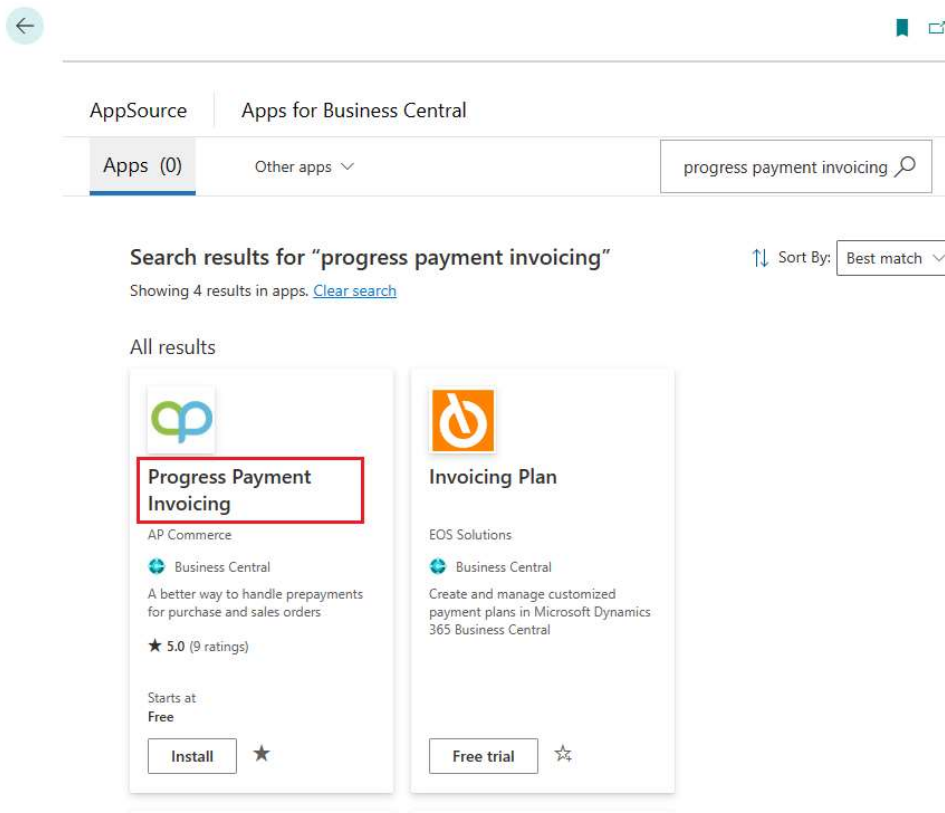
The Progress Payment Invoicing app is installed and setup per company. When using this app with different companies, you must follow the following instructions in each company. Note that you must be a Global Administrator in order to install and purchase the app.

Subscription Setup – Purchase your license

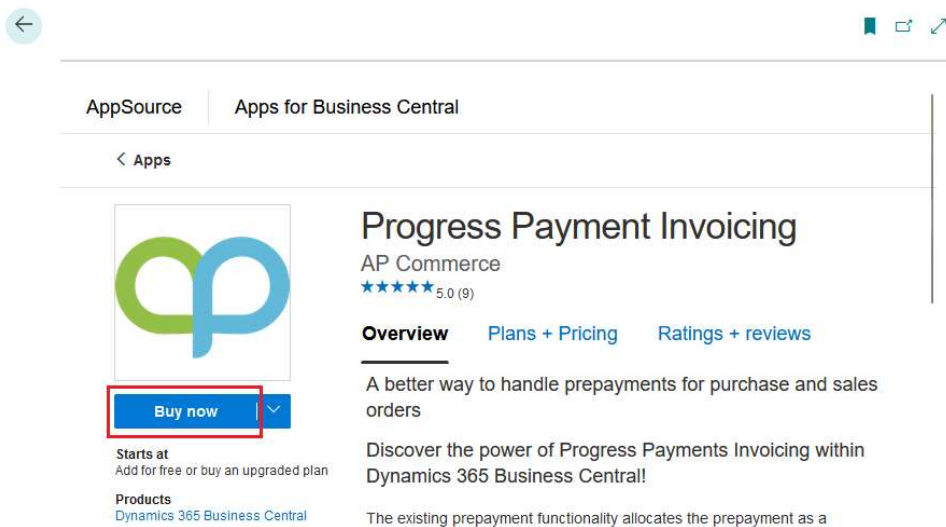
- 1) Open the Extension Marketplace



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




3) Click on **Buy Now**.



AppSource | Apps for Business Central

< Apps



Progress Payment Invoicing
AP Commerce
★★★★★ 5.0 (9)

Overview | [Plans + Pricing](#) | [Ratings + reviews](#)

A better way to handle prepayments for purchase and sales orders

Discover the power of Progress Payments Invoicing within Dynamics 365 Business Central!

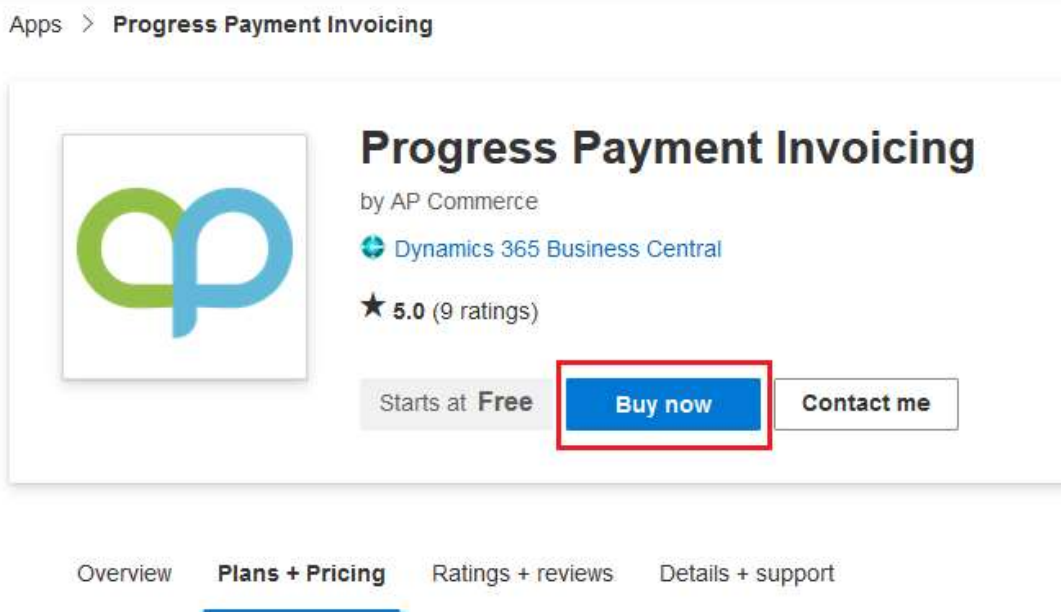
The existing prepayment functionality allocates the prepayment as a

Buy now


Starts at
Add for free or buy an upgraded plan

Products
Dynamics 365 Business Central

4) Click on **Buy now**



Apps > **Progress Payment Invoicing**



Progress Payment Invoicing
by AP Commerce
Dynamics 365 Business Central
★ 5.0 (9 ratings)

Starts at **Free** | **Buy now** | [Contact me](#)

[Overview](#) | **[Plans + Pricing](#)** | [Ratings + reviews](#) | [Details + support](#)


5) Select a plan and click **Next**.

