HIGH-LEVEL DESIGN DOCUMENT

COMPREHENSIVE TECHNICAL SPECIFICATION

# Invoice

System Name: invoice

Version: 2.0

|  |  |
| --- | --- |
| **Document Version** | 2.0 |
| **Server** | https://demo-aus.sharedo.tech |
| **Work-Type Category** | Business Process |
| **Owner** | System Administrator |
| **Status** | Active |
| **Created Date** | 8/17/2025, 12:09:25 AM |
| **Document ID** | HLD-invoice-1755353365852 |

Classification: Internal

Confidentiality: Confidential

Generated by ShareDo VS Code Extension

8/17/2025

# Table of Contents

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# 1. Executive Summary

This document provides a comprehensive high-level design for the Invoice work-type within the ShareDo platform, including detailed technical specifications, phase models, triggers, workflows, and security configurations.

## 1.1 Document Scope

This document covers:

* • Complete work-type configuration and properties
* • Title and reference generation patterns
* • Phase models with transitions and guards
* • Triggers and workflow automation
* • Key dates and time-based actions
* • Security roles and permissions
* • Business rules and validations

# 2. System Overview

## 2.1 Work-Type Details

|  |  |
| --- | --- |
| **Name** | Invoice |
| **System Name** | invoice |
| **Description** | An invoice is a specialist sharedo type to facilitate the capture and processing of any payments to be received on a case. An Invoice instance can be created manually or systematically. |
| **Category** | Business Process |
| **Version** | 1.0.0 |
| **Owner** | System Administrator |
| **Active** | Yes |
| **Abstract** | Yes |
| **Core Type** | No |
| **Has Portals** | No |
| **Icon** | fa-money |
| **Tile Color** | #000000 |
| **System Path** | /invoice/ |
| **Tags** | workflow, automation |

## 2.2 Derived Types

The following work-types inherit from this type:

* • Debt Tranche (invoice-debt-recovery)
* • Invoice - Fees (invoice-general)
* • Payment Expectation - Recovery (invoice-settlement-recovery)
* • Payment Expectation - Settlement (invoice-settlement)

# 3. Title and Reference Configuration

# 4. Phase Model and Transitions

# 5. Triggers and Automation

# 6. Key Dates Configuration

# 7. Workflow Documentation

# 8. Security Model and Permissions

# 9. Business Rules

# 10. Forms and Templates

No forms configured for this work type.

# 11. Integration Architecture

This work-type supports the following integration capabilities:

* • REST API endpoints for CRUD operations
* • Webhook notifications for state changes
* • Event-driven architecture for real-time updates
* • Batch processing capabilities
* • External system integration via triggers

# Appendices

## A. Glossary

Work-Type: A template that defines the structure and behavior of work items.

Phase Model: Defines the lifecycle stages of a work item.

Phase Guard: Conditions that must be met for phase transitions.

Trigger: Automated action based on events or conditions.

Key Date: Important date fields that drive business processes.

Participant Role: A defined role with specific permissions.

## B. Document History

Version 2.0 - 8/17/2025

* • Initial comprehensive documentation
* • Included all configuration details
* • Added phase models and workflows