

# Create Invoice

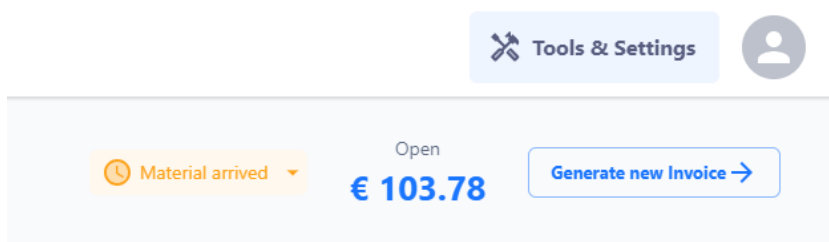
Invoices in Surface Solutions are created exclusively based on existing orders. This means that an invoice can only be generated if an order has a **positive outstanding amount**. If the outstanding amount is **greater than 0**, an invoice can be created. If the outstanding amount is **less than 0**, a **credit note** can be created instead (see the [Credit Notes](#) chapter).

## Access and Creation

To create a new invoice, first open the desired order.

In the upper section of the order editor — in the header — you'll find the button **“Generate New Invoice”**.

After clicking this button, the **invoice editor** will open.



The invoice editor displays all the information that will appear on the invoice. This data comes from three sources:

1. From the [order](#) - in particular, the items, amounts, and reference values.
2. From the [customer data](#) - such as name, address, contact person, and tax number.
3. From the [document definition](#) - including predefined standard texts, tax rates, payment terms, and legal notices.

**Invoice**

Title: Invoice Invoice Number: INV-2025-000002

Period of Performance: Nov 4, 2025 - Nov 19, 2025

Description: We appreciate your business and hereby present our invoice for the services performed.

**Positions**

POS	ARTICLE NO.	NAME	DESCRIPTION	COUNT	UNIT	PRICE PER UNIT	DISCOUNT	PRICE	ACTIONS
1	UPR	U-Profile		1	pcs.	34.59 €/pcs.	0 %	34.59 €	
2	ESBX	Edged Sheet B		1	pcs.	34.59 €/pcs.	0 %	34.59 €	
3	COCX	Construction C		1	pcs.	34.60 €/pcs.	0 %	34.60 €	
4	RK	Setup costs	Setup && preparation costs per order	1	pcs.	0.00 €/pcs.	0 %	0.00 €	
5	BP	Coating proto	Creation of a detailed coating protocol	1	pcs.	0.00 €/pcs.	0 %	0.00 €	
6	MT	Manual activiti	Sorting && manual work	1	pcs.	0.00 €/pcs.	0 %	0.00 €	

# Editing Options in the Invoice Editor

In the invoice editor, you can adjust various details before generating the invoice:

- **Sender information:** Select or modify your own address details.
- **Customer Information:** View the customer’s address and, optionally, add a separate delivery address.
- **Service period and description:** Free-text fields for a more precise description of the billed services.
- **Positions:**
  - Positions from the order are imported automatically.
  - Individual positions can be edited (quantity, unit price, discount, total price).
  - The order of positions can be changed.
  - Positions can be deleted if they should not appear on the invoice.
  - **Important:** Deleting a position in the invoice editor **does not remove it from the order**. It simply **won’t be printed on the invoice** and **won’t be marked as invoiced**.

After the invoice is created, all positions included in it are automatically marked as **invoiced** in the order.

When creating a new invoice, only **positions that have not yet been invoiced** are suggested.

## Totals and Taxes

Below the list of positions, you will find the **total overview**. Here, you can:

- Apply a **discount** to the total amount,
- Select the **tax rate** (a single overall tax rate per invoice),
- And — if enabled — display a **SEPA QR code** on the invoice to facilitate payment by bank transfer.

The available tax rates come from the [document definition](#) and can be maintained centrally there.

“ Surface Solutions attempts to automatically select the appropriate tax rate based on your country and that of your customer. However, you can override this selection manually at any time.

## Preview and Generation

Once all information has been checked and is complete, two actions are available:

### 1. **Show Preview**

Displays a temporary PDF preview of the invoice. This is for review purposes only and is clearly marked “Preview.” No document is saved or finalized during this step.

### 2. **Generate Invoice**

This action creates the invoice permanently.

Before generation, a preview is shown for final verification.

After confirmation, the invoice is assigned a **sequential invoice number** and saved in the **invoice overview**.

“ **Note:** Once generated, an invoice can **no longer be edited** or deleted. If a correction is necessary, the invoice can be adjusted using the “**Cancel**” option or by creating a **credit note** (see the respective chapters).

 Tools & Settings



Preview

✓ Generate invoice

# Invoice Number and Filing

The invoice number is **automatically assigned** upon generation.

The number format can be configured via the [document definition](#) — for example, sequential numbers, years, or combinations thereof.

The completed invoice is automatically stored in the [invoice overview](#). From there, it can be:

- Downloaded as a PDF, or
- Sent directly to the customer via email.

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Revision #2

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