Apps > Progress Payment Invoicing > **Checkout**

Checkout

- Plan
- Price + billing
- Payment
- Complete purchase

Select a plan

 **Progress Payment Invoicing**

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**
- Payment
- Complete purchase

Price + billing

Billing term ⓘ *

1-month subscription

Price/payment options ⓘ *

First month free, then \$30.00/user/1-month

Recurring billing ⓘ *

On

Off

Number of users (4-1,000,000) *

[Back](#)

[Next](#)

7) Enter your payment information.

Checkout

- Plan
- Price + billing
- Payment**
- Complete purchase

Payment

Product name	Price (USD)	Quantity
Offer: Progress Payment Invoicing Plan: Standard Monthly Plan Free trial Billing term: 1-month subscription Recurring billing: On	First month free, then \$30.00/ user/one-time payment	4

Sold-to address *
Enter the address of the legal entity responsible for payment and identified on the invoice. The address provided here is used to determine your tax rate.

Billing account

AP Commerce, Inc.
▼

[Edit](#)

AP Commerce, Inc.
12304 Santa Monica Blvd. STE 300
Los Angeles, CA 90025-2593
US

Bill to *

Select the billing profile you want to use for this purchase. You can also edit an existing profile. [Learn more about billing profiles](#)

Billing profile

APC
▼

[Edit](#) + [Add new](#)

Summary

Subtotal after trial (before tax):
Estimated taxes: ⓘ
Total:

Back
Place order

8) Click on the **Place order**.

Summary

Subtotal after trial (before tax):
Estimated taxes: ⓘ
Total:

Back

Place order

9) After you place your order, click on **Assign license** to open the **Microsoft 365 admin center**.

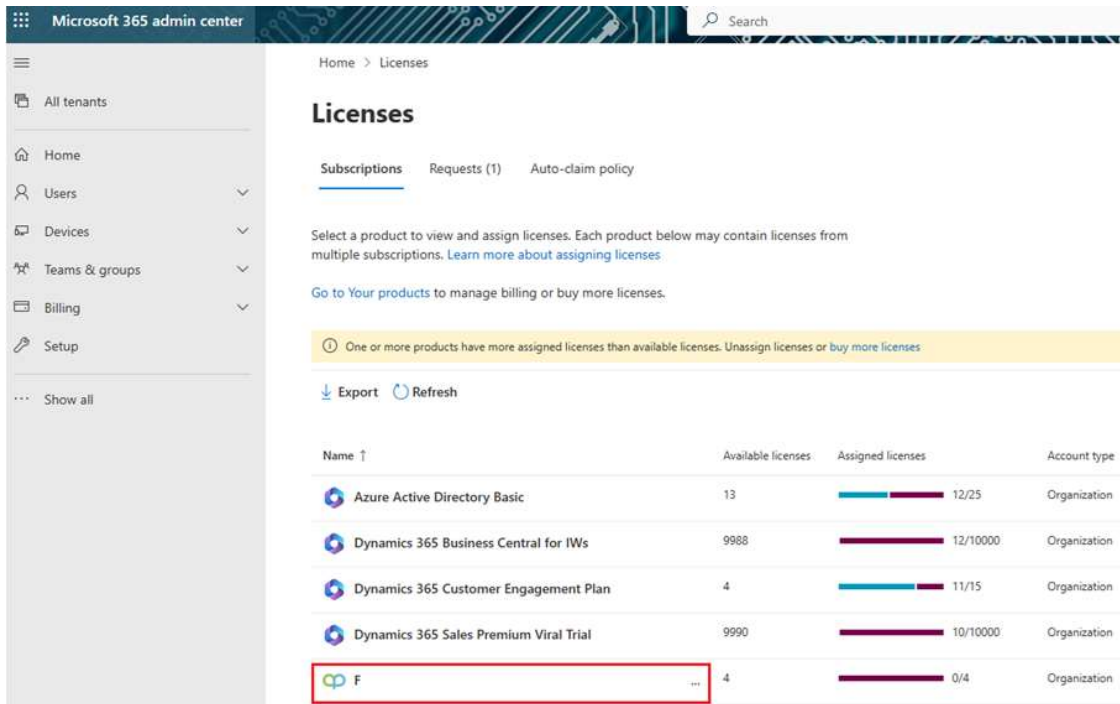
Next steps

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

10) Click on the app that is just purchased.



Microsoft 365 admin center

Home > Licenses

Licenses

Subscriptions Requests (1) Auto-claim policy

Select a product to view and assign licenses. Each product below may contain licenses from multiple subscriptions. [Learn more about assigning licenses](#).

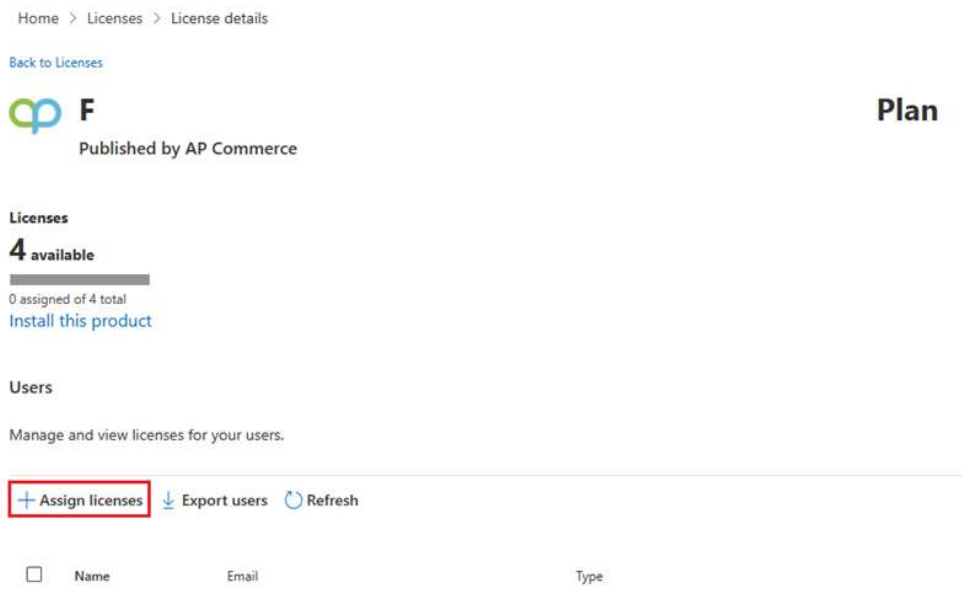
[Go to Your products](#) to manage billing or buy more licenses.

One or more products have more assigned licenses than available licenses. [Unassign licenses or buy more licenses](#)

[Export](#) [Refresh](#)

Name ↑	Available licenses	Assigned licenses	Account type
Azure Active Directory Basic	13	12/25	Organization
Dynamics 365 Business Central for IWs	9988	12/10000	Organization
Dynamics 365 Customer Engagement Plan	4	11/15	Organization
Dynamics 365 Sales Premium Viral Trial	9990	10/10000	Organization
F ...	4	0/4	Organization

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



Home > Licenses > License details

[Back to Licenses](#)

F
Published by AP Commerce

Plan

Licenses
4 available
0 assigned of 4 total
[Install this product](#)

Users
Manage and view licenses for your users.

[+ Assign licenses](#) [Export users](#) [Refresh](#)

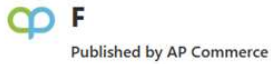
<input type="checkbox"/>	Name	Email	Type
--------------------------	------	-------	------

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.

