

Consolidating Invoices

12 Steps [View most recent version](#) 

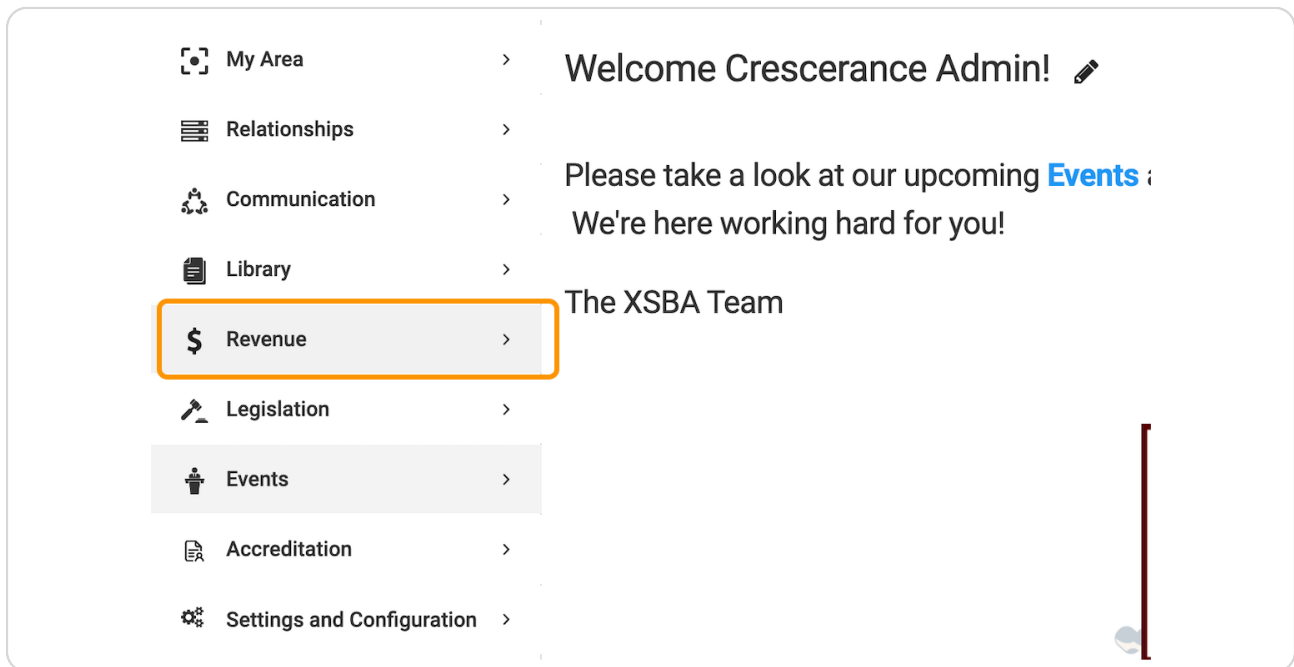
Created by
Engagifii Inc.

