



# STEELHEAD

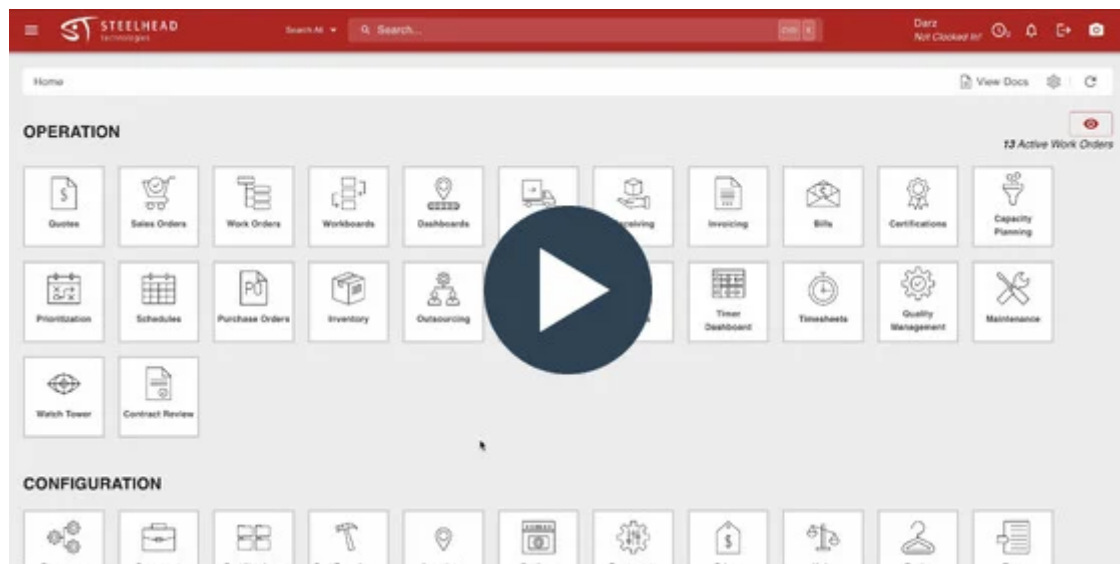
technologies

## New Screens in "Invoicing" and "All Packing Slips" Pages for Resolving Invoicing Questions

Late on Tuesday, August 13th 2024, Steelhead released an update to the "Invoicing" page and the "All Packing Slips" page to give you more visibility for parts being invoiced.

When creating blanket orders, it's possible for parts to not be marked as "Complete" or "Is Done Invoicing." Common questions that result from this include "Why can't I invoice for my parts?" and "Why can't I complete parts when they're already invoiced?" This update effectively flags the issue and gives you action steps to easily resolve it.

Please click the video for a quick explanation of how this helps you with invoicing.



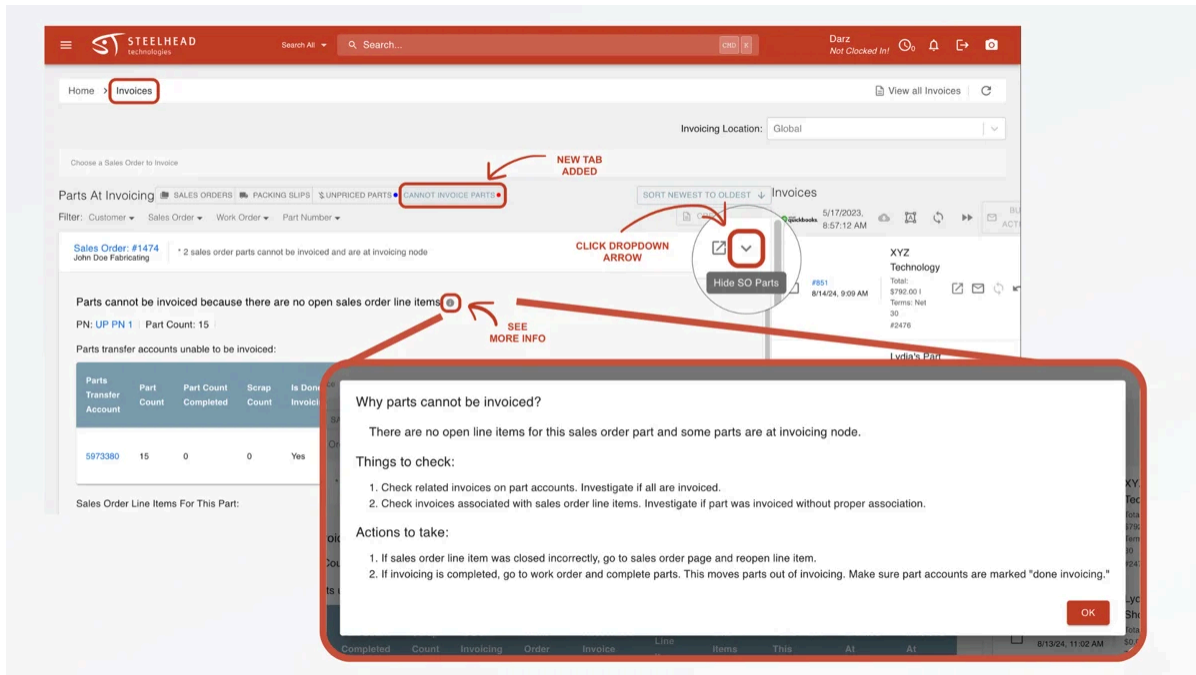
## Quick Overview:

