Sage Intacct mini-uSER Guide

OE: Sales Invoice

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This guide includes instructions on how to process payments against a sales invoice within Sage Intacct.

Instructions:

Navigate to **“Dashboards” > “Order Entry” > “Transactions” > “Sales Invoice”**

1. If you need to add a new sales invoice, click “**Add**” on the top right-hand side of the page.
   1. Graphical user interface, text, application, Word

      Description automatically generatedNOTE: If you want to work with an existing invoice, jump to Step 4.
2. Fill out the invoice.
   1. Select the Customer, Payment Terms, and Item ID.
3. Select **“Post & Pay”.**

Graphical user interface, application, email

Description automatically generated

1. Click “**View**” on the Sales Invoice line item like you would like to pay.
2. Select **“Pay with Paya**” in the top right-hand of the screen.
   1. You can select **“One Time Use Payment”** from the dropdown if you’d like to make a one-time payment.
3. Enter the required payment information, then select **“Authorize”**

Graphical user interface

Description automatically generated with medium confidence

1. Ensure the payment status has been updated to paid, then select **“Done”**