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November 29, 2023

STEP 1

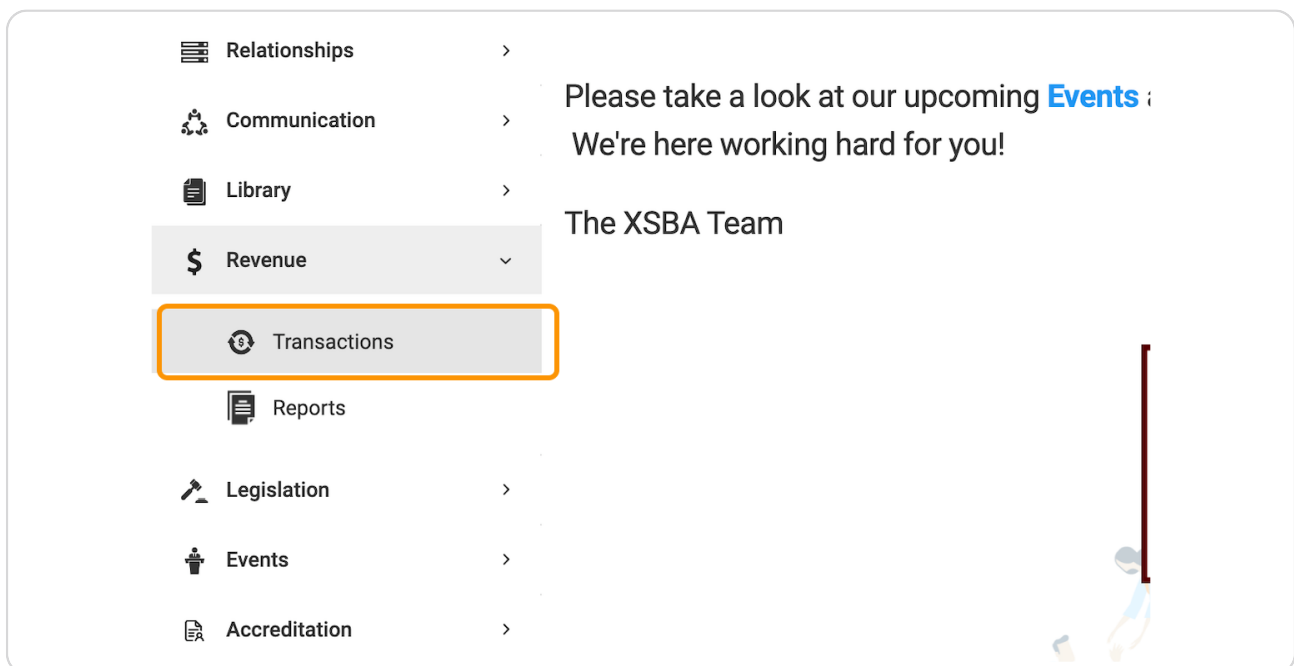
Click on Revenue



The screenshot shows a dashboard interface. On the left is a sidebar menu with the following items: My Area, Relationships, Communication, Library, Revenue (highlighted with an orange border), Legislation, Events, Accreditation, and Settings and Configuration. On the right, the main content area displays a welcome message: "Welcome Crescerance Admin! ✎", followed by "Please take a look at our upcoming [Events](#) : We're here working hard for you!", and "The XSBA Team". A vertical scrollbar is visible on the right side of the main content area.

STEP 2

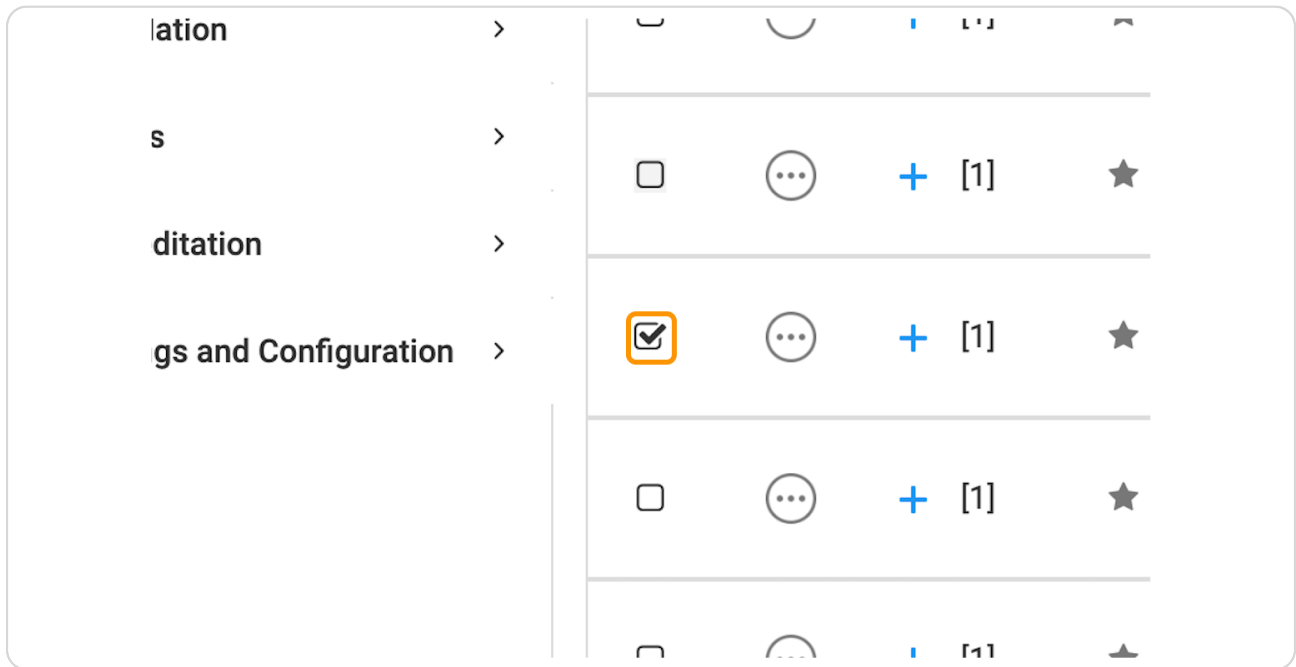
Click on Transactions



The screenshot shows the same dashboard interface as in Step 1. The sidebar menu items are: Relationships, Communication, Library, Revenue, Transactions (highlighted with an orange border), Reports, Legislation, Events, and Accreditation. The main content area on the right remains the same, displaying the welcome message and "The XSBA Team". A vertical scrollbar is visible on the right side of the main content area.