There are two new ways to correct parts that are in the invoicing node and need review. One is from the Invoicing dashboard, and the other is from the Shipping dashboard under All Packing Slips.

### 1. From the Invoicing dashboard:

a) Click the new tab called "Cannot Invoice Parts." This tab includes:

- Any parts that cannot be invoiced (because there are no open Sales Order line items).
- Parts that were invoiced but not completed from the Work Order.



To see more info about why the parts cannot be invoiced, click the Information icon.

b) Click on the Work Order to open it up.

Parts transfer accounts unable to be invoiced:

Parts Transfer Account	Part Count	Part Count Completed	Scrap Count	Is Done Invoicing	Work Order	Associated Invoice	Invoice Line Items	Invoice Line Items Quantity	Associated Parts From This Account	Created At	Invoiced At
5973380	15	0	0	Yes	#2709 - Process: Batch Powder	#552	Line Number: 1	Invoiced Amount: 15	15	6/5/2024, 8:38:32 AM	6/5/2024, 8:38:32 AM

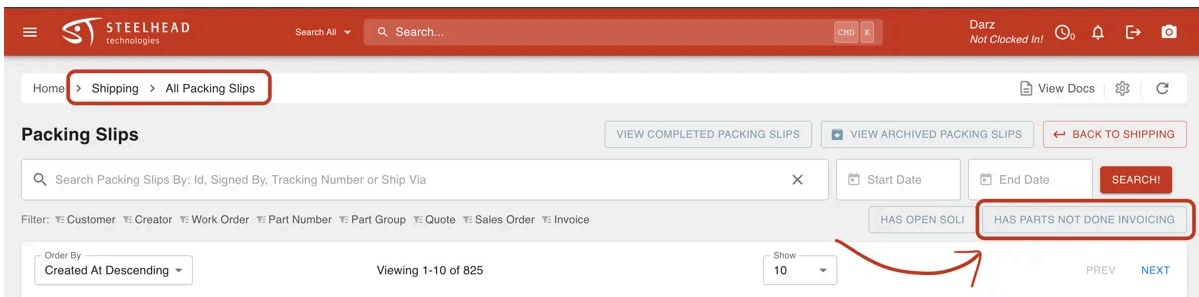
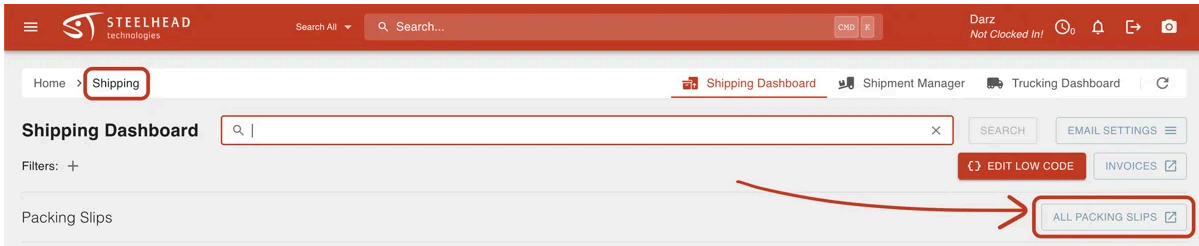
c) Scroll down and click "Complete Parts" button to complete.



This will clear these parts from your "Cannot Invoice Parts" list.

