

Invoice Batching from Exigo Admin

v 1.0



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Invoice Batching from Exigo Admin

A few important things to know about Invoice Batching:

- Invoice Batching is only available in Exigo Admin (exigo.com).
- Batches are segregated by Warehouse.
- Batch size = 100 Invoices per Batch.
- Only Orders in Accepted Status are available for Batching.

How to Process Invoice Batches:

STEP 1: Go to Accounting > Invoices. The following Screen will be displayed:

Home	>> Invoices			so	RT BY (CC DECLINED) 🔻
Customer	Main		Order Batches		
	and Second second	1.011	DESCRIPTION	BATCH TOTAL	
	Pending	221	2	0	
	CC Declined	284	Australia	2	REPRINT
	ACH Declined	2	Canada	2	DEDDINT
	Cancelled	2296		-	HEP SUR
	CC Pending	9	T Conferences	0	
	Accepted	2 Create New Batch	Crossroads Main	0	
	Printed	4809	1 DOW - Alvarez	1	REPRINT
	Shipped	494	Teast Warehouse	1	REPRINT
	Pending Inventory	0	1 Israel	1	REPRINT
	VTM		TR Main	0	
			The Main	66	REPRINT
	Incomplete	0	TestWarehouse	0	
	Pending	0	Modere Test Warehouse	0	
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	Cancelled	8		14	ner him
Invoices	CC Pending	0	T Returns	0	
	ACH Pending	0	1 Singapore	1	REPRINT
G	Printed	2	Test	1	REPRINT
<u> </u>	Shipped	2	Test Warehouse 1	0	
	Pending Inventory	0	Thaitand	1	REPRINT
	a second s			2	REPRINT
	Australia		Test @	0	
The second second	Incomplete	5	Warehouse Test	0	
Commission	Pending	7	Warehouse Test	0	
	CC Declined	1	A West Whitehouse	1	DEDDUAT.
Administration	Cancelled	33	III West Warehouse		RENUM
	CC Pending	0	T Will Call Warehouse	0	
Powered by	ACH Pending	0			
exico	Accepted	0	REPRINT INVOICES		
9-	Printed	18			

STEP 2: Click on "Create New Batch" next to the Accepted Invoices. The following pop up will be displayed:



۲	Include all accepted orders	
0	Only include accepted orders with shipping method:	
	FedEx Ground 🔹	
0	SETUP CUSTOM BATCH FILTER	
~		

The most common way to create an invoice batch is to choose "Include all accepted orders".

Exigo also has the option to choose accepted orders by Shipping Method. This would be used in the event you have Overnight Shipping vs Ground Shipping. Obviously, the Orders with Overnight Shipping would need to be batched and shipped first.

Exigo has other filter options that are available. This can be discussed.

For this test, I'm going to choose "Include all accepted orders" and click "OK".

The following screen will pop up:

BATCHES	ORDERS	TOTAL	
역 <u>66</u>	3	238.4400	ē prin

STEP 3: From this screen, you may select "Print Batch". A User at your Warehouse should have access to do this directly. The following screen will be displayed showing all invoices to be printed. Click "Print".





View Batch Detail	:: ×
Invoice Packing Slip	
Print Invoice 9829853	Î
🕸 exigo demo	
: FedEx Ground	~
	CLOSE

STEP 4: After refreshing your screen, you should notice the following: The Order Batch numbers on the right side of the page should increase by 1 batch. There is also an option from this page to "Reprint" the invoices.

Home >	Invoices			SORT	BY (CC DECLINED) +
Customer >	Main		Order Batches		
Tanking the second second	The second se	Name 1	DESCRIPTION	BATCH TOTAL	
Accounting	Deption	221	1	1	
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Accounting Overview	CC Pending ACH Panding	9	Conterences	0	
	Accepted	2	Trossroads Main	0	
	Printed	4809	TOW - Alvarez	1	REPRINT
	Shipped	494	Teast Warehouse	1	REPRINT
Vendors.	Pending Inventory	0	Tisrael	1	REPRINT
			KR Main	0	
	VTM		A Main	66	REPRINT
	Incomplete	0	ManTaethMatehouse	0	
tiens	Pending	0	I man conversion	0	
	CC Declined	2	T Modere Test Warehouse	0	
	ACH Declined	0	Tenewais.	14	REPRINT
	CC Pending	8	Returns	0	
Involces	ACH Pending	0	Singapore	1	REPRINT
Name of	Accepted	0	A wa		and and a
	Printed	2	1 665L	1	REPRINT
	Shipped	2	Test Warehouse 1	0	
Commissions	Pending Inventory	0	Thailand	1	REPRINT
-	A second to a		TTM 2	2	REPRINT
	Australia		👚 Warehouse Test	0	
transfer to the second	Incomplete	5	The Warehouse Test	0	
Commission	Pending	7	Marehouse Test	0	
	CC Declined	1			
Administration	ACH Decined	0	T west warehouse	1	REPRINT
	CC Pending	0	T Will Call Warehouse	0	
Powered by	ACH Pending	0			
♦ exino	Accepted	0	REPRINT INVOICES		
P Chigo	Printed	18			

NOTE: THESE STEPS MAY BE PERFORMED THROUGHOUT THE DAY BASED ON YOUR BUSINESS RULES FOR FULFILLMENT.