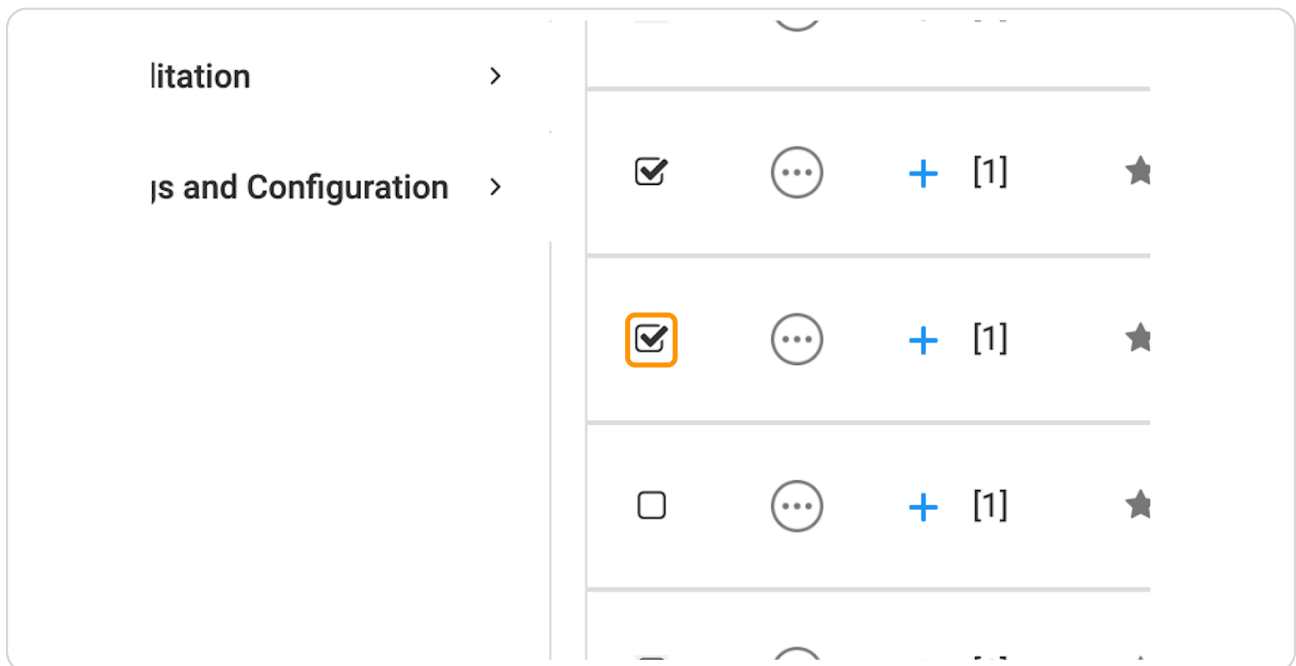
STEP 3

Check on your first invoice to add to the consolidation



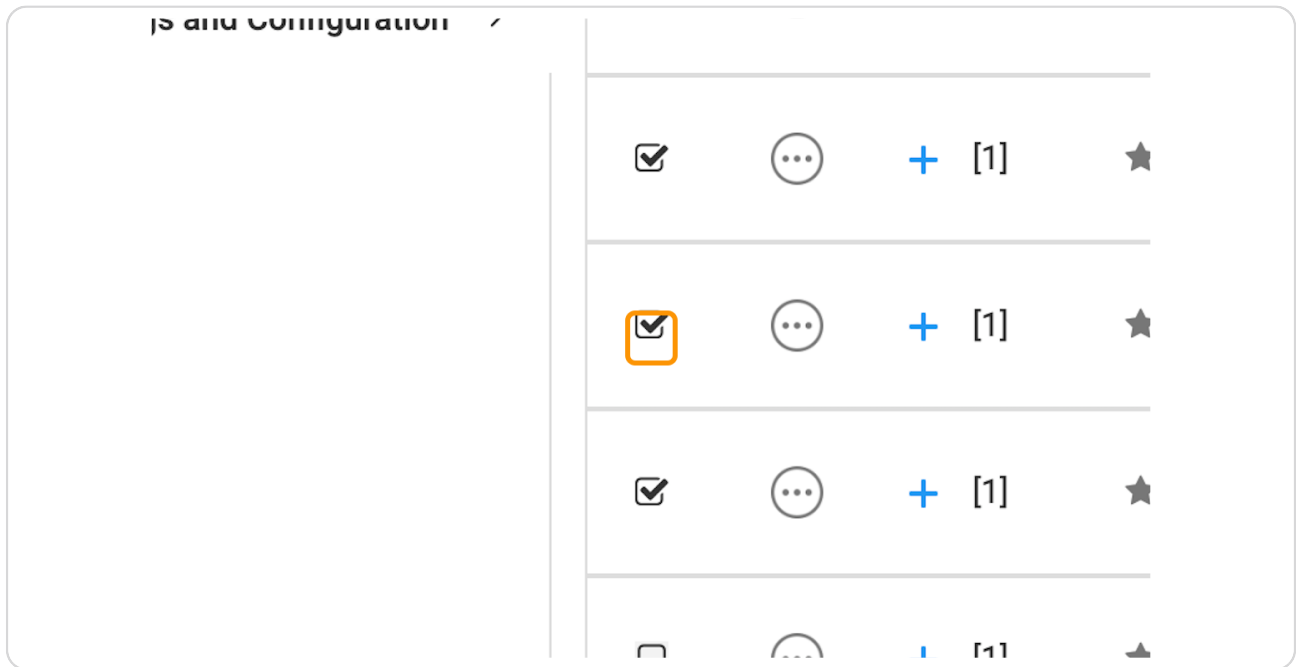
STEP 4

Check on your second



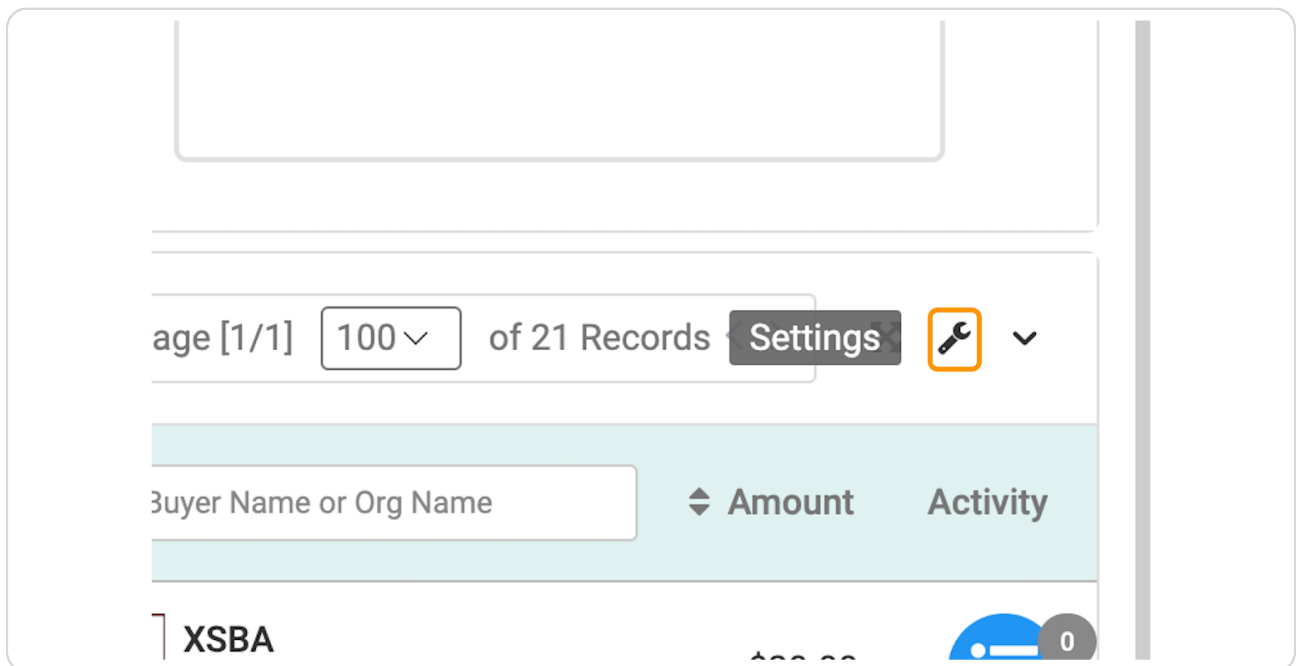
STEP 5

Check on any more that you'd like to have consolidated into one