Home > Licenses > License details

[Back to Licenses](#)



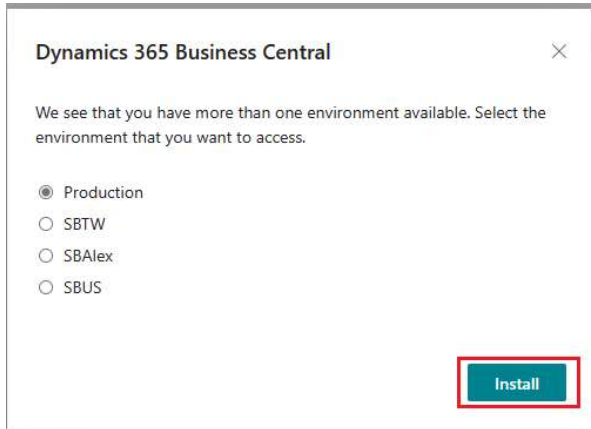
Licenses

4 available

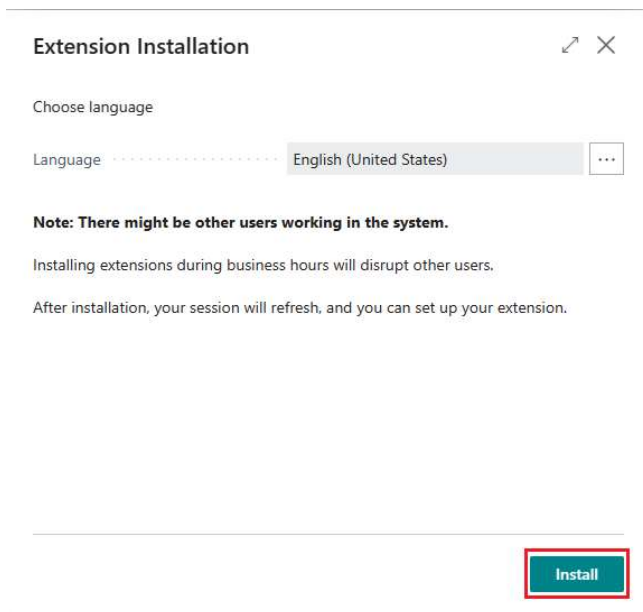
0 assigned of 4 total

[Install this product](#)

14) Select an environment and click on **Install**.




15) Choose a language and click on **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

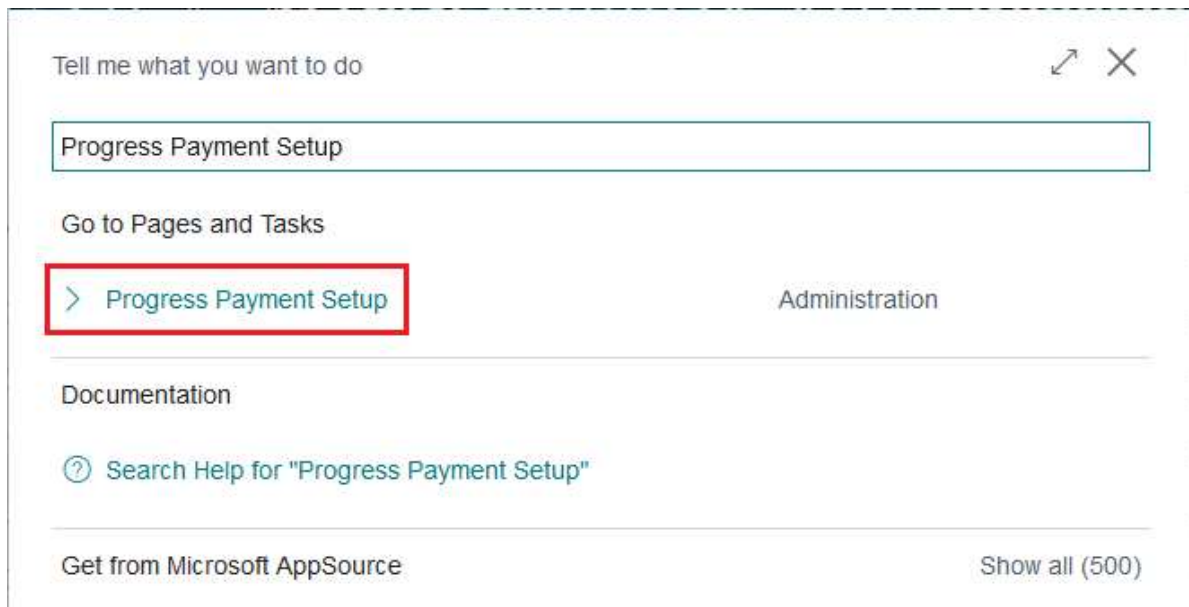
- 1) Choose the  icon to enter **"User"** and click on the related link to open the **Users** list.

- 2) On the Users list, select users that will require permissions to the Installment Payment Terms app.
- 3) 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	Type ↑	Extension Name
→ APEPROGPMTPERMISSION	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



Tell me what you want to do

Progress Payment Setup

Go to Pages and Tasks







> Progress Payment Setup Administration

Documentation

🔍 Search Help for "Progress Payment Setup"

Get from Microsoft AppSource Show all (500)

2. Define the setup that you wish to use:

←   +  ✓ Saved   

Progress Payment Setup

 Subscription Management | More options

General

Check Prog. Pmt. when Posting

Sales Progress Payments

Progress Payment Sales G/L Account

Purchase Progress Payments

Progress Payment Purch. G/L Account

- 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

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

Progress Amount to Apply

Progress Amount Posted 10,000.00

Applied Progress Amount 0.00

Remaining Progress Amount 10,000.00

Show Line Details

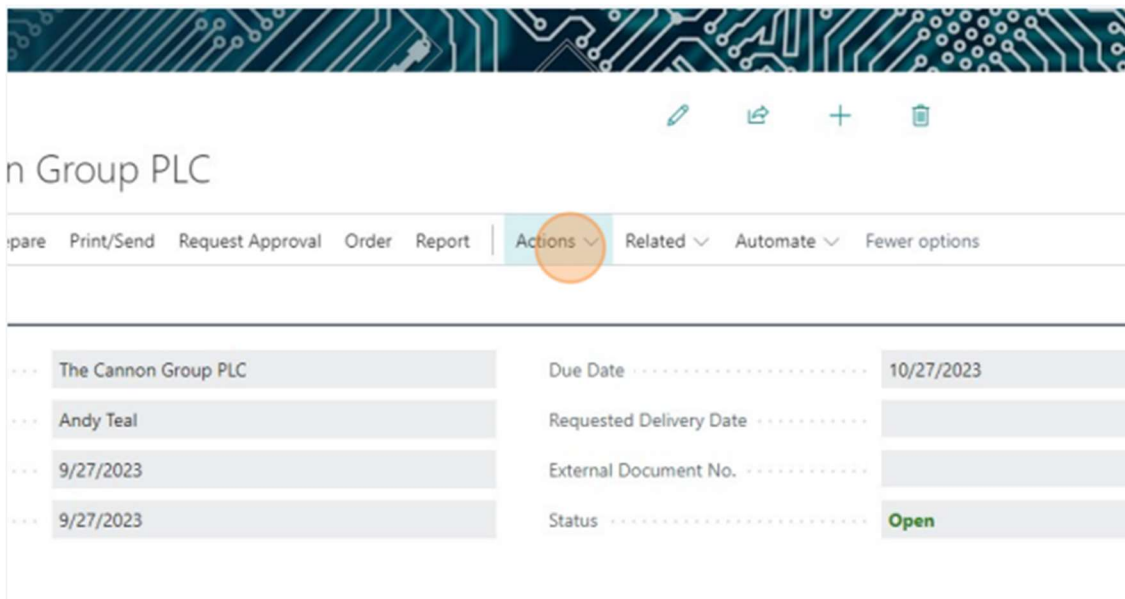
Posted Progress Documents

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

- 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.

