

Multi Stage Invoicing

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Multi-Stage Invoices are used when a customer is billed in multiple stages rather than receiving a single invoice. For example, a customer may be invoiced for **50% of the total amount when the order is placed** and the remaining **50% upon delivery**.

Note: This functionality is controlled by parameter settings in RentalPoint. For information on enabling and configuring Multi-Stage Invoices, refer to the **Multi-Stage Invoice Setup** section below.

Adding an Invoice Stage

Open the booking to the payments tab, then follow the instructions below

The screenshot displays the RentalPoint software interface. On the left is a dark sidebar with navigation icons for Customer, Calendar, Equipment, Crew, Venue, Notes, Financials (highlighted with an orange arrow), Attachments, Status, Other details, and Follow up. The main content area is divided into two panels. The left panel, titled 'Financials', contains fields for Invoice #, Invoice Date, Paid (checkbox), Comment, Balance, and Total Price (467.5). The right panel, titled 'Payment', contains fields for Payment Terms (set to '*Cash on delivery'), Payment Options (set to 'Prompt for Payment on Invoicing'), Payment method, Surcharge % (0), and Authorised by. Below these panels is a section for 'Terms for multiple stage invoicing' with a dropdown menu currently set to '<none>'. A green '+' button with an orange arrow pointing to it is located next to the dropdown. At the bottom right, there is a 'Credit card Information' section with an information icon (i) and a '+' button.

Choose to calculate each invoice stage by amount or percentage, then click NEW to add a stage

Setup Payment Terms

☐ Use Amount ☒ Percentage

Toggle between
amount or
percentage for
stage calculation

Stage No.	Stage Name	Due Date	Percent	Amount	Invoiced	Invoice No.	Invoiced Amount
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Amount yet to apply

100 %

Total

100 %

+ New

[What is this?](#)



Click New to add a stage



Complete the stage information and save

Setup Payment Terms

☐ Use Amount ☒ Percentage

Stage No.	Stage Name	Due Date	Percent	Amount	Invoiced	Invoice No.	Invoiced Amount
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Invoice Stage Name

Due Date

Percentage

Deposit

08/07/2026

50 %

Amount yet to apply

Total

100 %

100 %

Save

Cancel

What is this?

Continue adding stages until the full amount of the booking has been accounted for

Setup Payment Terms

☐ Use Amount ☒ Percentage

Stage No.	Stage Name	Due Date	Percent	Amount	Invoiced	Invoice No.	Invoiced Amount
1	Deposit	2026/08/07	50	233.75	N		
2	Balance	2026/08/31	50	233.75	N		

Amount yet to apply

0 %

Total

100 %

+ New

 Edit



Delete

[What is this?](#)



Once the stages have been added they will display in the booking

MRCI00022 0 - EAST 0 - Toronto

Financials

Invoiced Amount: 0 Paid Amount: 0

Exported: ☐

Comment: **Multiple stage invoicing**

Balance

Total Price: 467.5

Payment

Payment Terms: *Cash on delivery

Payment Options: Prompt for Payment on Invoicing

Payment method: Surcharge %: 0

Authorised by:

Terms for multiple stage invoicing: 50 % / 50 %

Invoice Stage	Due Date	Percent	Amount	Invoiced	Invoice No.	Invoiced Amount	Invoiced Date	Exported	Paid
Deposit	2026/08/07	50.000	233.75	No	0	0	1980-01-01	☐	☐
Balance	2026/08/31	50.000	233.75	No	0	0	1980-01-01	☐	☐

Invoice a Booking Stage

Highlight the booking, then select the print invoice option

RentalPoint3 DB [12.1.11.0] Rev [8046]

Bookings Control panel

Current search text Booking No.

New Open View Work Admin Financials Print Others

Booking	Organisation	
MRCI00022	MRC Industries	- Invoice - Pick List - Delivery Sheet

Select your template type, usually RTF



Select template type?

Fast Report template

RTF Document Template

Then check the box to the left of the stage being invoiced and click the green checkmark to proceed.

Invoice stages

Stage Name	Invoiced	Stage Amount	Invoiced Amount
☒ Deposit	☐	233.75	0.00
☐ Balance	☐	233.75	0.00

Select RTF Template

Deposit Invoice_GdocsF.rtf

Final Invoice_SepLabour_GdocsF.rtf

Invoice.rtf



E AV LLC
P.O. Box 126b
Phoenix, AZ 81051
Ph: (800) 123-4567
Fax: (624) 123-4568

Deposit Invoice: 494
Job: MRCI00022
Date: 26/08/07
P.O. #:
Ship to: Avonmore Hotel
Mississauga ON
K0K 4T3

Attn:

INVOICE TO
Tower View
Tom Flaherty
5489 West 74th Street
Toronto
H0R 3L9

Salesperson	Date Complete	Job Description	Terms
Molly Brown	26/08/01		*Cash on delivery

Summary Of Charges

Equipment Total:	425.00
Re-Sales total:	0.00
Labor Total:	0.00
Total Discount:	0.00
Total Charges:	323.75

This order requires a deposit of 50%

Please remit 233.75 upon receipt of this invoice.

