



Invoicing  
Plan (IPL)

## INVOICING PLAN

CREATE AND MANAGE CUSTOMIZED PAYMENT PLANS  
IN MICROSOFT DYNAMICS 365 BUSINESS CENTRAL



The  
future  
behind

[www.eos-solutions.it/en/invoicing-plan.html](http://www.eos-solutions.it/en/invoicing-plan.html)



# Invoicing Plan

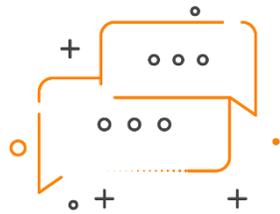
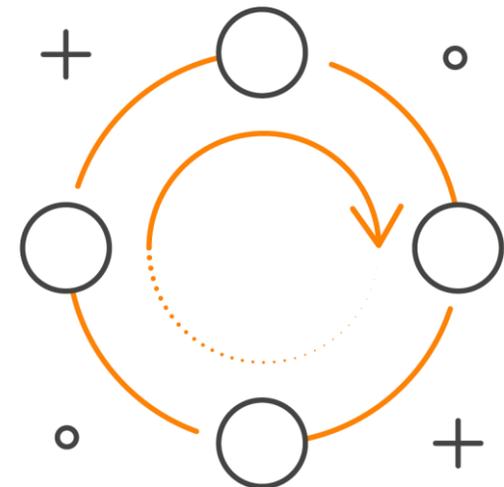
App for Microsoft Dynamics 365 Business Central



DO YOU WANT TO DEFINE AN INVOICING PLAN BASED ON THE AGREEMENTS MADE WITH THE CUSTOMER?

DO YOU WANT TO POST INVOICES IN ADVANCE AS THE PROJECT PROGRESSES AND POST THE CLOSING INVOICE WHEN YOU ARE DONE?

The **Invoicing Plan** Eos Solutions app helps the business to **create and manage customized payment plans** in Microsoft Dynamics Business Central



# Here is a list of the features involved



Tell me what you want to do



ipl

On current page (Sales Order Processor)

Go to Pages and Tasks

Show less (3)

> Currencies

Lists

> Invoice Plan List (IPL)

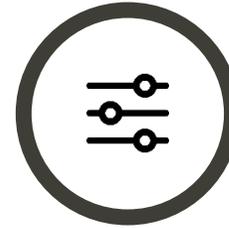
Lists

> Invoice Plan Setup (IPL)

Administration

> Invoice Plan Template List (IPL)

Administration



## Define the Invoicing Plan

parameters as agreed with the customer



## Keep track

of the project progress invoices



## Post

the Anticipated Payments Invoices



## Create

the closing invoice when the project is finished



The  
future  
behind

# Invoicing plan on the Sales Order

Sales Order | Work Date: 7/10/2022

## 1021 · Spotsmeyer's Furnishings

Process Report Release Posting Prepare Order Request Approval Print/Send Navigate **Actions** Related Reports Fewer options

Functions Commissions Product Quality Assurance Plan Request Approval Warehouse Posting Print Print Packing List Order Confirmation

Payments

Create Purchase Document

Calculate Invoice Discount

Get Recurring Sales Lines...

Copy Document...

Verify VAT Exemptions

Move Negative Lines...

Archive Document

Send IC Sales Order

Incoming Document

Suggest Transport Cost

**Invoice Plan (IPL)**

New Item From Sales Price

Calculate SFA Price

Insert Free Goods Lines

Order Date: 5/1/2021

Requested Delivery Date:

Operation Type: EST-FN-VEN

Activity Code: \*

Status: **Released**

Reason Code:

Documents-To Contact No.:

Commissions

Commission Group:

Salespersons: 0

Exclude from Commission:

Con...	Description	Variant Code	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	VAT Prod. Posting G
<input type="checkbox"/>	Vendite di prodotti - UE		BLU	1		10,000.00	IVA20
<input type="checkbox"/>	Vendite di prodotti - UE		BLU	1		5,000.00	IVA20

Subtotal Excl. VAT (USD): 15,000.00

Inv. Discount Amount Exc...: 0.00

Invoice Discount %: 0

Detailed Header Discount: 0

Total Excl. VAT (USD): 15,000.00

Total VAT (USD): 3,000.00

Total Incl. VAT (USD): 18,000.00

**YOU NEED TO RELEASE THE ORDER BEFORE CREATING THE INVOICING PLAN**

On the Sales Order page, **from Actions->Functions->Invoice Plan (IPL)** we open the Invoicing Plan card

# Invoicing plan on the Sales Order

Edit - Invoice Plan - IP000007

Manage Create Anticipated Invoice Create Credit Memo Create Closing Invoice Actions Related Fewer options