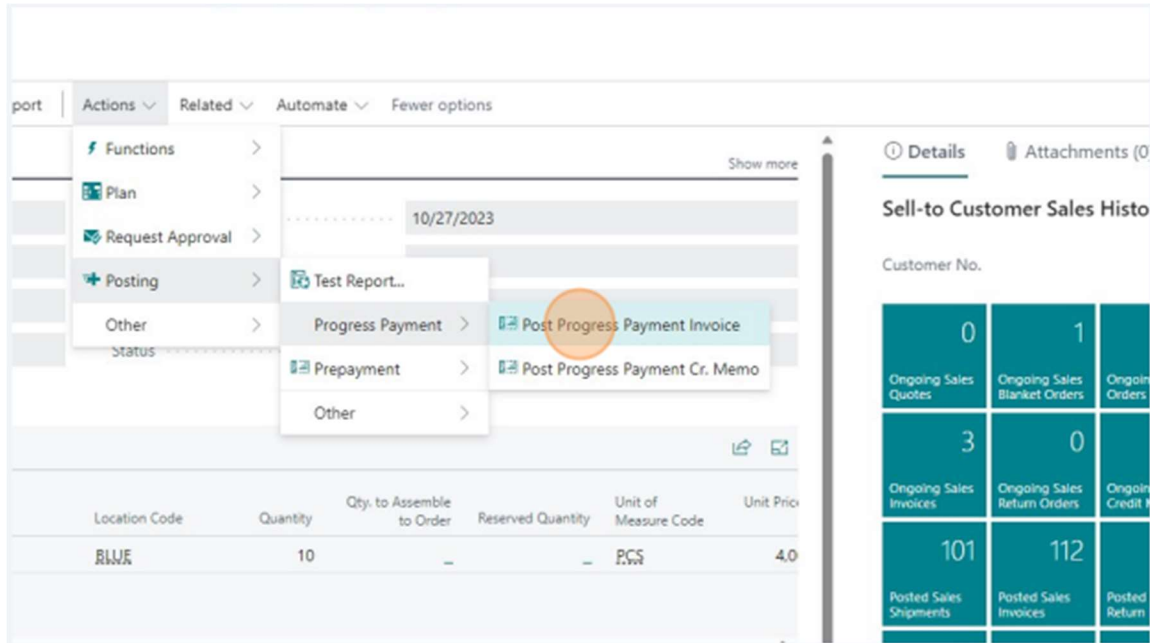
- 1) Open the Sales Order Card and click on **Actions**.



The screenshot shows a sales order card for 'The Cannon Group PLC'. The card includes a header with the company name and a toolbar with icons for edit, share, add, and delete. Below the header is a navigation bar with options: 'Prepare', 'Print/Send', 'Request Approval', 'Order', 'Report', 'Actions' (highlighted with an orange circle), 'Related', 'Automate', and 'Fewer options'. The main content area displays order details in a table format:

The Cannon Group PLC	Due Date	10/27/2023
Andy Teal	Requested Delivery Date	
9/27/2023	External Document No.	
9/27/2023	Status	Open

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



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

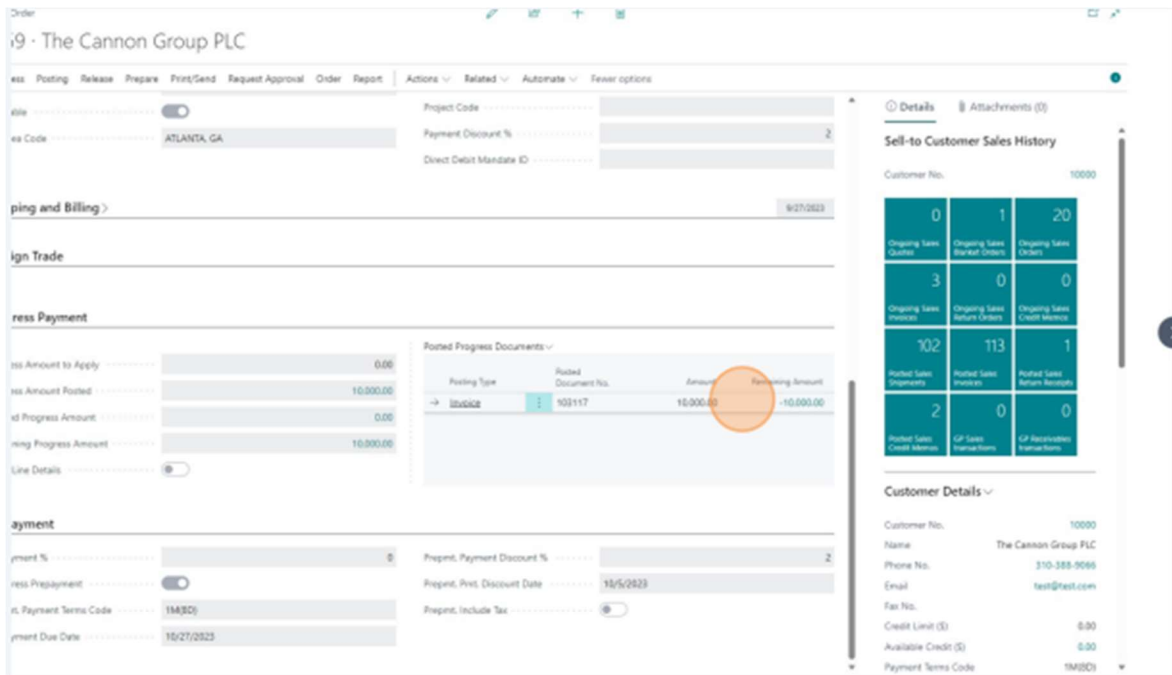
Post Sales Progress Payment ↗ ✕

Options

Progress Payment Type	Invoice
Progress Payment Posting Date	5/1/2023
Progress Payment Document Date	5/1/2023
Enter Progress Payment Amount	0.00
External Document No.	CUST PO 1234
Posting Description	Prog Payment Description
Progress Payment Terms Code	1M(8D)
Due Date	6/1/2023
Payment Discount %	2.00
Payment Discount Date	5/9/2023

4) Click **OK**.

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



Order: 19 - The Cannon Group PLC

Project Code: ATLANTA, GA

Payment Discount %: 2

Direct Debit Mandate ID:

Posting and Billing: 9/27/2023

Sign Trade

Prepayment

Invoice Amount to Apply: 0.00

Invoice Amount Posted: 10,000.00

Allocated Progress Amount: 0.00

Remaining Progress Amount: 10,000.00

Line Details:

Prepayment

Prepayment %: 0

Prepayment Payment Discount %: 2

Prepayment Prepayment:

Prepayment Prepayment Discount Date: 10/5/2023

Prepayment Payment Terms Code: 1M80

Prepayment Due Date: 10/27/2023

Posted Progress Documents:

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

Customer Details:

