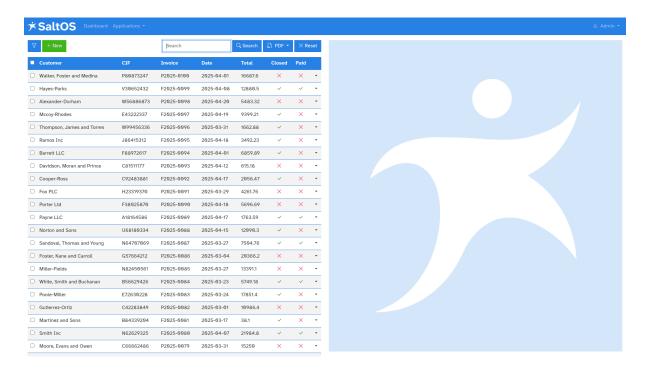# Invoices

Description

The Invoices application is used to issue and manage customer billing records. Each invoice contains product or service lines, quantities, unit prices, taxes, and discounts. This module supports both pro forma and finalized invoices, tracks payment status, and integrates with the Customers, Products, and Taxes modules. It also provides traceability for due dates, payment dates, and links to related documents.

List view

The following fields are displayed in the list view:

- Customer: The client who receives the invoice and is responsible for payment.

- CIF: The fiscal identification code of the customer at the time of invoicing.

- Invoice: The internal reference or invoice number assigned to the document.

- Date: The official issue date of the invoice.

- Total: The total amount due, including taxes and discounts.

- Closed: Indicates whether the invoice has been finalized and is no longer editable.

- Paid: Indicates whether the invoice has been marked as paid.

Form view

This view is used for creating, editing or viewing an invoice.

In **create** mode, the form is empty and allows the user to generate a new invoice, including pro forma invoices.

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▽ + New   [Search] 🔍 Search 📄 PDF ▾ ✕ Reset   ○ Closed   ○ Paid