**General** Show less

No. IP000007 Address 705 West Peachtree Street Order Amount 15,000.00  
Invoice Plan Template Code IPT000001 Address 2 Invoice Plan Amount 6,000.00  
Source Document No. 1021 Post Code/City US-GA 31772 Invoice Plan Remaining Amount 6,000.00  
Source No. 01454545 City Atlanta Posted Amount 6,000.00  
Name New Concepts Furniture Country/Region Code US Open Amount -  
Name 2 Currency Code USD Completely Invoiced   
Gen. Bus. Posting Group ESPORTAZ

Lines Manage Line Fewer options

Planned Invoice Date	Invoice Type	Share in %	Amount	Invoiced Amount	Payment Terms Code	Payment Method Code	Execute Action	Invoice No.	Posting Date	Credit Memo No.	Credit Memo Amount	Description	Shipment No. Filter	Shipment Amount
→ 5/1/2021	Anticipated Paym...	10	1,500.00	1,500.00			<input checked="" type="checkbox"/>				1,500.00	Anticipated Payment Invoice 10 %		0.00
5/31/2021	Anticipated Paym...	40	6,000.00	6,000.00			<input type="checkbox"/>				0.00	Anticipated Payment Invoice 40 %		0.00
6/30/2021	Closing Invoice	0	0.00	0.00			<input type="checkbox"/>				0.00	Fattura completamento progetto		0.00

**Posting**

Department Code VENDITE Gen. Prod. Posting Group VARIE Closed   
Project Code VAT Prod. Posting Group IVA20 Closing Invoice corrected   
Description Standard 30%+30%+40% VAT Bus. Posting Group ESPORTAZ  
Description 2 Account AP Invoice 6131

## HEADER

You can fill in the page manually or it is possible to create one or more Invoice Plan Templates according to the needs.

## LINES

Create or edit the Invoice Plan lines according to the agreements with the customer.

## POSTING

On this tab there is information about Department and Project Code, Description of the Template, Account where the invoice is posted.

# Anticipated Invoices

**Edit - Invoice Plan - IP0000007**

Manage **Create Anticipated Invoice** Create Credit Memo Create Closing Invoice | More options

**General** >

Lines | Manage Line Fewer options

Planned Invoice Date	Invoice Type	Share in %	Amount	Invoiced Amount	Payment Terms Code	Payment Method Code	Execute Action
→ 01/05/2021	Anticipated Payment Invoice	10	1.500,00	1.500,00			<input checked="" type="checkbox"/>
31/05/2021	Anticipated Payment Invoice	40	6.000,00	6.000,00			<input type="checkbox"/>
30/06/2021	Closing Invoice	0	0,00	0,00			<input type="checkbox"/>

**Sales Invoice from Invoice Plan**

Posting Date .....

Create single invoice .....

**Filter: Invoice Plan Header**

× No. .... IP0000007

+ Filter...

Filter totals by:

+ Filter...

**Advanced** >

OK Cancel

In order to create an **Anticipated Invoice**, set the "Execute Action" box on the desired line to True and then click on "Create Anticipated Invoice".

You need to repeat this action for all the Anticipated Payment Invoices.

By pressing OK, the Anticipated Invoice is created (not yet posted).

Then, it is possible to post.

If needed, you can create a **Credit memo directly from the Invoice Plan** from Actions->Functions->Create Credit Memo.

The credit memo need to be manually posted afterwards. It will show the references to the Invoicing Plan.

# Closing Invoice

Type	Description	Location Code	Quantity	Unit of Measure Code	Tariff No.	Unit Price Excl. VAT	Incl. in VAT Trans. Rep.	Line Discount %	Detailed Line Discount
Comment	Our Order 1021 dated 01/05/21						<input type="checkbox"/>		0
Comment	SHIPMENT NO. 102080 OF 01/05...						<input type="checkbox"/>		0
G/L Account	Vendite di prodotti - UE	BLU	1			10,000.00	<input type="checkbox"/>		0
G/L Account	Vendite di prodotti - UE	BLU	1			5,000.00	<input type="checkbox"/>		0
G/L Account	Reverse invoice 21-CX010014 of ...	GIALLO	1			-5,000.00	<input type="checkbox"/>		0

Subtotal Excl. VAT (USD)	9,000.00	Total Excl. VAT (USD)	9,000.00
Inv. Discount Amount Excl. VAT (USD)	0.00	Total VAT (USD)	1,800.00
Invoice Discount %	0	Total Incl. VAT (USD)	10,800.00

