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When I click on Create Shipment, why doesn't the invoice always appear in a tab?

Megan De Freitas - 2025-07-10 - FAQ

When creating an invoice from the Invoicing plugin on a sales document, there is a button labeled "Open New Shipment" in the menu. It toggles on and off. When it is activated, it has a highlighted box around it. If you click on it again, the highlight disappears and the invoice will not pop up automatically after creating the shipment. The selection made on this screen will apply to the Invoice button on the sales document ribbon as well.

Steps to change this setting

Open the invoicing plugin from a sales document.

🤱 Customer Search 🗵 🐉 Security Editor 🖾 🦃 Settings 🖾 🛄 Sales Monitor 🗵 🔫 Sales Document Workflow Setup 🗵 🌡 Customer: [AAR							
📑 Close 🛛 📙 Save 🛛 😂 Print			🔰 💥 Delete 🛛 🗅 Copy 💧 Allocate 🛛 🛞 Una	Ilocate 🏄 Dynamics GP 📃 Z-US\$ 👻			
Document Properties		\$	Retrieve PayLink				
Document #:	ument #: ORDST2240		Create PayLink	ORDER (STDORD)			
Customer #:	AARONFIT0001		Cancel PayLink	Aaron Fitz Electrica			
Cust PO:	Cust PO:		Invoicing		Sales Rep:	PAUL W.	
Reg Ship:	Req Ship: 4/29/2025 Ship Method: LOCAL DELIVERY			·	Sales Terr:	TERRITORY 1	
Ship Method:			PayFabric Charge	·	Pay Terms:	CREDIT CARD	
Whse:	WAREHOUSE	÷	Update Rental Items (Beta)	·	Doc Date:	4/30/2025	
Currency:	Z-US\$		Sales Document Convert To BOM	·	Created By:	sa	
		A	Create Assembly				
			Payment				
		1	Avatax Commit Tax				
			Run Script				

Click the "Open New Shipment" button to toggle the option. (Surrounded by a blue box means the invoice will automatically open after the shipment is created)

ales Doc: 080512 oc Date: 4/30/202		Ship Method LOCAL DELIVER	,		Customer: AARONFIT0001				
		Ship Method LOCAL DELIVER	r						
oc Date: 4/30/202		es Doci (<u>50.051243</u> Chile: 4/30/2025 Res Ship: 4/29/2025					11	W CONTACT TEST 403 45 St. South	P
	10			0	icago, 1l. 60603-0776				
Ship Complete 0, 2312 555-0.02								(
Separate Thems (Au.) [() Versioner (b) Software (b) Software (b) (1)									
m Number	Item Description	Ship Method	Reg Ship Date	Whee	Unit Price	Qty	Qty BO	Qty Pulfiled UC	OFM Ship
CS-HDS-1EAR	Headset-Single Ear	LOCAL DELIVERY	4/29/2025	WAREHOUSE	80.00	1	0	1 Ea	ach .

Depending on the selection here, the functionality will also affect the invoice button on sales documents.

				🕞 Invoice
Additional Prop	perties	Totals - GM: [\$16,137.18] [50.10%]		
Batch/Q:	COMBINE		Misc Charge:	\$1033.50
Price Level:	RETAIL	\sim	Discount:	\$0.00
			Discount %	0.00%
1	Hold: APPROVAL		Freight:	\$0.00
			Tax:	\$2312.35
			Total:	\$35555.70
			Payment:	<u>0.00</u>
		Accept Payment		