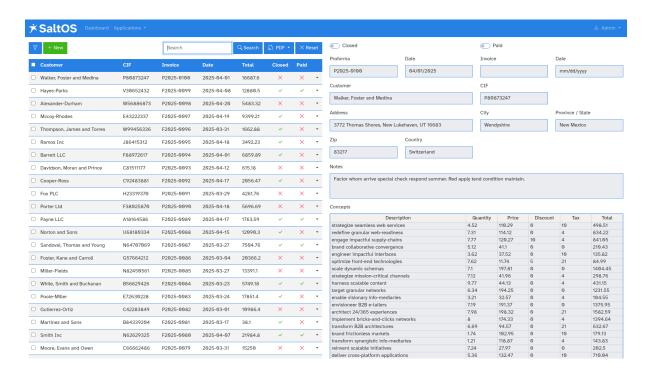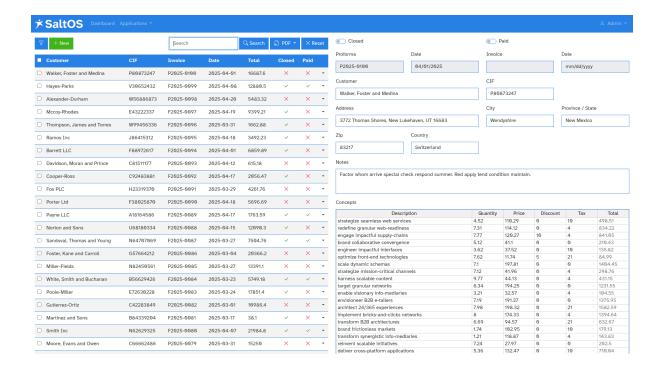| ☑ Customer	CIF	Invoice	Date	Total	Closed	Paid	
☐ Walker, Foster and Medina	P80873247	P2025-0100	2025-04-01	16687.6	✕	✕	▾
☐ Hayes-Parks	V30652432	F2025-0099	2025-04-08	12880.5	✓	✓	▾
☐ Alexander-Durham	W56886873	P2025-0098	2025-04-20	5483.32	✕	✕	▾
☐ Mccoy-Rhodes	E43222337	F2025-0097	2025-04-19	9399.21	✓	✕	▾
☐ Thompson, James and Torres	W99456336	F2025-0096	2025-03-31	1662.88	✓	✕	▾
☐ Ramos Inc	J86415312	F2025-0095	2025-04-18	3492.23	✓	✕	▾
☐ Barrett LLC	F88972617	F2025-0094	2025-04-01	6859.89	✓	✕	▾
☐ Davidson, Moran and Prince	C81511177	P2025-0093	2025-04-12	615.18	✕	✕	▾
☐ Cooper-Ross	C92483881	F2025-0092	2025-04-17	2056.47	✓	✕	▾
☐ Fox PLC	H23319370	P2025-0091	2025-03-29	4261.76	✕	✕	▾
☐ Porter Ltd	F38025870	P2025-0090	2025-04-18	5696.69	✕	✕	▾
☐ Payne LLC	A18164586	F2025-0089	2025-04-17	1763.59	✓	✓	▾
☐ Norton and Sons	U68180334	F2025-0088	2025-04-15	12090.3	✓	✕	▾
☐ Sandoval, Thomas and Young	N64707069	F2025-0087	2025-03-27	7504.76	✓	✓	▾
☐ Foster, Kane and Carroll	G57664212	P2025-0086	2025-03-04	20366.2	✕	✕	▾
☐ Miller-Fields	N82450561	P2025-0085	2025-03-27	13391.1	✕	✕	▾
☐ White, Smith and Buchanan	B56629426	F2025-0084	2025-03-23	5749.18	✓	✓	▾
☐ Poole-Miller	E72630228	F2025-0083	2025-03-24	17851.4	✓	✕	▾
☐ Gutierrez-Ortiz	C42283849	P2025-0082	2025-03-01	10986.4	✕	✕	▾
☐ Martinez and Sons	B84339204	F2025-0081	2025-03-17	38.1	✓	✕	▾
☐ Smith Inc	N62629325	F2025-0080	2025-04-07	21984.8	✓	✓	▾
☐ Moore, Evans and Owen	C66662486	P2025-0079	2025-03-31	15250	✕	✕	▾

Right panel (view mode):

Proforma [ ]   Date [mm/dd/yyyy]   Invoice [ ]   Date [mm/dd/yyyy]
Customer [ ]   CIF [ ]
Address [ ]   City [ ]   Province / State [ ]
Zip [ ]   Country [ ]
Notes [ ]
Concepts

Description	Quantity	Price	Discount	Tax	Total

Taxes

Tax	Base	Total

Totals

Subtotal	Tax	Total

Payment method [▾]   Due date [mm/dd/yyyy 📅]   Paid [ ]   Paid date [mm/dd/yyyy 📅]
Status [▾]
New files

In **view** mode, it shows a finalized invoice in read-only mode.

Right panel (edit mode):

Proforma [P2025-0100]   Date [04/01/2025]   Invoice [ ]   Date [mm/dd/yyyy]
Customer [Walker, Foster and Medina]   CIF [P80873247]
Address [3772 Thomas Shores, New Lukehaven, UT 16683]   City [Wendyshire]   Province / State [New Mexico]
Zip [83217]   Country [Switzerland]
Notes [Factor whom arrive special check respond summer. Red apply tend condition maintain.]
Concepts

