

Configure customer portal invoices and exports

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Customer portal invoices are customer-facing invoice records that a signed-in reader can locate, inspect, and download. Document exports provide a ZIP response for authorised attachment IDs. These routes sit outside the main application menu and are useful when you are supporting a customer who needs an invoice or its documents.

If you need to...	Go to
Find an invoice or narrow the invoice list	Find and open customer invoices
Understand the list or an invoice record	Understand the invoice surfaces
Support a document download or ZIP export	Support invoice downloads and document exports
Diagnose an invoice-route failure	When the invoice route fails
Review payment-specific behaviour	Admin payments and follow-ups

Open the customer-facing invoice list from the customer portal. The list also supports additional pages, and each invoice reference opens its own record. Use **Download** for an invoice document.

Before you start

Prerequisites

- You are signed in for the invoice list route.

- You have the invoice identifier or enough customer information to locate the record.
- Invoice-list inputs are not required, and the invoice detail surface has no editable invoice fields.

The invoice detail route checks access before it opens the record. If that check fails, the customer portal home page is the next destination. The application checks attachment read access and read rules before it builds a ZIP response.

Find and open customer invoices

The invoice list is the starting point for locating an existing customer-facing invoice. Use its sort, filter, and search controls to reduce the list before opening the invoice record.

Prerequisites

- You are signed in.
- You know the invoice reference, date, status, or document type you want to find.

Steps

1. Open the customer-facing invoice list from the customer portal.
2. Select **Sort By:** and choose one option from the table.

If you want to sort by...	Choose
Invoice date	Date
Due date	Due Date
Invoice reference	Reference
Invoice status	Status

3. Select **Filter By:** and choose one option from the table.

If you want to see...	Choose
All matching records	All
Customer invoices and refunds	Invoices

If you want to see...	Choose
Vendor bills and refunds	Bills

4. Enter a search value in **Search** when the search bar is available.
5. Select the invoice reference in the **Invoice #** column.

Result: The invoice list is sorted or filtered, or the selected invoice record opens.

The list can also be restricted by both a start date and an end date. When no records are

returned, the page displays `There are currently no invoices and payments for your account.`

The current invoice route displays a server error before the list controls become available:

`500: Internal Server Error`. In that state, **Sort By:** is not on screen and the invoice list cannot be used.

Understand the invoice surfaces

An invoice list row identifies a document through its reference, dates, status, and amount

due. An invoice record adds the document report, a download action, and communication history

for support work.

Surface	What it provides
Invoice #	The invoice record link
Invoice Date	The invoice date
Due Date	The due date
Status	The invoice payment or cancellation status
Amount Due	The remaining monetary amount
invoice HTML	The embedded invoice report
Communication history	The invoice message thread
Download	The invoice document download
Send message	A message link when an invoice salesperson is present

The invoice detail surface is for inspection and document access; it does not provide editable invoice fields. The route can return an HTML, PDF, or text report when the matching report type is requested. With no report parameters, it renders the invoice detail page.

Support invoice downloads and document exports

A legal attachment is the document returned for a posted invoice. When more than one legal attachment exists, the invoice download returns a ZIP. The direct export route also builds a ZIP after checking attachment read access and read rules.

Prerequisites

- The invoice is open when you use **Download**.
- For the posted-invoice download branch, the invoice is posted.

Steps

1. Open the invoice record.
2. Select **Download**.
3. Check the returned document type.

If the request is...	The route returns...
A posted invoice with one legal attachment	The legal attachment
A posted invoice with more than one legal attachment	A ZIP
A report request for HTML, PDF, or text	The requested report

Result: The invoice document or ZIP response is available for the customer-facing document request.

Handle invoice and access branches

Invoice branches tell you what the reader can see after filtering, opening, or requesting a document. Use the visible status and the route outcome to choose the support path.

Steps

If invoice-detail access fails, the application redirects to the customer portal home page.

1. Check the invoice list outcome against the table.

If the list shows...	Continue with...
No records	The empty-list message
Records	The invoice row and its status
Paid	Document or payment follow-up support
Reversed	Reversal support
Waiting for Payment	Payment follow-up support
Cancelled	Cancellation support

2. Check whether the request included both a start date and an end date when the reader expects a date-restricted list.
3. Open the invoice record when access succeeds.
4. Send payment-method questions to Admin payments and follow-ups.

Result: You have identified the invoice branch and the next support route.

Payment-specific messages belong to the payment surface, including

No suitable payment method could be found. and

If you believe that it is an error, please contact the website administrator.

When the invoice route fails

Use this section when the invoice route stops before the invoice list appears. The generic

invoice error message is There was an error processing this page.

What you see	What it means	What to do
500: Internal Server Error	A template-rendering failure stopped the invoice list.	Record the error details for support escalation.
A template-rendering failure caused by a missing database field	A required database field is unavailable.	Include the database-field error details in the escalation.

What you see	What it means	What to do
Sort By: is not on screen	The list did not reach the search-bar controls.	Troubleshoot the route error before attempting sorting.

The error page also displays **Restore previous version (soft reset)**, and **Reset to initial**

version (hard reset). These are recovery controls on the error page, not invoice-list controls.

Know what to do next

To continue, use [Find and open customer invoices](#) to locate the record, [Understand the invoice surfaces](#) to review it, and [Support invoice downloads and document exports](#) to handle its documents.