Total Due: 233.75

Customer Name (please print):

The Financials tab of the booking displays details of the invoiced stage

MRCI000220 - EAST0 - Toronto

Financials

Invoiced Amount233.75Paid Amount:0

Exported☐

Comment: Multiple stage invoicing

Balance

Total Price467.5

Payment

Payment Terms*Cash on delivery

Payment OptionsPrompt for Payment on Invoicing

Payment methodSurcharge %0

Authorised by

Terms for multiple stage invoicing50 % /50 %

Invoice Stages

Invoice Stage	Due Date	Percent	Amount	Invoiced	Invoice No.	Invoiced Amount	Invoiced Date	Exported	Paid
Deposit	2026/08/07	50.000	233.75	Yes	494	233.75	2026-08-07	☐	☐
Balance	2026/08/31	50.000	233.75	No	0	0	1980-01-01	☐	☐

Credit card Information

When the Booking Price Changes After Invoicing

If the booking price changes after one or more stages have already been invoiced, the remaining uninvoiced stages are automatically adjusted to reflect the additional amount. This ensures that the total value invoiced across all stages matches the updated booking price.

MRCI000220 - EAST0 - Toronto

Financials

Invoiced Amount233.75Paid Amount:0

Exported☐

Comment: Multiple stage invoicing

Balance

Total Price500.5

Payment

Payment Terms*Cash on delivery

Payment OptionsPrompt for Payment on Invoicing

Payment methodSurcharge %0

Authorised by

Terms for multiple stage invoicing

46.7 % /53.3 %

Invoice Stages

Invoice Stage	Due Date	Percent	Amount	Invoiced	Invoice No.	Invoiced Amount	Invoiced Date	Exported	Paid
Deposit	2026/08/07	46.703	233.75	Yes	494	233.75	2026-08-07	☐	☐
Balance	2026/08/31	53.297	266.75	No	0	0	1980-01-01	☐	☐

Modify an Uninvoiced Stage

First edit the payment terms

Terms for multiple stage invoicing

47.75 % /52.25 %

Add or Edit payment terms

Invoice Stages

Invoice Stage	Due Date	Percent	Amount	Invoiced	Invoice No.	Invoiced Amount	Invoiced Date	Exported	Paid
Deposit	2026/08/07	47.753	233.75	Yes	494	233.75	2026-08-07	☐	☐
Balance	2026/08/31	52.250	255.75	No	0	0	1980-01-01	☐	☐

Credit card Information

Then highlight any uninvoiced line to make the necessary changes

Setup Payment Terms

☐ Use Amount
 ☒ Percentage

Stage No.	Stage Name	Due Date	Percent	Amount	Invoiced	Invoice No.	Invoiced Amount
1	Deposit	2026/08/07	46.7032967032967	233.75	Y	494	233.75
2	Balance	2026/08/31	53.2967032967033	266.75	N		

Amount yet to apply

Total

0 %

100 %

+ New

 Edit

↑

↓

 Delete

[What is this?](#)



RTF Insert Fields

Use the insert fields below in your RTF templates to show stage invoice information from a booking.

Invoice Stage Name	&stgNameC&
Amount Due for Invoice Stage	&stgAmtDN&
Pre Tax Amt for Invoice Stage	&stgPreTN&
Tax 1 For Invoice Stage	&stgTax1N&
Tax 2 For invoice Stage	&stgTax2N&



E av LLC
P.O. Box 126b
Phoenix, AZ 81051
Ph: (800) 123-4567
Fax: (624) 123-4568

Deposit Invoice:

Job:

Date:

P.O. #:

Ship to:

Attn:

&INVTN&

&bookNoC&

&INVDATEN&

&orderNoC&

&delToC&

&dadrl2C& &dadrl3C& &VNSTATEC&

&VNPOCDEC&

&VcontC&

INVOICE TO

&WBORG&

&WBCONT&

&WBADD1C&

&WBADD3C&

&WBPOCODC&

&CONMTOSC&

Salesperson

&BSALESPC&

Date Complete

&retdateN&

Job Description

&SHOWNAMC&

Terms

&paytermC&

Summary Of Charges

Equipment Total:

&eqtotdN:14:2&

Re-Sales total:

&SALESTDN:14:2&

Labor Total:

&labourN:14:2&

Total Discount:

&DiscGraN:14:2&

Total Charges:

&TotalN:14:2&

This order requires a deposit of 50%

Please remit &stgAmtDN& upon receipt of this invoice.

Total Due: &stgAmtDN&

Customer Name (please print):