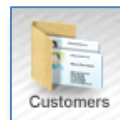# *How to Build and Manage Master Invoices*

Objectives

This guide will help you to:

- Generate a new master invoice
- Add and remove order invoices from a master invoice
- Name a master invoice
- Email or print a master invoice

Accessing Master Invoices

1. Log in administratively to your site.

2. Click the **Customers** icon in the top navigation bar.

3. Search and find the customer who needs a master invoice created, and then click **Customer Information**.
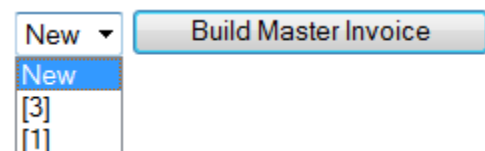
4. Click **Master Invoice**.
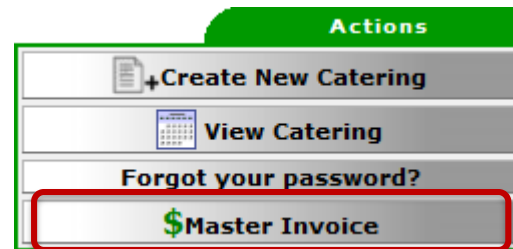
Add Order Invoices to a Master Invoice

1. Under **Ungrouped Orders**, check the boxes next to the orders you would like to add to a master invoice.

2. From the dropdown next to the **Build Master Invoice** button, select either **New** or the name of a preexisting master invoice. The order invoice(s) selected in the previous step will be added to a new or existing master invoice accordingly.

3. Click **Build Master Invoice**.
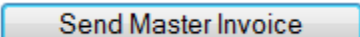
Remove Order Invoices from a Master Invoice

1. Under a master invoice, check the boxes next to the order invoices you wish to remove from the master invoice.

2. Click the **Update** button that appears to the right of the master invoice name. Update

Name / Rename a Master Invoice

1. In the textbox next to the master invoice header, type the name you wish to give this master invoice.

2. Click **Update**.

Master Invoice #1 | [   ] Update ✉ 🖨

Email a Master Invoice

1. Click the **Email** icon ✉ next to the master invoice name.

2. If necessary, edit the **First Name**, **Last Name**, and **Email** information (these should already be filled in with the customer's information).

3. Enter a **Subject** name for the email.

4. If desired, add text to the email.

5. Click **Send Master Invoice**. Send Master Invoice

Print a Master Invoice

1. Click the **Printer** icon 🖨 next to the master invoice name.

2. Via your Internet browser, print the page.