Description	Quantity	Price	Discount	Tax	Total
strategize seamless web services	4.52	110.29	0	10	498.51
redefine granular web-readiness	7.31	114.12	0	4	834.22
engage impactful supply-chains	7.77	120.27	10	4	841.05
brand collaborative convergence	5.12	41.1	0	0	210.43
engineer impactful interfaces	3.62	37.52	0	10	135.82
optimize front-end technologies	7.62	11.74	5	21	84.99
scale dynamic schemas	7.1	197.81	0	0	1404.45
strategize mission-critical channels	7.12	41.96	0	4	298.76
harness scalable content	9.77	44.13	0	4	431.15
target granular networks	6.34	194.25	0	0	1231.55
enable visionary info-mediaries	3.21	32.57	0	4	104.55
envisioneer B2B e-tailers	7.19	191.37	0	0	1375.95
architect 24/365 experiences	7.98	198.32	0	21	1582.59
implement bricks-and-clicks networks	8	174.33	0	4	1394.64
transform B2B architectures	6.69	94.57	0	21	632.67
brand frictionless markets	1.74	102.95	0	10	179.13
transform synergistic info-mediaries	1.21	118.87	0	4	143.83
reinvent scalable initiatives	7.24	27.97	0	0	202.5
deliver cross-platform applications	5.36	132.47	0	10	710.04

In **edit** mode, it allows modifying a draft invoice or correcting information before finalization.

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Customer	CIF	Invoice	Date	Total	Closed	Paid
Walker, Foster and Medina	P80873247	P2025-0100	2025-04-01	16687.6	✗	✗
Hayes-Parks	V30652432	F2025-0099	2025-04-08	12880.5	✓	✓
Alexander-Durham	W56886873	P2025-0098	2025-04-20	5483.32	✗	✗
Mccoy-Rhodes	E43222337	F2025-0097	2025-04-19	9399.21	✓	✗
Thompson, James and Torres	W99456336	F2025-0096	2025-03-31	1662.88	✓	✗
Ramos Inc	J86415312	F2025-0095	2025-04-18	3492.23	✓	✗
Barrett LLC	F88972617	F2025-0094	2025-04-01	6859.89	✓	✗
Davidson, Moran and Prince	C81511177	P2025-0093	2025-04-12	615.18	✗	✗
Cooper-Ross	C92483881	F2025-0092	2025-04-17	2056.47	✓	✗
Fox PLC	H23319370	P2025-0091	2025-03-29	4261.76	✗	✗
Porter Ltd	F38025870	P2025-0090	2025-04-18	5696.69	✗	✗
Payne LLC	A18164586	F2025-0089	2025-04-17	1763.59	✓	✓
Norton and Sons	U68180334	F2025-0088	2025-04-15	12090.3	✓	✗
Sandoval, Thomas and Young	N64707069	F2025-0087	2025-03-27	7504.76	✓	✓
Foster, Kane and Carroll	G57664212	P2025-0086	2025-03-04	20366.2	✗	✗
Miller-Fields	N82450561	P2025-0085	2025-03-27	13391.1	✗	✗
White, Smith and Buchanan	B56629426	F2025-0084	2025-03-23	5749.18	✓	✓
Poole-Miller	E72630228	F2025-0083	2025-03-24	17851.4	✓	✗
Gutierrez-Ortiz	C42283849	P2025-0082	2025-03-01	10986.4	✗	✗
Martinez and Sons	B84339204	F2025-0081	2025-03-17	38.1	✓	✗
Smith Inc	N62629325	F2025-0080	2025-04-07	21984.8	✓	✓
Moore, Evans and Owen	C66662486	P2025-0079	2025-03-31	15250	✗	✗

Closed · Paid

Field	Value
Proforma	P2025-0100
Date	04/01/2025
Invoice	
Date	mm/dd/yyyy
Customer	Walker, Foster and Medina
CIF	P80873247
Address	3772 Thomas Shores, New Lukehaven, UT 16683
City	Wendyshire
Province / State	New Mexico
Zip	83217
Country	Switzerland

Notes: Factor whom arrive special check respond summer. Red apply tend condition maintain.