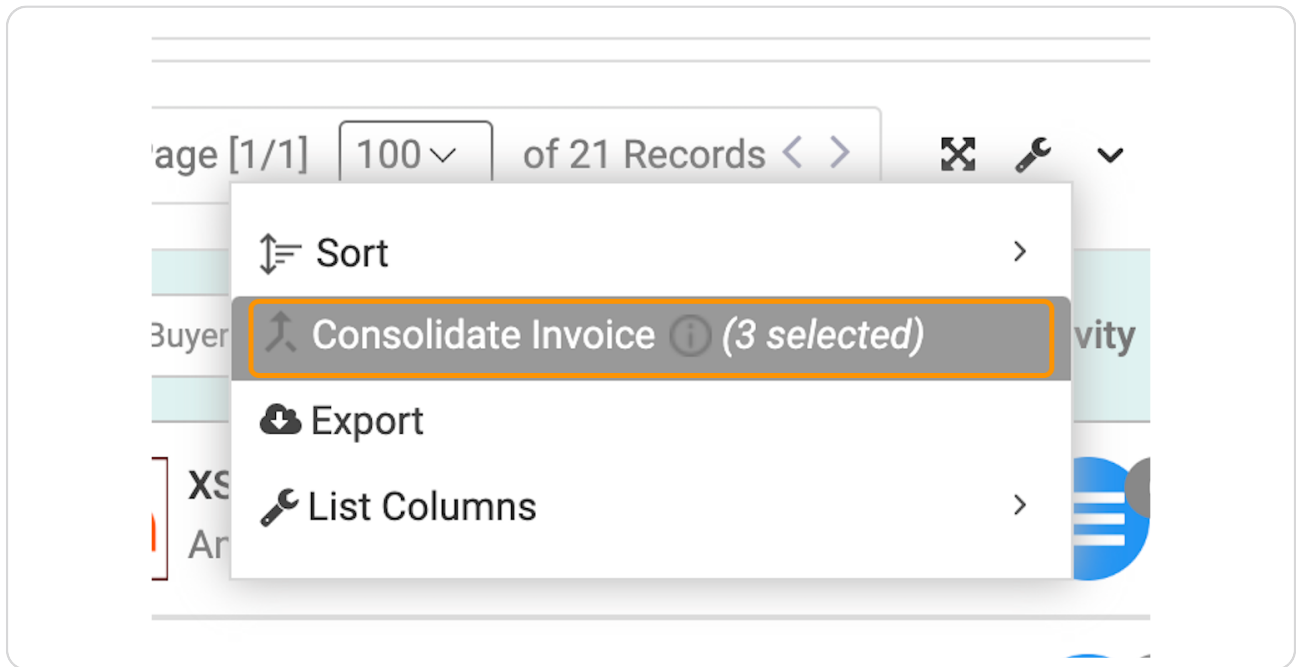
STEP 6

Click on the Settings icon



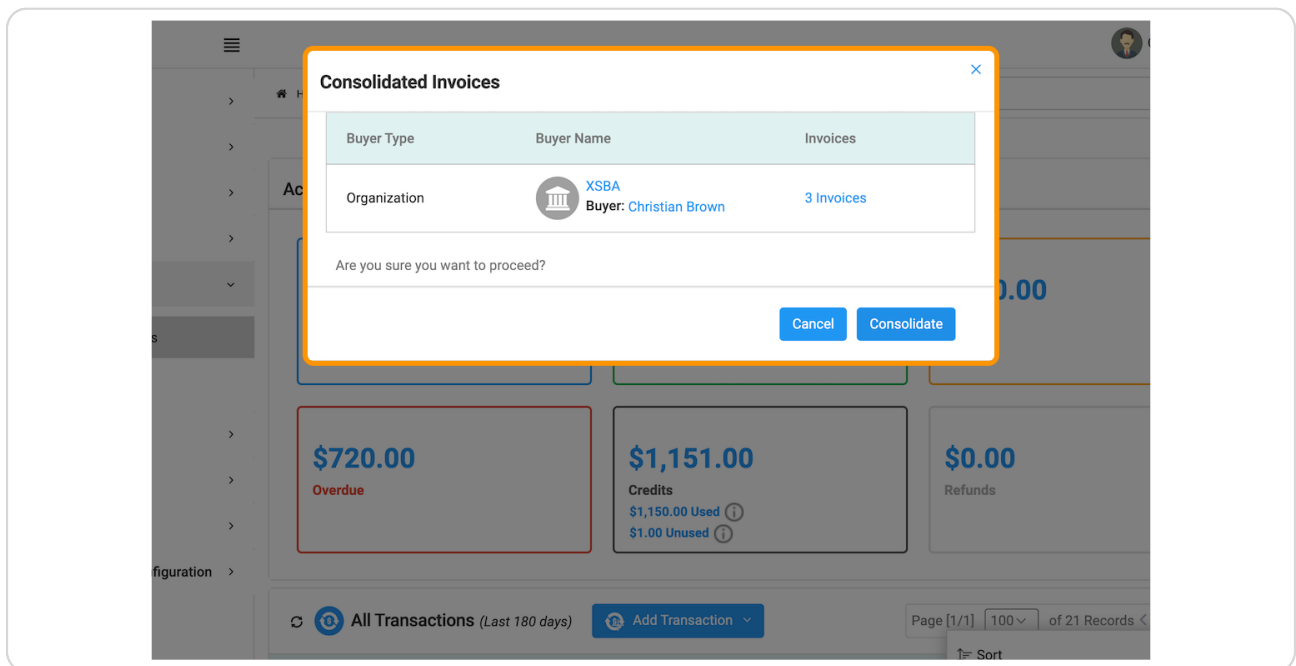
STEP 7

Click on Consolidate Invoice



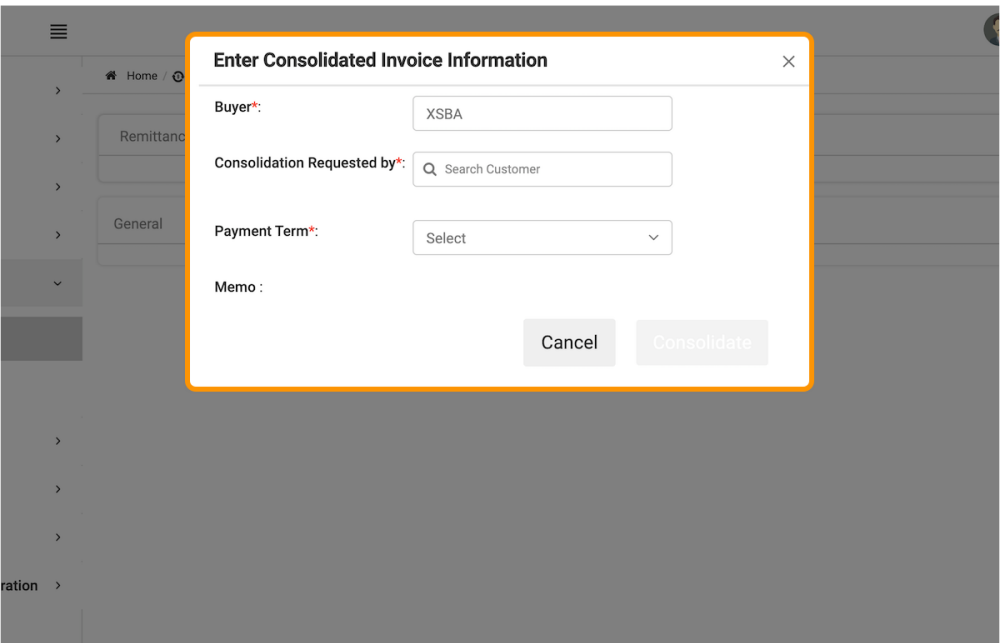
STEP 8

The review window will pop up, click on Consolidate



STEP 9

Fill out the necessary fields



