

Invoice Flow Overview

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- Pre Pay Customers
 - Pre Pay Customers - Credit Card Payment Method
 - Pre Pay Customers - Check or Wire Payment Method
- Credit Terms Customers

Order and Invoice flow

- You place a order with sangoma by emailing our Order desk if you are setup for this process and we will input the order into the Sangoma Portal or placing your order directly in the Sangoma Portal yourself at <http://portal.sangoma.com>
- You can review this wiki on how to [Place Orders in the Sangoma Portal](#)
- Once you order is placed in the Sangoma Portal the following flow happen depending on what payment options you picked.

Pre Pay Customers

Pre Pay Customers are any Customers that have not had Credit Terms approved by Sangoma Finance team. On the checkout page of the Sangoma Portal if your account is not setup with Terms you will not see a option to place a order under Terms and are considered a Pre Pay Customer and fit into the Order Flow defined here.

At order time when you place your order and you are not a Customer established with Credit Terms you have options on Check out between paying with Credit Card, Mailing a Check or Making a Wire Transfer

Pre Pay Customers - Credit Card Payment Method

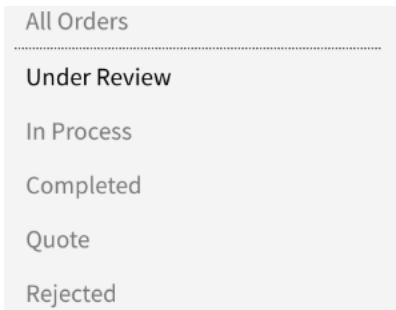
- On the checkout page of the Sangoma Portal you will see the following Payment options if you are a Pre Pay Customer

Payment Method

- Credit Card
- Wire Transfer
- Check
- Quote

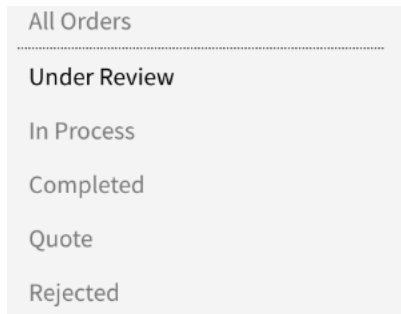


- At order time we do a capture of the full amount of the Order and Shipping on your credit card and apply it as a pending payment onto your Order. The Order will enter the Status in our Portal as In Process under the Orders Tab.

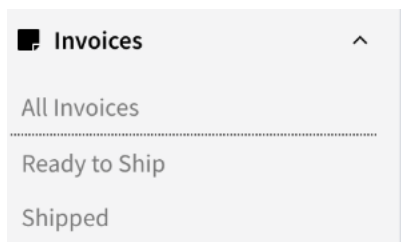


- When the order is full-filled 1 or more invoices will be created and the Credit Card capture we did on your order at the time your placed your order will be applied to the invoice(s) as a payments.
 - If your order is for only software and/or support and services the order will auto create the invoice and auto complete the order and apply the payment at the time you place the order.
 - If your order is for hardware and also includes software and/or support and services the order will be queued up in the In Process tab and once the hardware is allocated for your order and serial numbers are added to your hardware items the system will create a Invoice and auto complete your order and apply the payment it captured at order time to your invoice.
 - Generally a single order will create a single invoice expect in the cases below.

- If their are hardware items to ship on the invoice and some of the items are on backorder you will see more than 1 invoice generated as we only generate a invoice at fulfillment time as they ship the product to you.
- If their are hardware items to ship on the invoice and we have to ship the hardware from 2 different Sangoma facilities a invoice from each facility for the items they shipped will be generated against your order.
- Once the order is 100% full-filled your Order will change to a status of Completed in our Portal under the Orders Tab.



- Once a invoice has been created you can view the invoice in the Invoice Tab

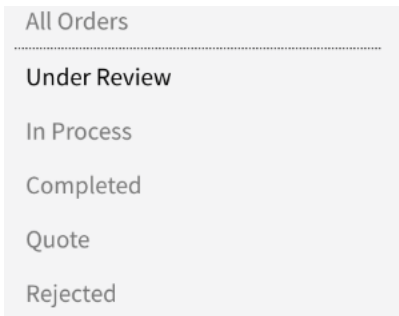


- We have 2 different statues a invoice can be under
 - Ready to Ship - Invoice that has had hardware allocated against the order but waiting for Tracking information to be added to the invoice.
 - Shipped - Invoice that has been shipped and completed.
- On the checkout page of the Sangoma Portal you will see the following Payment options if you are a Pre Pay Customer

