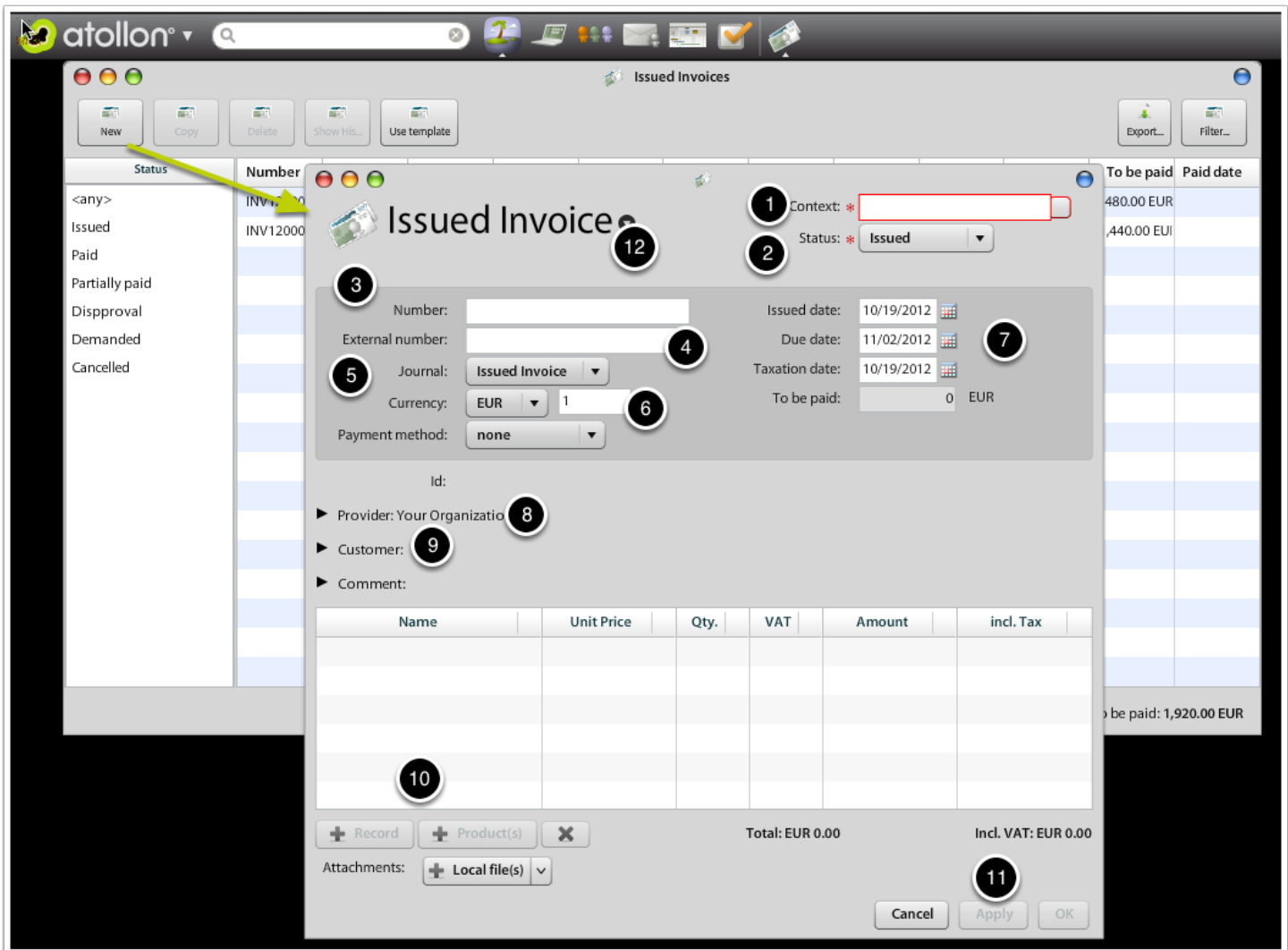


## Create New Invoice

Below is the explanation of ad-hoc invoice creation. If you want to explain Time Sheet invoicing, go to [Time Sheet help](#). If you want to explain more complex billing, go to [Billing help](#).



There are several steps to be done to create new invoice.

1. Select **Context** (Folder > Project)
2. You don't need to change **Status**. You may want to change it after it's approved / paid, etc.
3. The Invoice **Number** is entered by system automatically after saving the Invoice
4. **External number** may be (for example) No. of customer's order
5. **Journal**: specifies analytical accounts for reporting as well as Serial Numbering
6. Currency & exchange rate - they may be uploaded by system based on preset Taxation date
7. Dates may be freely adjusted, but Taxation date must fit Finance year (you may set the restriction in Finance Settings - MS Win client)
8. You may change **Provider** of the Invoice to different organization
9. You may select **Customer** from existing clients or partners
10. You may add one particular **Record**, free-form record or **Product** (or Service)
11. You should **Apply** to save the Invoice
12. The Invoice **context menu** will allow you to **Print** the Invoice

## Add New Invoice Record/Transaction

On Invoice detail, press button Add Transaction.

The screenshot shows a software interface for adding a transaction. A modal dialog box is open, titled 'Add Transaction'. It has two tabs: 'Basic' and 'Advanced'. The 'Basic' tab is selected. The fields in the dialog are as follows:

- Item:  Webhosting
- Title: Webhosting
- Quantity: 1
- Unit price: 120 USD
- Total amount: 120 USD
- VAT: [dropdown menu]
- Context: \* [red box]
- Description: Webhosting for period from X to Y.
- Organisation Unit: [text box]
- Client contract: [text box]

At the bottom of the dialog are 'Cancel' and 'OK' buttons. The background shows an invoice form with 'Add Transaction' and 'Remove Transaction' buttons, and a table with columns for 'incl. Tax'. The total amount is shown as 'Total: USD 0.00' and 'Ind. VAT: USD 0.00'.

The **Transaction** details allow you to enter free-text record, **Unit Price**, **Quantity** & confirm. **Context** (Project) is required.

Optionally, you may enter also the following fields:

**Dimension1, 2, 3:** Any **cost centre** (such as Organization Unit, Team, Location) used to categorize the transaction. The cost centre should be defined in [Dimension Settings](#).

## Print Invoice

In order to print invoice, you have several options. You can either print it from the browser using HTML preview, you can store the printout as PDF into the project folder or you can send the invoice as PDF attachment in e-mail.

### Print

This option displays the printout in browser. You can print it directly to the printer from browser (using Ctrl+P on MS Windows or Cmd+P on Mac OS X).

It is necessary to adjust [browser print options](#) in order to preserve optimal output on the printer.

### **Print to PDF**

This option is available only for specific print template, usually not used for invoices. Print template must be adjusted (Convert to PDF button must be added) in order to support this feature. This feature is used mainly in two-step printing process, in which users may fill-in additional content into form fields, before the actual print is generated.

### **Save PDF in context**

This option generates PDF document on server side and stores the print as PDF file into the (Project) Folder. The name of the file is indicated in the print dialog and may be changed before the print.

### **Send PDF by email**

This option generates PDF document on server side and opens new E-mail window with the printout attached in the form of PDF file.