User Manual for the Web Application for Invoice Creation

Introduction

Our web application for invoice creation is designed to make managing your invoices simple and efficient. This manual will guide you through the main features of the application, describing the necessary steps to use them.

Accessing the Application

To start, open your web browser and navigate to the address provided by your company. You will see the login screen where you need to enter your username and password. After logging in, you will be directed to the main screen of the application.

Interface Overview

Once inside, you will notice several sections in the user interface. At the top, the navigation bar allows you to quickly access different areas of the application, such as creating new invoices and settings. In the center of the screen, the dashboard provides an overview of recent activities and important statistics. On the left, the sidebar contains links to specific features like user preferences, print management, and the invoice list.

Setting User Preferences

To set or modify user preferences, you need to access the "Settings" section in the sidebar. Here you can update your profile information, such as name, email, and password. Additionally, you can configure display preferences by choosing the date and currency format and set up email notifications to receive important updates. After making the changes, remember to click "Save Preferences" to apply them.

Setting Print Preferences

To configure print settings for invoices, go to the "Print" section accessible from the sidebar. Here you can choose your preferred print layout, decide which information to include in the prints, such as the company logo, header, and footer, and adjust print settings like margins and page orientation. Once you have made the changes, click "Save Settings" to ensure your preferences are applied.

Creating a New Invoice

To create a new invoice, you need to click on "New Invoice" in the navigation bar. This will take you to a new screen where you can fill in the required fields, such as the customer's name, invoice date, and payment details. After entering this information, you can add the invoice line items by entering descriptions, quantities, and prices. Once you have completed the entry, review the invoice summary to ensure all information is correct and finally click "Save" to create the new invoice.

Editing an Existing Invoice

To edit an existing invoice, go to the "Invoice List" section in the sidebar. Once there, you can search for the invoice you want to edit using the search field or by scrolling through the list. When you have found the invoice, click on the edit icon next to it. This will take you to a screen where you can make the necessary changes to the desired fields. After making the changes, click "Save" to update the invoice.

Exporting Line Items

To export the line items of an invoice, you need to go to the "Invoice List" section from the sidebar. After selecting the invoice from which you want to export the line items, click on the export icon and choose the desired export format, such as CSV or Excel. Then follow the instructions to complete the export and download the file.

User Management

If you are an administrator, you can manage the users of the application by accessing the "User Management" section from the sidebar. Here you can add new users, modify the permissions of existing users, and remove users. To add a new user, click on "New User," fill in the required fields, and click "Save." To modify or remove a user, use the corresponding icons next to each username.

Support and Assistance

If you need assistance, you can access the "Support" section from the sidebar. Here you will find useful resources such as guides, FAQs, and the ability to contact the support team via email or chat. We are always available to help you with any issues or questions regarding the application.