SHERKETYERP

Customer portal invoices and exports

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Customer portal invoices are customer-facing records that let you find invoices, open their
details, and request document downloads. Invoice terms are the company's conditions that
accompany its invoices. A document export packages selected attachments as a ZIP file.

If you need to…	Go to…
Find an invoice or bill	Find an invoice
Understand the list columns and statuses	Understand the invoice list
Open an invoice and request its documents	Open and download an invoice
Read the company's invoice terms	Read the invoice terms
Export selected documents	Export documents as a ZIP file
Configure or support these routes	Customer portal invoices and exports
Continue invoice and payment work	Customers, products, and invoices and Payments and follow-ups

Start with the prerequisites, then find the invoice or document action you need.

Before you start

Prerequisites

- Sign in before opening the invoice list or requesting an attachment export.
- Have a real invoice ID before opening an individual invoice route.

- For the terms page, invoice terms must be enabled and use HTML terms.
- For an attachment export, have readable attachment IDs and a filename.
- If the terms preview banner is available to your role, you can use **Back to settings** or **Close** from that banner.

With these conditions in place, find the invoice or bill you need.

Find an invoice

An invoice list is the customer-facing starting point for locating an invoice or bill that is already available to your account.

Prerequisites

- Sign in.

Steps

1. Open the invoice list from the customer portal home.
2. Choose the portal destination that matches your task:

If you need to…	Choose…
Open outgoing invoice records	**Your Invoices**
Open incoming bill records	**Our Invoices**

3. Choose the list view that matches your task:

If you need to…	Choose…
See all available invoice and bill records	**All**
See outgoing invoices, refunds, and receipts	**Invoices**
See incoming invoices, refunds, and receipts	**Bills**

4. Use the default list ordering when you do not choose another sort option; it is **Date**.
5. Open the next page of the invoice list when the record you need is not on the current page.

Result: The invoice list opens with the selected invoice or bill scope and its default date ordering when you make no other choice.

Understand the invoice list

The invoice list is a table of available records. It gives you the invoice reference, dates,
payment status, and remaining amount before you open a record.

Column or status	What to look for
Invoice #	Select the invoice reference to open its detail page. A draft record is shown as `Draft Invoice`.
Invoice Date	The date assigned to the invoice.
Due Date	The payment due date; this column is hidden on small screens.
Status	The payment or cancellation state shown for the record.
Amount Due	The remaining monetary amount; refund records use the negative residual expression.
Paid	The posted invoice has a paid or in-payment state.
Reversed	The posted invoice has a reversed payment state.
Waiting for Payment	The posted invoice has another payment state.
Cancelled	The invoice state is cancelled.

When the account has no invoice records, the list displays:
`There are currently no invoices and payments for your account.`

Select a row's **Invoice #** to continue to its detail page.

Open and download an invoice

An invoice detail page brings together the invoice report, the amount shown in the sidebar,
the responsible contact, and the available document actions.

Prerequisites

- Identify an invoice in the list.
- Have a saved invoice selected from the list.

Steps

1. Select the invoice reference in **Invoice #**.
2. Review the invoice report in the **Invoice HTML** area.

3. Review the amount shown in the invoice sidebar.
4. Select **Download** to request the invoice PDF.
5. If you need the discussion area, select **Send message**.

The available document response depends on the request:

If the request is…	The response is…
An HTML, PDF, or text report request	The corresponding invoice report
A PDF download for a posted invoice with one legal attachment	The attachment as a PDF response
A PDF download for a posted invoice with multiple legal attachments	The attachments as a ZIP response
An invoice access check that fails	A redirect to the customer portal home

Result: The invoice detail page remains available for review, or the requested invoice report or legal-document response is returned.

Continue to the invoice terms when you need to check the conditions that accompany the invoice.

Read the invoice terms

The terms page displays the company's invoice terms for readers who need to check the
conditions that accompany its invoices.

The page may show the configured heading **STANDARD TERMS AND CONDITIONS OF SALE**.

Prerequisites

- Invoice terms are enabled.
- The terms type is HTML.

Steps

1. Open the invoice terms page from the customer portal.
2. Read the terms shown on the page.
3. Use the preview banner according to your task:

If you need to…	Select…
Open settings	**Back to settings**
Remove the banner	**Close**

If the terms configuration does not meet the route requirements, use the result that matches
what you see:

If…	The page…
Invoice terms are enabled and use HTML	Displays the terms page
Invoice terms are disabled or use another terms type	Displays the HTTP error page

Result: The invoice terms page is open, or the page displays its HTTP error page.

When you need to package selected attachments, continue to the document export action.

Export documents as a ZIP file

The document-export route packages selected readable attachments into one ZIP response; it
does not open a document-entry screen.

Prerequisites

- Sign in.
- Have the attachment IDs to export.
- Have the filename for the ZIP response.

Steps

1. Open the document export action with the attachment IDs and filename you provide.

Result: The selected attachments are returned as a ZIP file.

If the page displays a message instead of the expected result, use the matching troubleshooting
row below.

When something goes wrong

Use the message on the page to identify the branch you reached.

What you see	What it means	What to do
`There are currently no invoices and payments for your account.`	No invoice records are available in the list.	Return to the portal home and use the invoice or bill entry that matches the records you need.
`There was an error processing this page.`	The invoice detail page reported a generic processing error.	Return to the invoice list and open the record again.
`Oops` and `The requested page is invalid, or doesn't exist anymore.`	The terms route is unavailable for its current configuration.	Return to the portal area that brought you to the terms route.
`The field %s must be filled.`	A required selection field has no value.	Select a value in the required field before continuing.
`500: Internal Server Error` and `UndefinedColumn: column account_move.is_foreign_currency does not exist`	The invoice list failed while rendering the invoice template.	Use General error messages for the next support step.
`Restore previous version (soft reset).` or `Reset to initial version (hard reset).`	The invoice route is showing its template recovery controls.	Do not use a recovery control as an invoice action; follow the support guidance instead.

What to do next

After you finish with the customer portal routes, continue according to the result:

What you have now	Continue with…
An invoice that needs broader record work	Customers, products, and invoices
A payment status that needs follow-up	Payments and follow-ups
A portal route that needs configuration or support	Customer portal invoices and exports
A general route or server error	General error messages

Selecting an invoice reference continues from the invoice list to the invoice detail page.

Back to settings returns from the terms preview banner to settings. An invoice access failure redirects to the customer portal home, and a successful document export ends with a ZIP response.