## 2. From the Shipping dashboard:

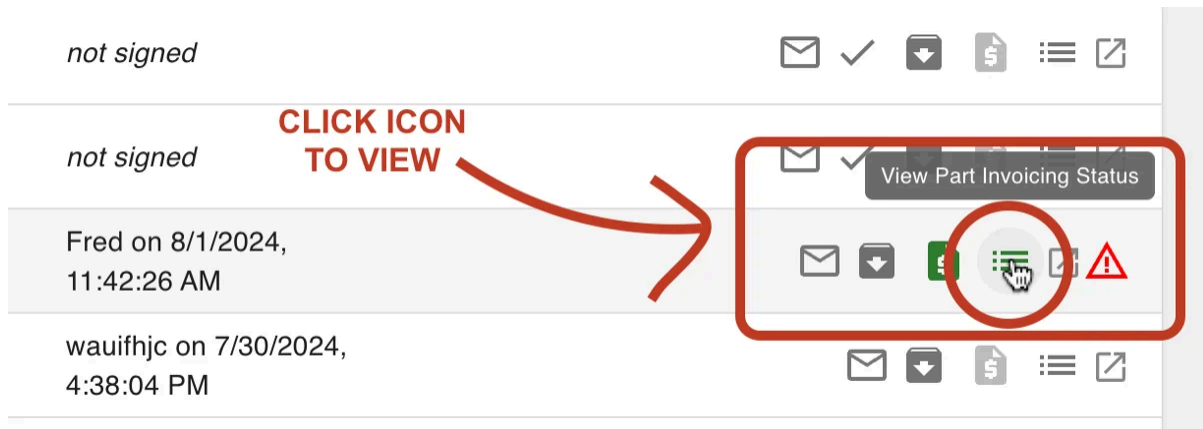
a) Click on "All Packing Slips," then "Has Parts Not Done Invoicing"



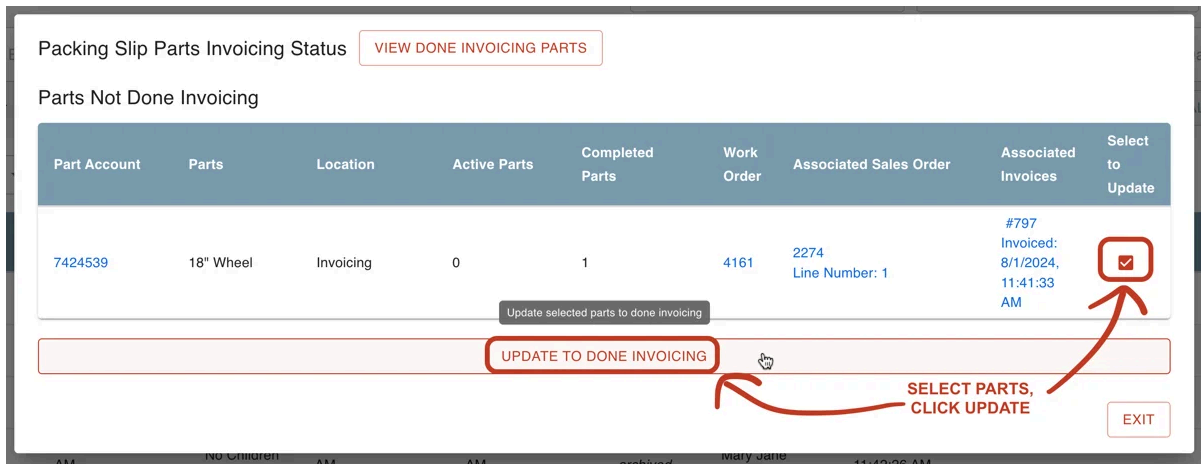
b) Scroll down and look for the red triangle Warning icon. Clicking it will open up the same dialog box, which explains why parts cannot be invoiced and gives possible corrections.

#936	Julia's Parts	8/9/2024, 2:57:38 PM	No Children	8/9/2024, 2:57:44 PM	8/9/2024, 3:10:59 PM	not archived	Julia	jy on 8/9/2024, 2:57:53 PM	
#913	Lydia's Part Shop	8/8/2024, 1:45:14 PM	No Children	8/8/2024, 1:45:20 PM	8/8/2024, 1:45:37 PM	not archived	Lydia	LD on 8/8/2024, 1:45:31 PM	
#906	ABC Manufacturing	8/7/2024, 11:20:56 AM	No Children	8/7/2024, 11:21:03 AM	8/7/2024, 11:21:14 AM	not archived	Lydia	LD on 8/7/2024, 11:21:09 AM	
#896	Julia's Parts	8/6/2024, 1:41:11 PM	No Children	8/6/2024, 1:41:17 PM	8/6/2024, 1:43:07 PM	not archived	Julia	jy on 8/6/2024, 1:41:26 PM	

c) Click on the green icon, "View Part Invoicing Status."



d) Select the checkbox next to the parts you want to complete, then click "Update to Done Invoicing" button.



This will clear the the warning for these parts.

We hope that these updates will help you to quickly and easily resolve questions related to invoicing and completing parts. As always, please reach out to us at [support@gosteelhead.com](mailto:support@gosteelhead.com) with any questions!

[VIEW ALL PRODUCT UPDATES](#)

Steelhead Technologies, 100 5th Street, Suite 2, Calumet, MI 49913, United States

[Manage preferences](#)