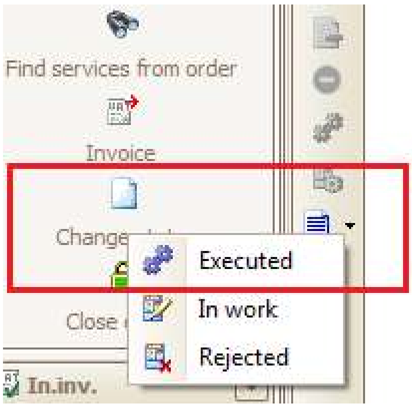
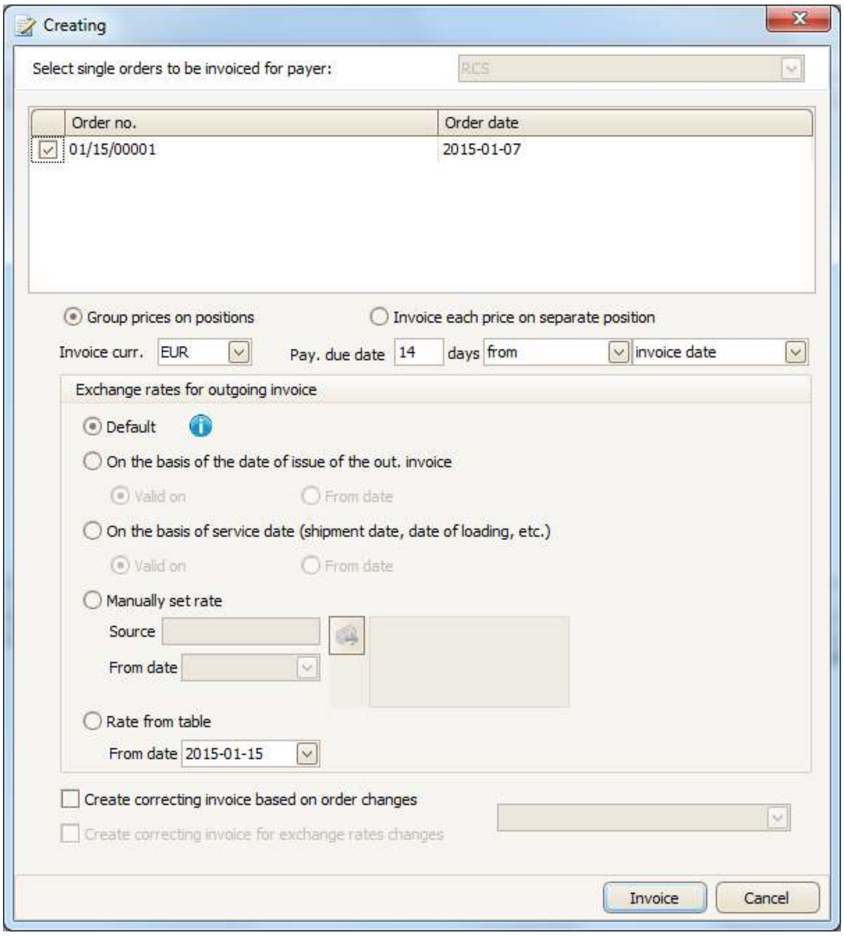
How to issue an invoice

Invoice based on registered services

After registering services you can issue an invoice for them. Such registered services must be invoiced from customer order view window. If you customer order view window is not open then you have to open it by clicking “Search” button in the menu on the left (“Cust. orders section”) and search for it. When customer order view window is open you need to change an order’s state to “Executed” (click button “Change state” from the menu in the left – “Cust. orders” section).



After customer order is in state “Executed” you have to click “Invoice” button (menu in the left). You will see a window with options to choose:



Here you can decide if:

- Prices will be grouped by their names on positions or

- Each price will be invoiced on separate position

You can also set: currency, payment due date and settings for exchange rates if necessary. After setting all options click “Invoice” button. You will see view window for invoice which is in “In work” state.

A new window with invoice view will be opened. In this window for all invoice positions you have to set its product code. To do this select position in “Invoice items” table and click “Edit” button  next to the table. In window that you will see choose “Position type” from combo box and click OK. Set product types for all positions in the same way.

In any time you can see invoice preview report from main menu (top side of the screen) choosing Reports->Print invoice. You will see a window with some printout options. Click “Preview” button to see invoice printout.

If everything is OK you can change invoice state to “Ready” (from left menu click “Change state” button). After you change invoice’s state to “Ready” the number of the invoice will be set. To have the invoice printout in “Final printout” (without watermark “Test printout”) the state of the invoice must be “Sent”.

Manual invoice

You can also issue an invoice manually. To do this you have to click “New” button (from the left menu) in the section “Out. Inv.”. You will see a window with some options then choose “Invoice – manually” and click “Finish”. Then fill in data like: Invoice date, Service date, Customer, Invoice currency and click “OK”.

A new window with invoice view will be opened in which you have to add positions to your invoice. Click “Add position” button  next to the table “Invoice items”. You will see a window for creating an invoice position. Set all necessary data like: Position type, Price per unit, Quantity, VAT and click “OK”. When you add all invoice positions then change its state to “Sent” like it was described in section ” Invoice based on registered services”.