

Invoice Overview

The **invoice overview** provides a central view of all invoices created in the system. From here, invoices can be viewed, exported, sent by email, or opened directly in the associated order.

You can access the invoice overview via the **“Invoices”** section in the navigation bar or through the quick access menu.



Calculations Offers Orders **Invoices** Purchases

After an invoice is generated, it is automatically listed in the invoice overview. Each invoice is displayed as a separate row and shows the most important information at a glance.

Displayed Information

The overview displays the following information for each invoice:

- **Invoice Number** – Automatically assigned according to the defined numbering logic.
- **Date** – The date and time the invoice was created.
- **Customer** – Name of the customer for whom the invoice was issued.
- **Creator** – User who generated the invoice.
- **Status** – Current status of the invoice (e.g., open, paid, canceled, etc.).
- **Type** – Type of document, e.g., invoice, time-based invoice, or credit note.
- **Amounts** – Displays **net** and **gross** amounts.

This overview allows the invoice progress to be efficiently tracked across the entire organization.

Invoice.NO	Date	Customer	Creator	Status	Type	Net Amount	Gross Amount		
INV-2025-000001	04.11.2025 11:19	Coating	Mansoor Hasani	Created	Invoice	103.78 €	123.50 €	Go to order	Export as PDF

Filter Functions

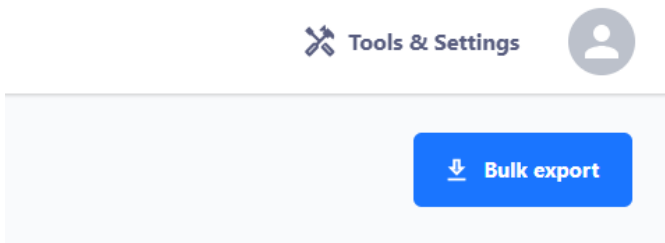
Using the filter bar above the table, invoices can be filtered by **status** and **customer**. Both filters can be combined to display specific subsets, for example, all open invoices for a particular customer.

Filtering is applied directly on the page, so results are updated immediately. The filter settings are reset when leaving the page.

Batch Export

The **Batch Export** function is available in the invoice overview. It allows invoices within a specific time period to be exported simultaneously as a ZIP file. The ZIP file contains a separate PDF document for each invoice.

This function is particularly useful for accounting purposes or regular archiving.



Actions per Invoice

For each invoice, several actions are available in the overview:

- **Go to Order** - Opens the corresponding order from which the invoice was created.
- **Send via Email** - Opens your local email client, allowing you to send the invoice.
- **Export PDF** - Allows downloading the invoice as a PDF file.

Cancellations

When the status of an invoice is set to “canceled,” the system automatically creates a **credit note**

Before creation, a confirmation dialog appears asking the user to confirm the cancellation.

After confirmation, the credit note is automatically generated and displayed in the overview as a separate invoice with the corresponding note. More details on canceling an invoice can be found on the [Canceling Invoices](#) page.

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