Shipping - Create Invoice Based on Cost

🔗 Backups	https://drive.google.com/file/d/1QCAyK7E_qpGt-tsbMteXFR24kWDtYo2r/view?usp=drive_link
☰ Category	Accounting Logistics Order Management
☰ Failiure Impact	Manual Updating Required Revenue Lost Slower Processing
☰ Involved Softwares	Gmail Monday.com Quickbooks
☰ Link/Automation ID	Part 1 Part 2
⊙ Manual Process Replaced?	Fully Automated
☰ Notes	Creates a shipping invoice with a 20% markup based on the cost of the shipment.
☰ Outputs	Sends Email Updates Order Management
⊙ Platform	Make.com
⟳ Status	Live
⊙ Trigger Source	Webhook

Shipping Invoice Generation Automation

Overview

This automation is responsible for **automatically generating shipping invoices**.

It is a **separate automation** from fulfillment and completion checks, but it is **triggered during the label booking process**.

🎯 Purpose

- Automatically create a shipping invoice

- Apply a **20% markup** to shipping cost

- Ensure customers exist in accounting before invoicing

- Eliminate manual invoice creation

🔗 Where This Automation Is Triggered

- Triggered **inside the Label Booking Automation**

- Runs **as soon as the shipment cost is populated**

This means:

- Label booking → cost is known → invoice automation fires

🔔 Trigger Condition

The automation starts when:

- The **Shipment Cost column changes**

Once the cost is detected, the automation immediately executes.

💰 Pricing Logic

- The automation:

  - Reads the **actual shipping cost**

  - Multiplies it by **1.2**

- Result:

- **20% markup** is applied automatically

- This becomes the invoiced shipping amount

🔄 Automation Flow

1. Shipment cost is entered or updated

2. Automation detects the column change

3. The system:

   - Identifies the related item

   - Looks up the customer in **QuickBooks**

4. Customer handling:

   - If customer exists → use existing record

   - If customer does not exist → create new customer

5. Invoice is generated using the marked-up amount

6. Invoice is issued and associated with the shipment

📄 What This Automation Does

✅ Creates the **shipping invoice**

✅ Applies correct markup

✅ Ensures customer exists in accounting

✅ Runs automatically without user input

🚫 What This Automation Does *Not* Do

- ❌ Does **not** check whether the invoice has been paid

- ❌ Does **not** control fulfillment or completion status

Those checks are handled by **separate automations** in the shipping workflow.

📬 Invoice & Label Confirmation

- Generated invoices and labels are:

    - Emailed automatically

    - Viewable directly in email

- Successful invoice creation confirms the automation ran correctly

🧠 Key Characteristics

- Event-driven (column change)

- Runs in real time

- Fully automated

- Integrated with accounting

- Designed to be modular and independent

For More Info Please Refer to page below:

New Shipping Board & Blindshipping Guide