

Overview

With **Surface Solutions**, you can make your invoicing efficient, transparent, and traceable. It allows you to manage invoices, credit notes, and cancellation invoices in a structured way, issue partial invoices, automatically calculate totals, and handle export and dispatch directly from the platform.

With invoices, you can:

- Create, edit, and manage invoices for orders
- Issue partial invoices or adjust individual line items
- Generate credit notes when the open amount of an order is negative
- Automatically create cancellation invoices to correctly reverse already issued invoices
- Export invoices and credit notes as PDFs or send them by email

The invoice management system is modular and consists of several areas:

1. **Invoice Editor:**

Here, you create new invoices or credit notes from existing orders. All relevant information is pre-filled automatically, including customer data, line items, tax rates, and document templates. You can edit items, apply discounts, issue partial invoices, and check previews before the invoice is finally generated.

2. **Invoice Overview:**

Provides a central view of all invoices, credit notes, and cancellation invoices. You can filter by customer or status, access individual invoices, export them, or send them by email. From this overview, you can also access the functions for cancellation and credit note creation.

3. **Cancel Invoices:**

Enables the cancellation of already created invoices. A legally correct cancellation invoice is automatically generated to offset the original invoice. The status of the original invoice is set to "canceled," while the new cancellation invoice follows the same numbering sequence.

4. **Create Credit Notes:**

Allows you to create credit notes for orders with a negative open amount. The editor corresponds to the invoice editor, enabling adjustment of items, totals, and tax rates, generating an independent credit note with its own numbering sequence.

5. **Export Invoices:**

Enables batch export of multiple invoices within a defined date range. The selected invoices are compiled as PDF files in a ZIP archive for efficient archiving or further processing.

The invoice management in Surface Solutions thus provides a comprehensive solution covering all relevant steps from creation, editing, cancellation, and credit note generation to export. This ensures full control over open amounts, invoiced positions, and all invoice documents, regardless of the complexity of your orders.

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