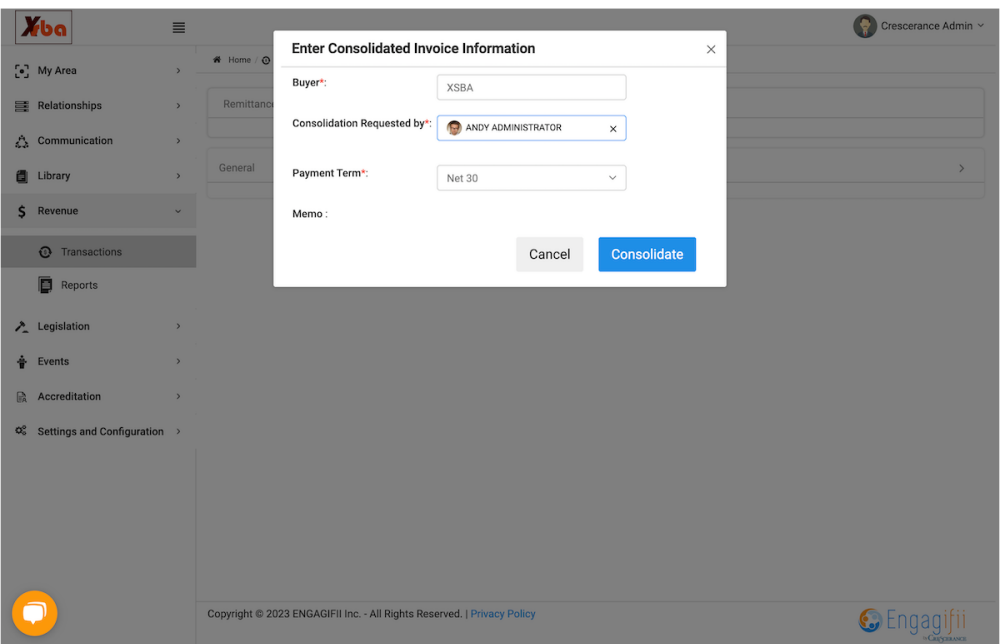
The screenshot shows a web application interface with a modal dialog box titled "Enter Consolidated Invoice Information". The dialog box has a close button (X) in the top right corner. It contains the following fields:

- Buyer*:** A text input field containing "XSBA".