Concepts

Description	Quantity	Price	Discount	Tax	Total
strategize seamless web services	4.52	110.29	0	10	498.51
redefine granular web-readiness	7.31	114.12	0	4	834.22
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envisioneer B2B e-tailers	7.19	191.37	0	0	1375.95
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brand frictionless markets	1.74	102.95	0	10	179.13
transform synergistic info-mediaries	1.21	118.87	0	4	143.83
reinvent scalable initiatives	7.24	27.97	0	0	202.5
deliver cross-platform applications	5.36	132.47	0	10	710.04

The form includes the following fields:

- Closed: Indicates whether the invoice has been finalized and is no longer editable.
- Paid: Indicates whether the invoice has been marked as paid.
- Proforma: Reference or marker indicating the invoice originated from a pro forma.
- Date: The official issue date of the invoice.
- Invoice: The internal reference or invoice number assigned to the document.
- Customer: The client who receives the invoice and is responsible for payment.
- CIF: The fiscal identification code of the customer at the time of invoicing.
- Address: The customer's address used for invoicing purposes.
- City: City corresponding to the customer's invoicing address.
- Province / State: Province or state in the billing address.
- Zip: Postal code in the billing address.
- Country: Country included in the customer's billing information.
- Notes: Internal comments or conditions attached to the invoice.
- Concepts: List of items or services included in the invoice.
- Taxes: Breakdown of taxes applied to the invoice.
- Totals: Final financial summary: subtotal, tax, and grand total.
- Payment method: The method of payment selected for the invoice.
- Due date: The date by which the invoice should be paid.
- Amount paid: Amount received.
- Paid date: The date on which the payment was received.

- Status: Current status of the invoice (e.g., draft, closed, cancelled).
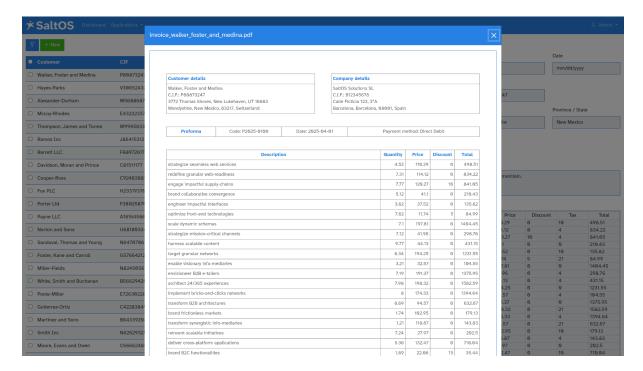
Invoices also include line items (product, quantity, price, discount, tax) and a breakdown of applied taxes.

Delete

Invoices can only be deleted if they are in draft status. A confirmation prompt is shown before the operation.

Once an invoice is finalized and/or linked to a payment, deletion is restricted.

PDF generation

From the individual view of a record (view), the user can generate and download a PDF containing all relevant data of that entry.

From the list view (list), it is possible to select multiple records using the checkboxes and generate a single PDF that includes all of them.

Widgets on the dashboard

The invoicing application ('invoices') publishes several widgets on the main dashboard to provide a real-time overview of the system's billing status.

The available widgets are:

- **Table 'last_7_invoices'**: shows the 7 most recent invoices, including key information such as customer, total amount, and payment status.
- **Chart 'invoice_total_by_day'**: displays the total amount invoiced per day, highlighting peaks and activity trends.

- **Chart 'invoice_avg_by_day'**: shows the average daily invoice amount, useful for evaluating consistency or seasonality.

- **Chart 'top5_customers_by_total'**: highlights the top 5 customers by billing volume, helping identify key accounts.

- **Chart 'invoice_paid_vs_pending'**: compares the number of paid vs. pending invoices, giving insight into payment flow.

- **Chart 'invoice_avg_days_to_pay'**: shows the average number of days customers take to pay their invoices, helping assess payment behavior.

These widgets offer useful visual insights for decision-making and allow continuous monitoring of the business's financial evolution.