

Blindshipping - Create invoice based on Cost

🔗 Backups	https://drive.google.com/file/d/186mwDhOClx995GbzaII87Ul6p8XV0-pf/view?usp=drive_link
☰ Category	Accounting Logistics Order Management
☰ Failure Impact	Manual Updating Required Revenue Lost Slower Processing
☰ How could it be better	Build on N8N to save ops
☰ Involved Softwares	Gmail Monday.com Quickbooks
☰ Link/Automation ID	https://us1.make.com/3645/scenarios/3501200/edit
⌚ 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**, but it is **triggered during the Label Booking process** as part of Shipping 2.0.

Its job is to calculate markup, ensure the customer exists in accounting, and create the invoice.

Purpose

- Automatically generate shipping invoices
 - Apply a **20% markup** to shipping costs
 - Ensure customers exist in accounting
 - Remove manual invoice creation from the workflow
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Where This Automation Is Triggered

- Triggered **inside the Label Booking Automation**
- Runs **immediately when the shipment cost is entered**

This means:

| Label booking → shipment cost known → invoice automation fires

Trigger Condition

The automation runs when:

- The **Shipment Cost column changes**

This column represents the **actual cost** paid for shipping.

Pricing & Markup Logic

- The automation:
 - Reads the raw shipment cost
 - Multiplies it by **1.2**
 - Result:
 - A **20% markup** is automatically applied
 - The final value is used for invoicing
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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 the customer exists → use existing record
 - If the customer does not exist → create a new customer
 5. The shipping invoice is generated using the marked-up cost
 6. Invoice is sent and linked to the shipment
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What This Automation Does

- Creates a shipping invoice
 - Applies correct markup automatically
 - Creates customers in accounting if missing
 - Runs without manual intervention
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What This Automation Does **Not** Do

- Does **not** check whether the invoice has been paid
- Does **not** mark shipments complete

Those responsibilities are handled by **separate completion automations**.

Invoice Confirmation

- Generated invoices are:
 - Sent via email
 - Viewable directly in the inbox
- Successful invoice delivery confirms:
 - The automation executed correctly

- Accounting records were created or reused as expected
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Key Characteristics

- Event-driven (column change-based)
- Runs in real time
- Modular and independent
- Integrated directly with accounting
- Designed to fail safely if data is missing