

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

Admin

+ New

Search

Search

PDF

Reset

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.

SaltOS

Dashboard

Applications

New - Invoices

Admin

+ New

Search

Q 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

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2025-04-01

6859.89

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P2025-0090

2025-04-18

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F2025-0089

2025-04-17

1763.59

Norton and Sons

U68180334

F2025-0088

2025-04-15

12090.3

Sandoval, Thomas and Young

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Foster, Kane and Carroll

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2025-03-04

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Miller-Fields

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2025-03-27

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Poole-Miller

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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

Proforma

Date

Invoice

Date

mm/dd/yyyy

mm/dd/yyyy

Customer

CIF

Address

City

Province / State

Zip

Country

Notes

Concepts

Description	Quantity	Price	Discount	Tax	Total

Taxes

Totals

Tax	Base	Total

Subtotal	Tax	Total

Payment method

Due date

Paid

Paid date

mm/dd/yyyy

mm/dd/yyyy

Status

New files

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

SaltOS

Dashboard

Applications

Detail - Invoices

Admin

+ New

Search

Q 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

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Thompson, James and Torres

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Davidson, Moran and Prince

C81511177

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Cooper-Ross

C92483881

F2025-0092

2025-04-17

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Fox PLC

H23319370

P2025-0091

2025-03-29

4261.76

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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

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5749.18

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17851.4

Gutierrez-Ortiz

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P2025-0082

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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

Proforma

Date

Invoice

Date

mm/dd/yyyy

mm/dd/yyyy

Customer

CIF

Walker, Foster and Medina

P80873247

Address

City

Province / State

3772 Thomas Shores, New Lukehaven, UT 16683

Wendyshire

New Mexico

Zip

Country

83217

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.

2

SaltOS

Dashboard Applications

Modify - Invoices

Admin

+ New

Search

Search

PDF

Reset

Closed

Paid

Customer	CIF	Invoice	Date	Total	Closed	Paid
<input type="checkbox"/> Walker, Foster and Medina	P80873247	P2025-0100	2025-04-01	16687.6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Hayes-Parks	V39652432	F2025-0099	2025-04-08	12886.5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Alexander-Durham	W56886873	P2025-0098	2025-04-20	5483.32	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> McCoy-Rhodes	E43222337	F2025-0097	2025-04-19	9399.21	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
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<input type="checkbox"/> Davidson, Moran and Prince	C8151177	P2025-0093	2025-04-12	615.18	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Cooper-Ross	C92483881	F2025-0092	2025-04-17	2056.47	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
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<input type="checkbox"/> Porter Ltd	F38025870	P2025-0090	2025-04-18	5696.69	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Payne LLC	A18104586	F2025-0089	2025-04-17	1763.59	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
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<input type="checkbox"/> Poole-Miller	E72630228	F2025-0083	2025-03-24	17851.4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Gutierrez-Ortiz	C42283849	P2025-0082	2025-03-01	10986.4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
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<input type="checkbox"/> Moore, Evans and Owen	C66662486	P2025-0079	2025-03-31	15250	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Proforma

Date

Invoice

Date

P2025-0100

04/01/2025

mm/dd/yyyy

Customer

CIF

Walker, Foster and Medina

P80873247

Address

City

Province / State

3772 Thomas Shores, New Lukehaven, UT 16683

Wendyshire

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83217

Switzerland

Notes

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

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optimize front-end technologies	7.62	11.74	5	21	84.99
scale dynamic schemas	71	197.81	0	0	1404.45
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transform synergistic info-mediararies	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

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', followed by a summary row with fields for Proforma, Code, Date, and Payment method. Below this is a table of line items with columns for Description, Quantity, Price, Discount, and Total. The table lists various services and their associated costs. To the right of the main form, there are additional fields for Date, Province / State, and a summary table for taxes.

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
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deliver cross-platform applications	5.36	132.47	0	710.04
brand B2C functionalities	1.89	22.66	15	35.44

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.