- Consolidation Requested by*:** A search input field with a magnifying glass icon and the placeholder text "Search Customer".
- Payment Term*:** A dropdown menu with "Select" as the current selection.
- Memo :** A text area for entering a memo.

At the bottom of the dialog box, there are two buttons: "Cancel" and "Consolidate".

STEP 10

Here are what the fields will look like filled in



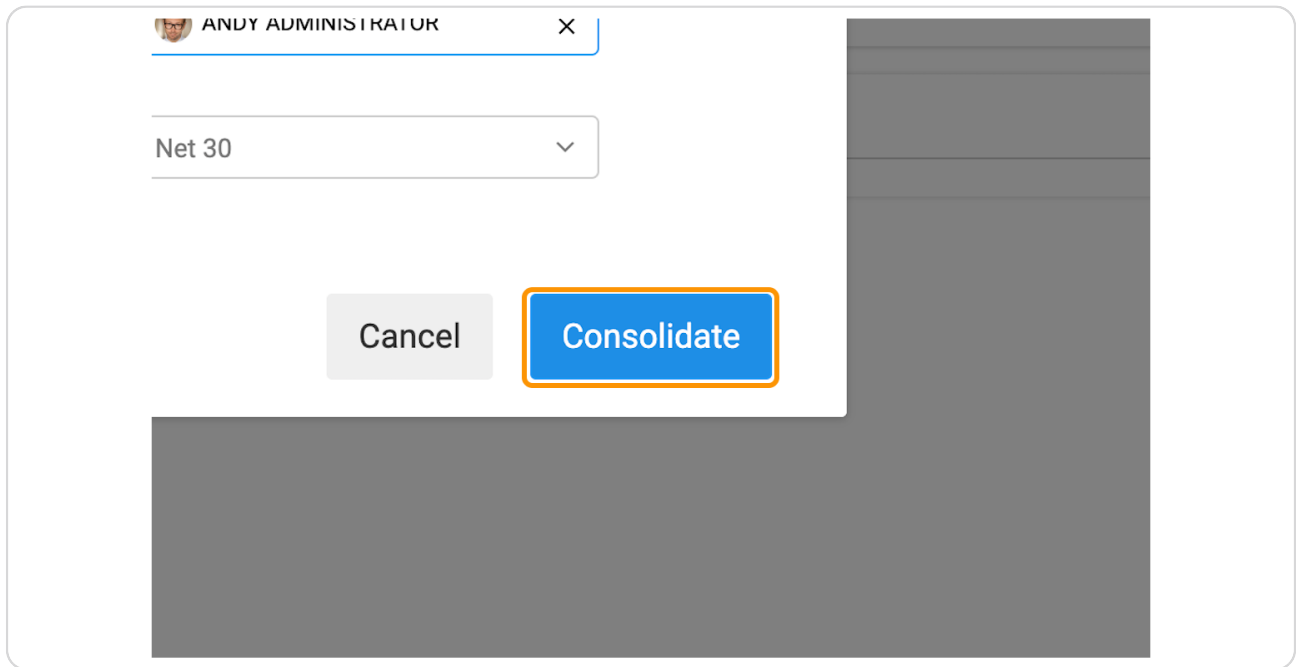
The screenshot shows the same web application interface as in Step 9, but with the "Enter Consolidated Invoice Information" dialog box filled out. The fields are now populated with the following data:

- Buyer*:** XSBA
- Consolidation Requested by*:** ANDY ADMINISTRATOR (with a user profile icon and a close button X)
- Payment Term*:** Net 30
- Memo :** (Empty)

The "Consolidate" button is now highlighted in blue, indicating it is the primary action. The "Cancel" button remains grey. The background shows a sidebar menu with items like "My Area", "Relationships", "Communication", "Library", "Revenue", "Transactions", "Reports", "Legislation", "Events", "Accreditation", and "Settings and Configuration". The footer includes the Engagifii logo and copyright information: "Copyright © 2023 ENGAGIFII Inc. - All Rights Reserved. | Privacy Policy".

STEP 11

Click on Consolidate



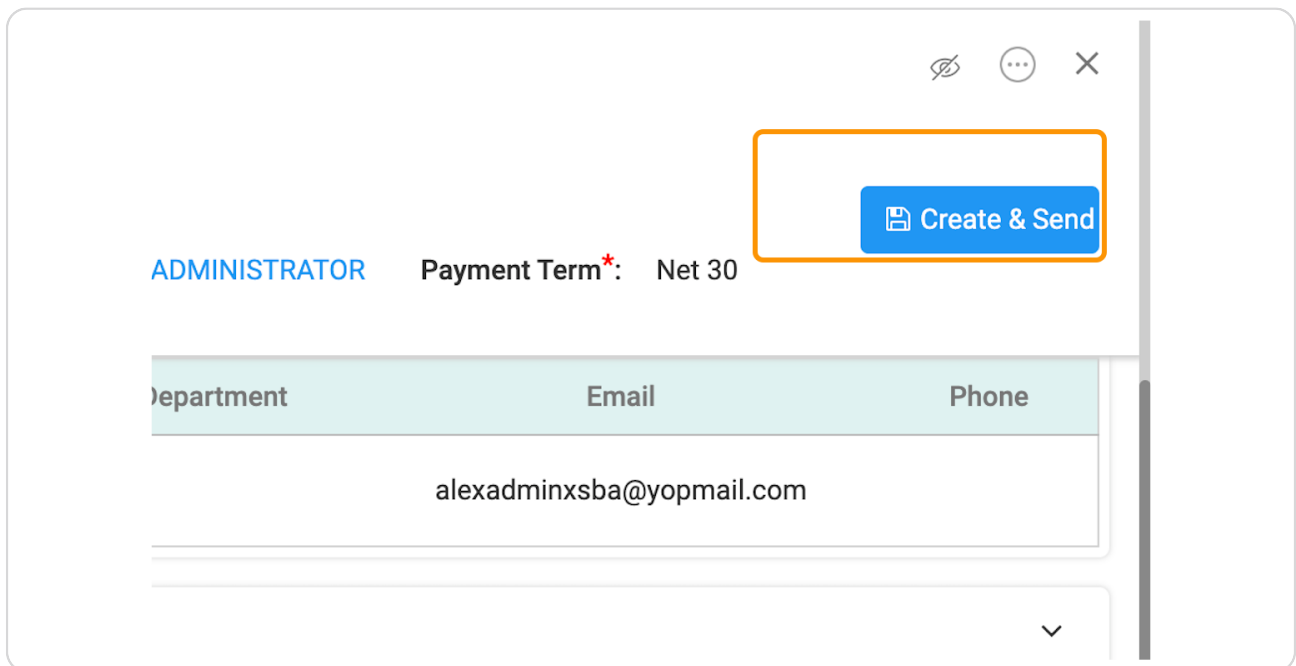
ANDY ADMINISTRATOR X

Net 30 v

Cancel Consolidate

STEP 12

Click on Create & Send



ADMINISTRATOR Payment Term*: Net 30

Create & Send

Department	Email	Phone
	alexadminxsba@yopmail.com	

