

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

SaltOS

DashboardApplications

List - Invoices

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Customer	CIF	Invoice	Date	Total	Closed	Paid
<input type="checkbox"/> Walker, Foster and Medina	P80873247	P2025-0100	2025-04-01	16687.6	X	X
<input type="checkbox"/> Hayes-Parks	V30652432	F2025-0099	2025-04-08	12880.5	✓	✓
<input type="checkbox"/> Alexander-Durham	W56886873	P2025-0098	2025-04-20	5483.32	X	X
<input type="checkbox"/> McCoy-Rhodes	E43222337	F2025-0097	2025-04-19	9399.21	✓	X
<input type="checkbox"/> Thompson, James and Torres	W99456336	F2025-0096	2025-03-31	1662.88	✓	X
<input type="checkbox"/> Ramos Inc	J86415312	F2025-0095	2025-04-18	3492.23	✓	X
<input type="checkbox"/> Barrett LLC	F88972617	F2025-0094	2025-04-01	6859.89	✓	X
<input type="checkbox"/> Davidson, Moran and Prince	C81511177	P2025-0093	2025-04-12	615.18	X	X
<input type="checkbox"/> Cooper-Ross	C92483881	F2025-0092	2025-04-17	2056.47	✓	X
<input type="checkbox"/> Fox PLC	H23319370	P2025-0091	2025-03-29	4261.76	X	X
<input type="checkbox"/> Porter Ltd	F38025870	P2025-0090	2025-04-18	5696.69	X	X
<input type="checkbox"/> Payne LLC	A18164586	F2025-0089	2025-04-17	1763.59	✓	✓
<input type="checkbox"/> Norton and Sons	U68180334	F2025-0088	2025-04-15	12090.3	✓	X
<input type="checkbox"/> Sandoval, Thomas and Young	N64707869	F2025-0087	2025-03-27	7504.76	✓	✓
<input type="checkbox"/> Foster, Kane and Carroll	G57664212	P2025-0086	2025-03-04	20366.2	X	X
<input type="checkbox"/> Miller-Fields	N82450561	P2025-0085	2025-03-27	13391.1	X	X
<input type="checkbox"/> White, Smith and Buchanan	B56629426	F2025-0084	2025-03-23	5749.18	✓	✓
<input type="checkbox"/> Poole-Miller	E72630228	F2025-0083	2025-03-24	17851.4	✓	X
<input type="checkbox"/> Gutierrez-Ortiz	C42283849	P2025-0082	2025-03-01	10986.4	X	X
<input type="checkbox"/> Martinez and Sons	B84339204	F2025-0081	2025-03-17	38.1	✓	X
<input type="checkbox"/> Smith Inc	N62629325	F2025-0080	2025-04-07	21984.8	✓	✓
<input type="checkbox"/> Moore, Evans and Owen	C66662486	P2025-0079	2025-03-31	15250	X	X

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.

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

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

- 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

The screenshot displays the 'Modify Invoices' interface in SaltOS. On the left, a sidebar lists various customers with checkboxes for selection. The main area shows the details for the selected invoice, 'invoice_walker_foster_and_medina.pdf'. It includes sections for 'Customer details' and 'Company details', a 'Proforma' section with metadata like code, date, and payment method, and a table of line items. The line items table has columns for Description, Quantity, Price, Discount, and Total. At the bottom right, there is a summary table showing Price, Discount, Tax, and Total.

Description	Quantity	Price	Discount	Total
strategize seamless web services	4.52	110.29	0	498.51
redefine granular web-readiness	7.31	114.12	0	834.22
engage impactful supply-chains	7.77	128.27	10	841.05
brand collaborative convergence	5.12	41.1	0	210.43
engineer impactful interfaces	3.62	37.52	0	135.82
optimize front-end technologies	7.52	11.74	5	84.99
scale dynamic schemas	7.1	197.81	0	1404.45
strategize mission-critical channels	7.12	41.96	0	298.76
harness scalable content	9.77	44.13	0	431.15
target granular networks	6.34	194.25	0	1231.55
enable visionary info-mediarles	3.21	32.57	0	104.55
envisioneer B2B e-tailers	7.19	191.37	0	1375.95
architect 24/365 experiences	7.98	198.32	0	1582.59
implement bricks-and-clicks networks	8	174.33	0	1394.64
transform B2B architectures	6.69	94.57	0	632.67
brand frictionless markets	1.74	162.95	0	179.13
transform synergistic info-mediarles	1.21	118.87	0	143.83
reinvent scalable initiatives	7.24	27.97	0	202.5
deliver cross-platform applications	5.36	132.47	0	710.04
brand B2C functionalities	1.89	22.66	15	35.44

Price	Discount	Tax	Total
429	0	10	498.51
12	0	4	834.22
27	10	4	841.05
1	0	0	210.43
52	0	10	135.82
74	5	21	84.99
7.81	0	0	1404.45
96	0	4	298.76
13	0	4	431.15
425	0	0	1231.55
57	0	4	104.55
137	0	0	1375.95
832	0	21	1582.59
133	0	4	1394.64
57	0	21	632.67
2.95	0	10	179.13
1.87	0	4	143.83
97	0	0	202.5
247	0	10	710.04

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.