Customer No.: 10000

Name: The Cannon Group PLC

Phone No.: 310-388-9066

Email: test@test.com

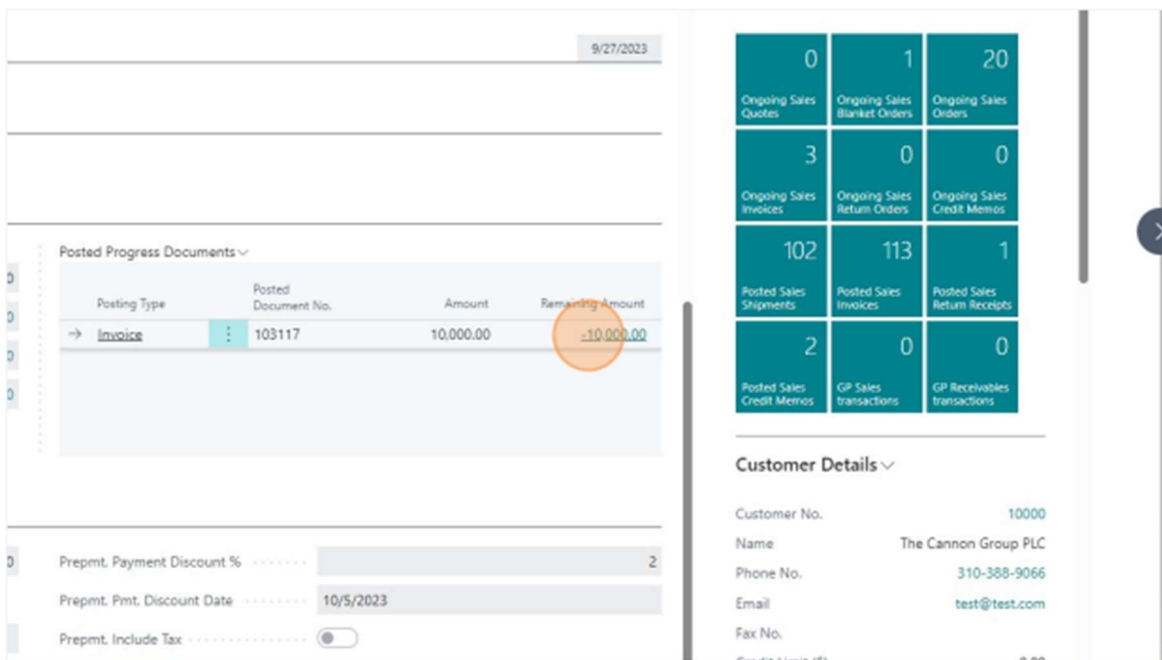
Fax No.:

Credit Limit (\$): 0.00

Available Credit (\$): 0.00

Payment Terms Code: 1M80

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



9/27/2023

Posted Progress Documents:

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

Customer Details:

Customer No.: 10000

Name: The Cannon Group PLC

Phone No.: 310-388-9066

Email: test@test.com

Fax No.:

Credit Limit (\$): 0.00

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.

External Document No.						
Status	Open					

Line Amount Excl. Tax	Amount Including Tax	Qty. to Ship	Quantity Shipped	Qty. to Invoice	Quantity Invoiced	Qty. to At
34,000.00	34,000.00	1		1		
34,000.00 Total Excl. Tax (USD)						34,000.00
0.00 Total Tax (USD)						0.00
0 Total Incl. Tax (USD)						34,000.00

Ongoing Sales Quotes	0
Ongoing Sales Invoices	3
Posted Sales Shipments	102
Posted Sales Credit Memos	2

Customer I

2) Enter the **Progress Amount to Apply**

Direct Debit Mandate ID

Shipping and Billing >

Foreign Trade

Progress Payment

Progress Amount to Apply

Progress Amount Posted 10,000.00

Applied Progress Amount 0.00

Remaining Progress Amount 10,000.00

Show Line Details

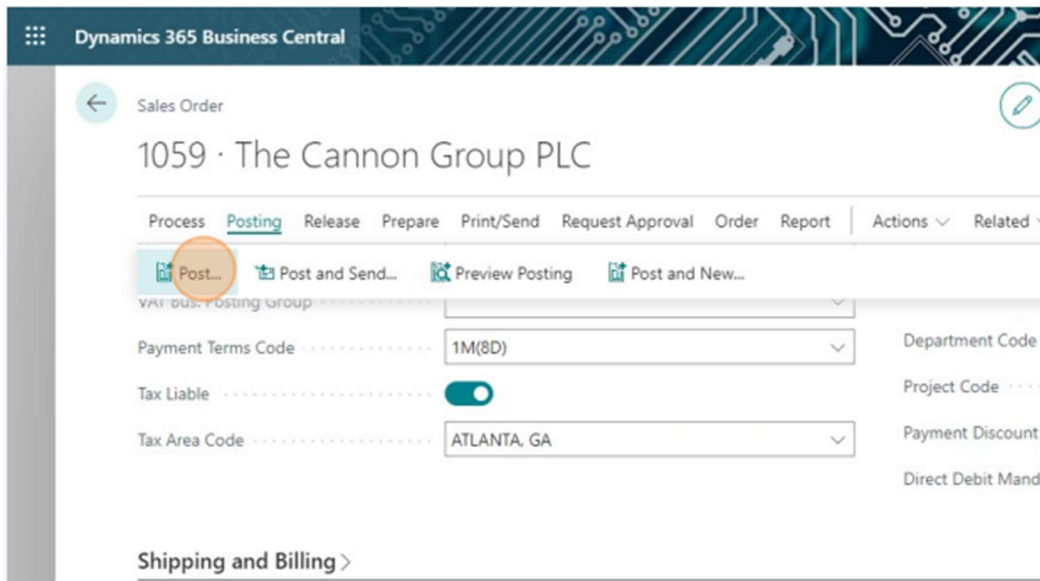
Prepayment

Prepayment % Prepmnt. Payment Discount %

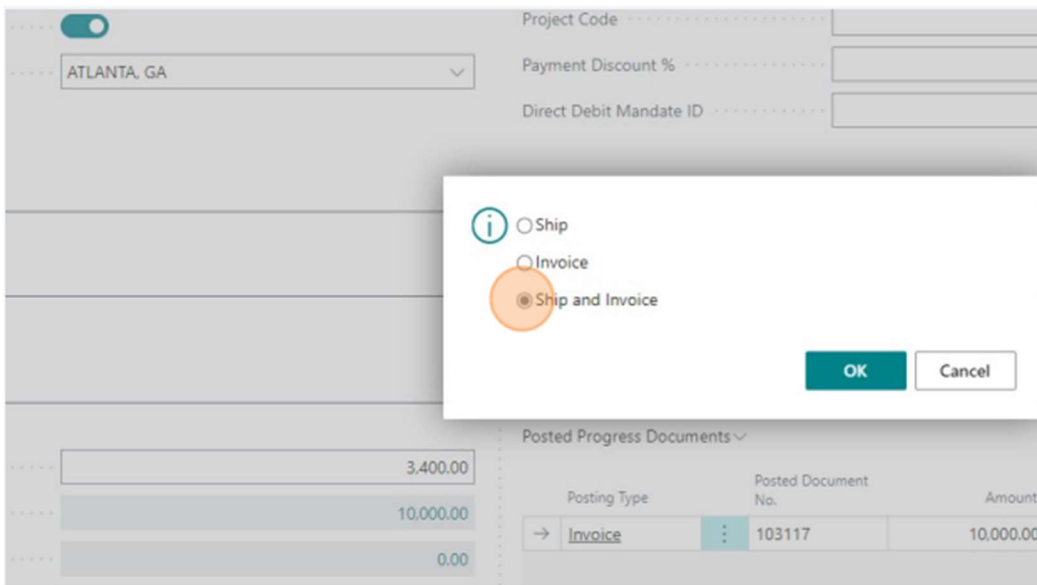
Posted Progress Documents

Posting Type	Posted Document No.	Amount
→ Invoice	103117	10,000.00

3) Click **Posting>>Post...**



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



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



103
Posted Sales Shipments

2
Posted Sales Credit Memos

Customer

Customer No
Name
Phone No.
Email
Fax No.
Credit Limit (C
Available Cre

Posted Progress Documents

	Posting Type	Posted Document No.	Amount	Remaining Amount
0.00				
10,000.00	→ Invoice	103117	10,000.00	-10,000.00
-3,400.00	Application	103118	-3,400.00	0.00
6,600.00				