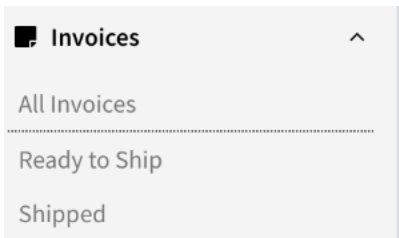


Pre Pay Customers - Check or Wire Payment Method

- At order time if you pick the Option of Wire or Check on checkout your order will be placed and enter the Status in our Portal as Waiting Payment. (See this wiki on [Making Pre-Payment on Orders](#))
- The order will not move into the In Process Status until payment has been received by Sangoma
- Once the Check or Wire payment is received by Sangoma Finance team the order will have the payment posted against the order as a Pending Payment which will cause the order to move forward into the In Process status.
- When the order is full-filled 1 or more invoices will be created and the payment against the order above will be applied to the invoice(s) as a payments.
 - If your order is for only software and/or support and services the order will auto create the invoice and auto complete the order and apply the payment at the time the payment is applied from Finance to your order.
 - If your order is for hardware and also includes software and/or support and services the order will be queued up in the In Process tab and once the hardware is allocated for your order and serial numbers are added to your hardware items the system will create a Invoice and auto complete your order and apply the payment to your invoice.
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 - If their are hardware items to ship on the invoice and some of the items are on backorder you will see more than 1 invoice generated as we only generate a invoice at fulfillment time as they ship the product to you.
 - If their are hardware items to ship on the invoice and we have to ship the hardware from 2 different Sangoma facilities a invoice from each facility for the items they shipped will be generated against your order.
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Credit Terms Customers

Terms Customers are any Customers that have had Credit Terms approved by Sangoma Finance team. On the checkout page of the Sangoma Portal if your account is setup with Terms you will see an option to place an order under Terms and are considered a Terms Customer and fit into the Order Flow defined here.

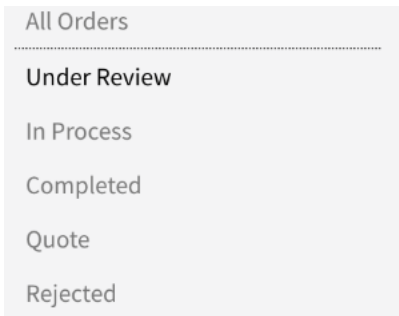
- At order time if you are a customer that has approved Credit Terms with Sangoma you can pick the Terms option as your payment option.

Payment Method

- Credit Card
- Wire Transfer
- Check
- Terms
- Quote



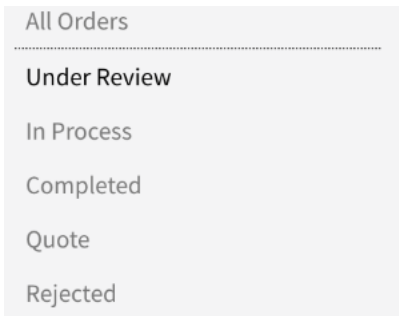
- The Order will enter the following two statuses.
 - In Process
 - You have no Past Due invoices
 - This order you are placing will not cause your total unpaid invoices plus any pending orders and this order's total dollar amount to exceed your approved Credit Limit amount.
 - Under Review
 - You have 1 or more invoices that are past their due date
 - This order you are placing will cause your total unpaid invoices plus any pending orders and this order's total dollar amount to exceed your approved Credit Limit amount.
 - Until you get these two conditions resolved your order generally will not be processed and will wait on hold.



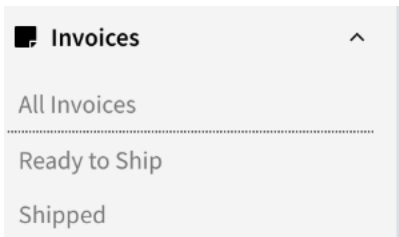
- When the order is full-filled 1 or more invoices will be created with the Due Date set based on your approved Credit Terms.
 - If your order is for only software and/or support and services the order will auto create the invoice and auto complete the order.
 - If your order is for hardware and also includes software and/or support and services the order will be queued up in the In Process tab and once the hardware is allocated for your order and serial numbers are added to your hardware items the system will create a Invoice.

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 - Shipped - Invoice that has been shipped and completed.
- To make payment on invoices please see this [wiki on Making Payments](#).