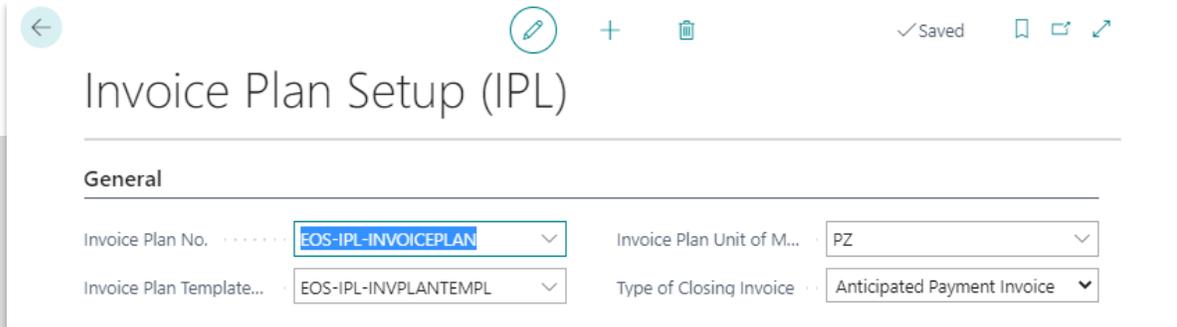
THE INVOICE POSTING  
MUST BE EXECUTED ON  
THE INVOICE PLAN PAGE

From the Invoice Plan page, we check the option "Execute Action" on the line related to the Closing Invoice and we select **Actions->Functions->Create Closing Invoice**.

It shows:

- **Shipment reference**
- **Reference to the two order lines** with the related unit price (10.000 + 5.000)
- **A reversing line for the anticipated payment** (the other one is yet reversed by the credit memo). Alternatively, we can first create a credit memo for the second Anticipated Payment and then create the Closing invoice that will show only the shipment reference and the order lines with the prices.

# Setup



Invoice Plan Setup (IPL)

General

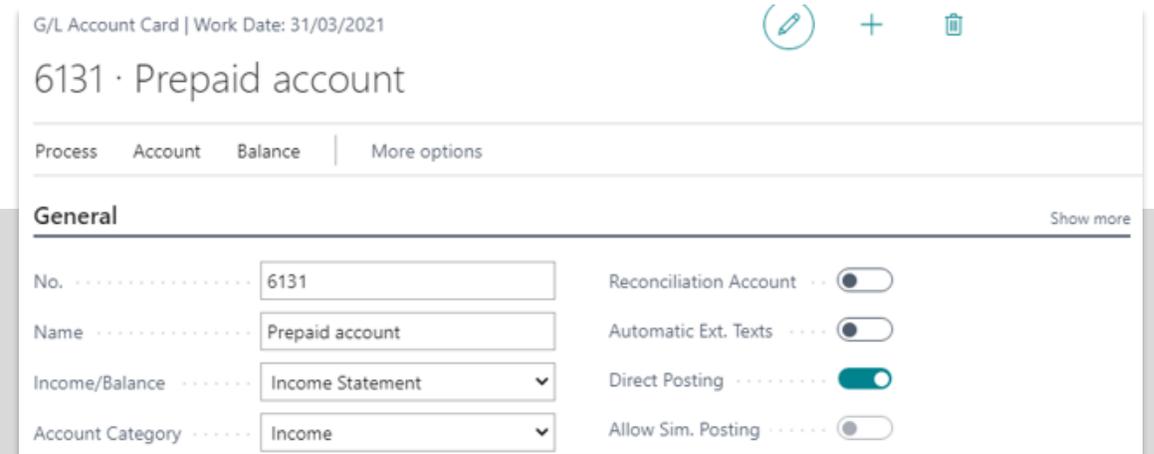
Invoice Plan No. : EOS-IPL-INVOICEPLAN

Invoice Plan Unit of M... : PZ

Invoice Plan Template... : EOS-IPL-INVPLANTEML

Type of Closing Invoice : Anticipated Payment Invoice

✓ Saved



G/L Account Card | Work Date: 31/03/2021

6131 · Prepaid account

Process Account Balance | More options

General Show more

No. : 6131

Name : Prepaid account

Income/Balance : Income Statement

Account Category : Income

Reconciliation Account :

Automatic Ext. Texts :

Direct Posting :

Allow Sim. Posting :

It is necessary to define the **Serial numbers and the invoice plan unit of measure** for the lines.

In addition, create, according to the customer requirements, one or more **accounts dedicated to the prepayments**.

# Invoicing Plan

## App for Microsoft Dynamics 365 Business Central

### SUBSCRIPTION

Some features of the Invoicing Plan app require a subscription. The subscription can be activated from Subscription control panel or directly from the notification messages that the system proposes, by clicking on the link that allows you to start the subscription wizard.

Contact us for more info:

[www.eos-solutions.it/en/contact-support.html](http://www.eos-solutions.it/en/contact-support.html)