0 Prepm. Payment Discount % 2

Prepm. Pmt. Discount Date 10/5/2023

6) The Remaining Progress Amount will now be updated

Progress Payment

Progress Amount to Apply 0.00

Progress Amount Posted 10,000.00

Applied Progress Amount -3,400.00

Remaining Progress Amount 6,600.00

Show Line Details

Posted Progress

Posting Typ

Invoice

→ Applicatic

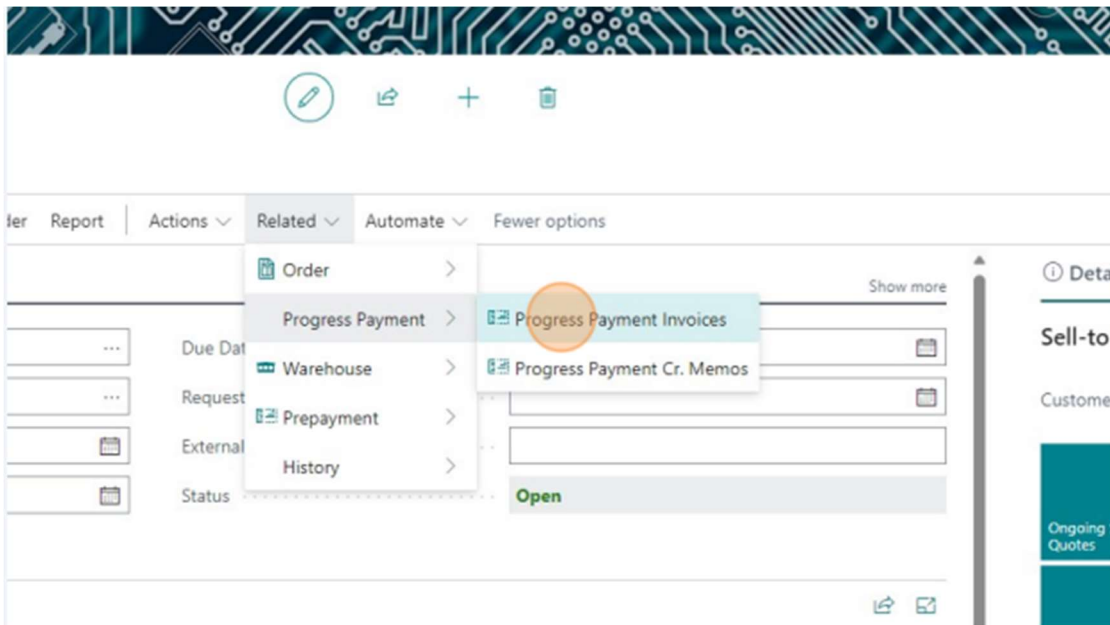
7) You will see the Customer Progress Payment recognized on the lines of the corresponding Posted Sales Invoice

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

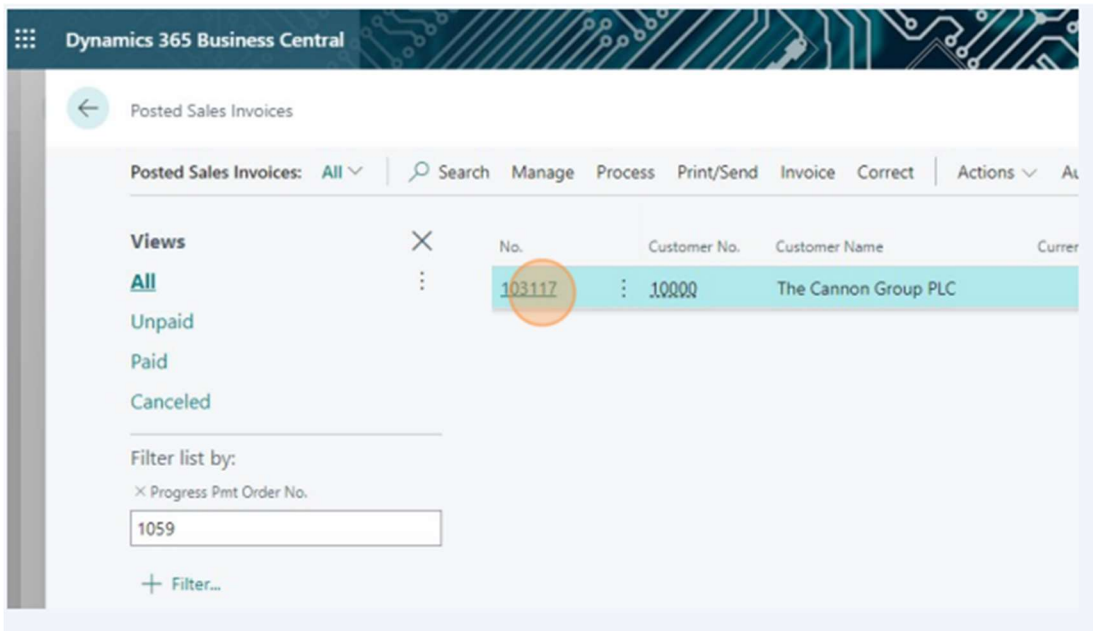
Find Progress Payment Documents

Do the following to find related Progress Payment Invoices

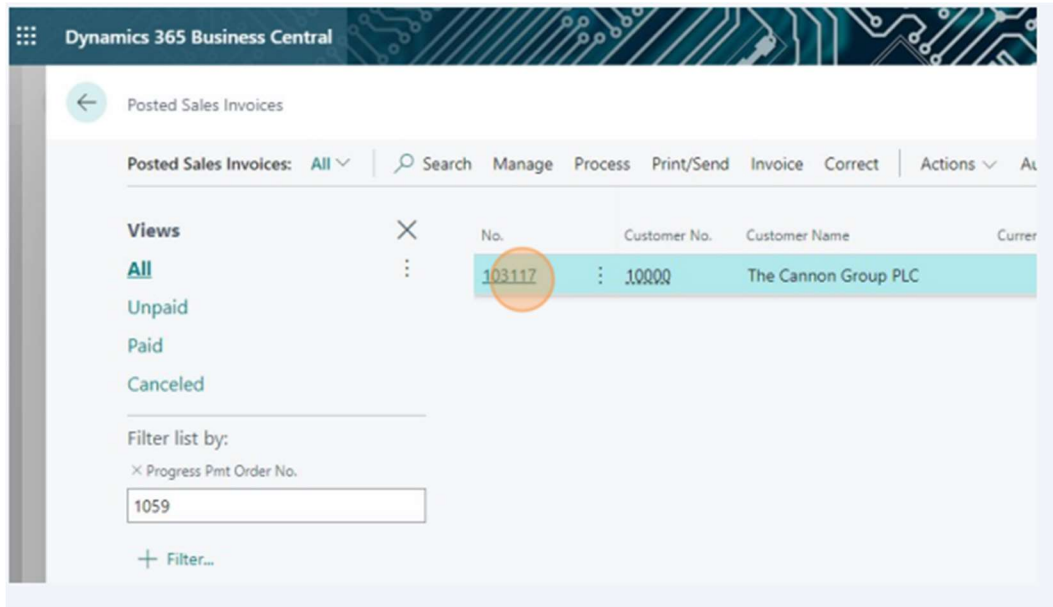
- 1) Click **Related>>Progress Payment>Progress Payment Invoices**



2) Open the **Posted Sales Invoice**



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



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

Progress Amount to Apply	<input type="text" value="0.00"/>	Posted Progress Documents		
Progress Payment Amount	10,000.00	Posting Type	Posted Document No.	Amount
Applied Progress Amount	0.00	→ Invoice	200048	10,000.00
Remaining Progress Amount	10,000.00			Document Remaining Amount
Show Line Details	<input checked="" type="checkbox"/>			10,000.00

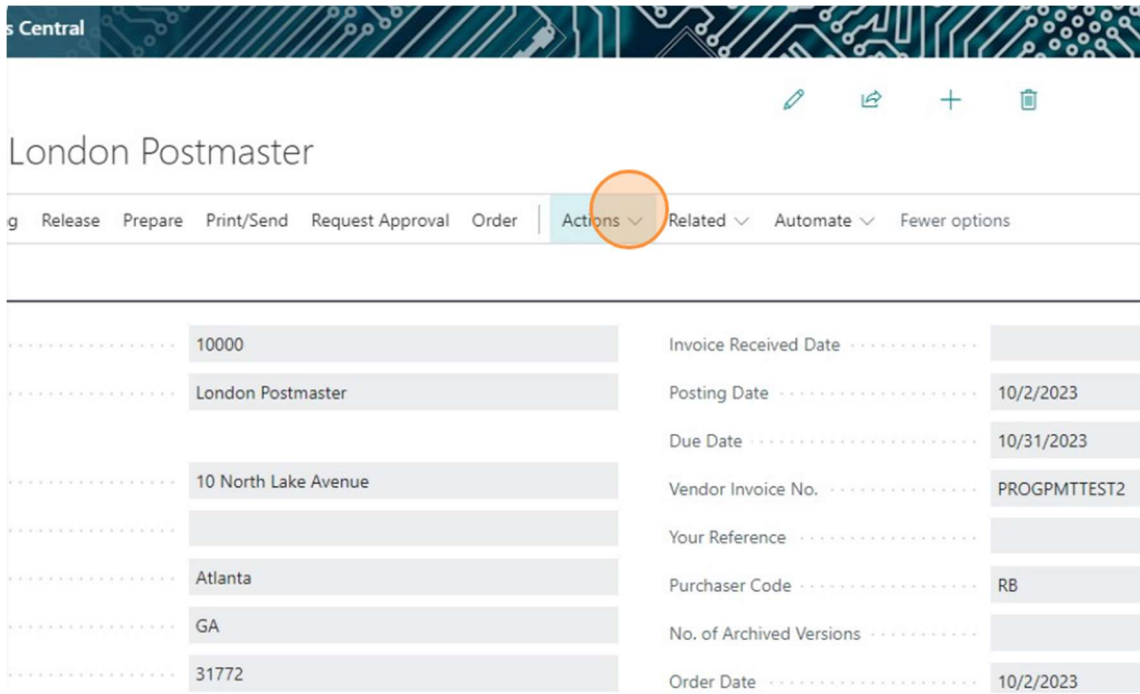
- g) Progress Amount to Apply
 - a. This field will be filled when you are posting the current Purchase order to allocate previously posted Progress Payment Invoices.
- h) Progress Amount Posted
 - a. The total of all Progress Payment Invoices posted for the current Purchase order.
- i) Applied Progress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

order.

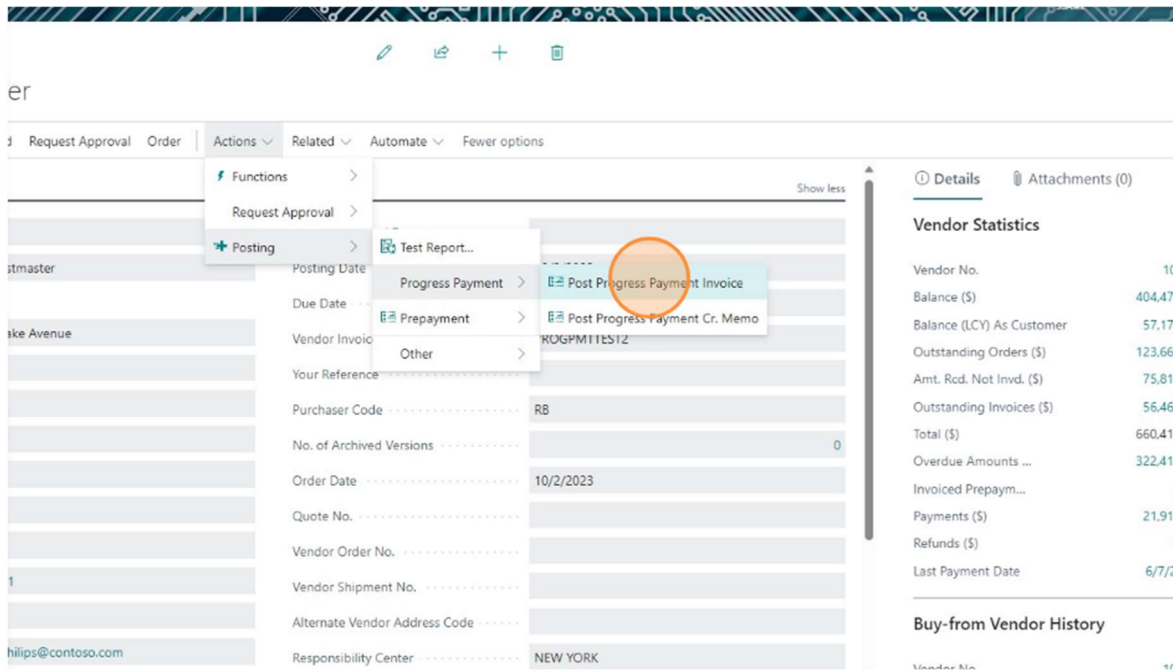
- j) Remaining Progress Amount
 - a. The total of Progress Payment Posted minus the Applied Progress Amount
- k) Show Line Details
 - a. Mark this to true if you want the line detail of the current Purchase order to transfer to the Progress Payment Invoice created.
- l) Posted Progress Documents
 - a. 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**.



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



er

Request Approval Order Actions Related Automate Fewer options

Functions

Request Approval

Posting

Test Report...

Progress Payment

Post Progress Payment Invoice

Prepayment

Post Progress Payment Cr. Memo

Other

Posting Date

Due Date

Vendor Invoice

Your Reference

Purchaser Code RB

No. of Archived Versions 0

Order Date 10/2/2023

Quote No.

Vendor Order No.

Vendor Shipment No.

Alternate Vendor Address Code

Responsibility Center NEW YORK

Details Attachments (0)

Vendor Statistics

Vendor No.	100
Balance (\$)	404,470
Balance (LCY) As Customer	57,173
Outstanding Orders (\$)	123,668
Amt. Rcd. Not Invd. (\$)	75,810
Outstanding Invoices (\$)	56,462
Total (\$)	660,411
Overdue Amounts ...	322,410
Invoiced Prepay...	0
Payments (\$)	21,914
Refunds (\$)	0
Last Payment Date	6/7/2023

Buy-from Vendor History

Vendor No. 100

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

Post Purchase Progress Payment

Options

Progress Payment Type Invoice

Progress Payment Posting Date 5/1/2023

Progress Payment Document Date 5/1/2023

Enter Progress Payment Amount 0.00

Vendor Invoice/CM No. INV 1234

Posting Description My Progress Payment Posting Desc

Payment Terms Code CM

Due Date 5/31/2023

Payment Discount % 0.00

Payment Discount Date 5/1/2023

Schedule... OK Cancel

10) Click **OK**.

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

1099 · London Postmaster

[Post](#) [Posting](#) [Release](#) [Prepare](#) [Print/Send](#) [Request Approval](#) [Order](#) | [Actions](#) [Related](#) [Automate](#) [Fewer options](#)

Total Excl. Tax (USD)	105,178.50	Total Excl. Tax (USD)	105,178.50
Discount Amount (USD)	0.00	Total Tax (USD)	0.00
Discount %	0	Total Incl. Tax (USD)	105,178.50

[Invoice Details](#) > CM

[Posting and Payment](#) > BLUE

Progress Payment

Progress Amount to Apply	0.00
Progress Payment Amount	10,000.00
Unpaid Progress Amount	0.00
Remaining Progress Amount	10,000.00

Line Details

Posted Progress Documents

Posting Type	Posted Document No.	Amount	Document Remaining Amount
→ Invoice	200050	10,000.00	10,000.00

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

Posted Progress Documents

Posting Type	Posted Document No.	Amount	Remaining Amount
→ Invoice	103117	10,000.00	<u>-10,000.00</u>

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.

Assigned User ID []
 Status **Open**

Discount % Line Amount Excl. Tax Qty. to Receive Quantity Received Qty. to Invoice Quantity Invoiced Qty. to Assign Item Chg. Amt

	105,178.50	100		100		0	
--	------------	-----	--	-----	--	---	--

Total Excl. Tax (USD) []
 Total Tax (USD) []

9) Enter the **Progress Amount to Apply**

Shipping and Payment >

Progress Payment

Progress Amount to Apply [0.00]
 Progress Payment Amount 10,000.00
 Applied Progress Amount 0.00
 Remaining Progress Amount 10,000.00
 Show Line Details

Posted Progress Documents v

Posting Type	Posted Docur
→ Invoice	2000

10) Click **Posting>>Post...**

Shipping and Payment >

Progress Payment

Progress Amount to Apply [0.00]
 Progress Payment Amount 10,000.00
 Applied Progress Amount 0.00
 Remaining Progress Amount 10,000.00
 Show Line Details

Posted Progress Documents v

Posting Type	Posted Docur
→ Invoice	2000

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
		105,178.50

i

Receive

Invoice

Receive and Invoice

Posted Progress Documents				
	Posting Type	Posted Document No.	Amount	Document Remaining Amount
3,000.00	→ Invoice	200050	10,000.00	10,000.00
10,000.00				

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

Shipping and Payment > BLUE

Progress Payment

Progress Amount to Apply	0.00
Progress Payment Amount	10,000.00
Applied Progress Amount	-3,000.00
Remaining Progress Amount	7,000.00

Show Line Details

Posted Progress Documents				
	Posting Type	Posted Document No.	Amount	Document Remaining Amount
→	Invoice	200050	10,000.00	10,000.00
	Application	200051	-3,000.00	0.00

Prepayment

Prepayment %	0	Prepmt. Payment Discount %	0
Compress Prepayment	<input checked="" type="checkbox"/>	Prepmt. Pmt. Discount Date	10/2/2023
Prepmt. Payment Terms Code	CM	Vendor Cr. Memo No.	
Prepayment Due Date	10/31/2023	Prepmt. Include Tax	<input type="checkbox"/>

13) The Remaining Progress Amount will now be updated

Progress Payment

Progress Amount to Apply	0.00
Progress Payment Amount	10,000.00
Applied Progress Amount	-3,000.00
Remaining Progress Amount	7,000.00
Show Line Details	<input type="checkbox"/>

Posted Progress Document

Posting Type	
→ Invoice	
Application	

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

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

Find Progress Payment Documents

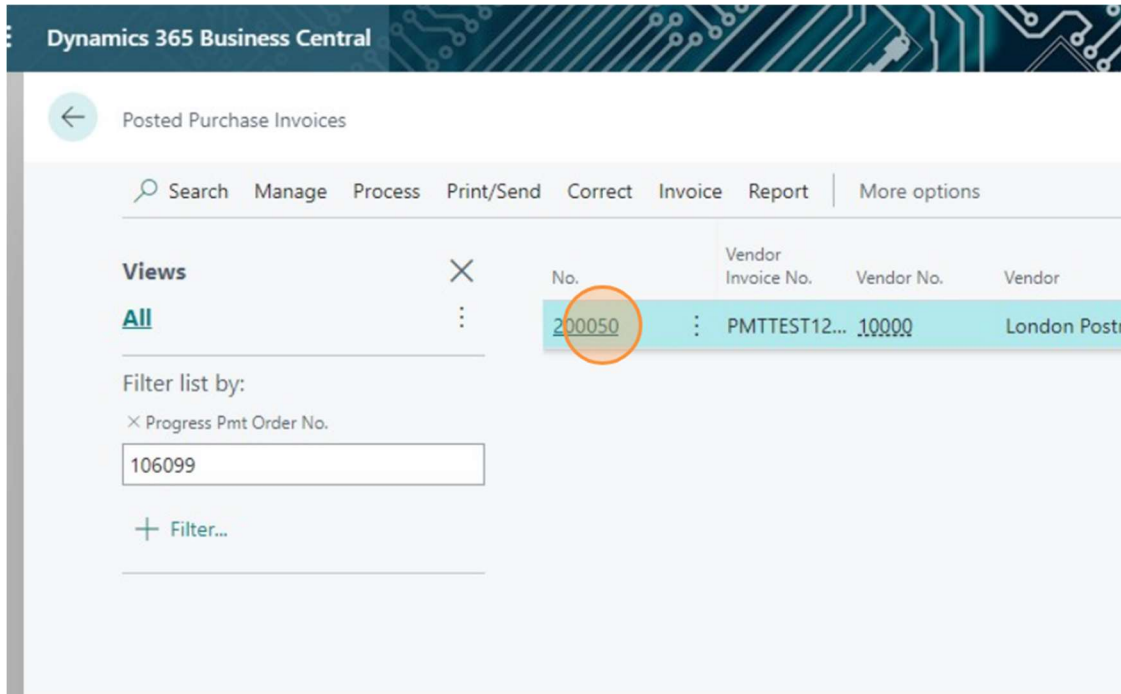
Do the following to find related Progress Payment Invoices

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

The screenshot shows a software interface with a dropdown menu open under the 'Related' tab. The menu items are 'Progress Payment Invoices' (highlighted with an orange circle) and 'Progress Payment Cr. Memos'. Below the menu, there are several input fields for invoice details:

- Invoice Received Date
- Posting Date: 10/2/2023
- Due Date: 10/31/2023
- Vendor Invoice No.: PMTTEST1234V1
- Your Reference
- Purchaser Code: RB

5) Open the **Posted Purchase Invoice**



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

City	Atlanta	Vendor Invoice No.	PMTTEST1234
State	GA	Vendor Order No.	
ZIP Code	31772	Pre-Assigned No.	2023
Country/Region	US	No. Printed	
Contact No.	CT000129	Order Address Code	
Phone No.	4255550101	Purchaser Code	RB
Mobile Phone No.		Responsibility Center	NEW YORK
Email	mrs.carol.philips@contoso.com	Canceled	No
Contact	Mrs. Carol Philips	Corrective	No

Type	No.	Item Reference No.	Description	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax
→ <u>G/L Account</u>	13510		Progress Payment	1		10,000.00

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.

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.