

Invoice settings

September 10, 2026

Invoice settings

Invoice settings is the finance configuration page for choosing how invoices are generated for finance branches. The **Auto generate** choice determines whether the invoice is an editable proforma or a non-editable invoice.

If you need to...	Go to
Prepare access and branch conditions	Before you start
Open the configuration page	Open Invoice settings
Identify the fields and page areas	Understand the Invoice settings screen
Change the invoice choice	Change and save an invoice choice
Leave after changing a choice	Handle branch and unsaved-change variations
Diagnose a load or save message	When loading or saving goes wrong
Review history or continue with invoice work	Continue after Invoice settings or Invoice lifecycle

Before you start

The page uses the subscription, your editing access, the loaded company, and the open branch to decide which parts of the settings surface you can use.

Check	What must be true	What you see when it applies
Subscription	The invoice-setting feature is included.	The settings surface loads.
Editing access	You have permission to edit the settings.	Save and Save and Close are available when a change exists.
Company	The company identifier is loaded.	Last Modifications appears.

Check	What must be true	What you see when it applies
Branch	A finance branch is open.	Its invoice choices appear.
Saved state	The loaded choice has no uncommitted change, or you are ready to handle the leave prompt.	The page can detect whether the choice changed.

If the subscription does not include the feature, the page shows the subscription-upgrade surface instead of the settings surface. If editing access is unavailable, the save controls are not available.

Open Invoice settings

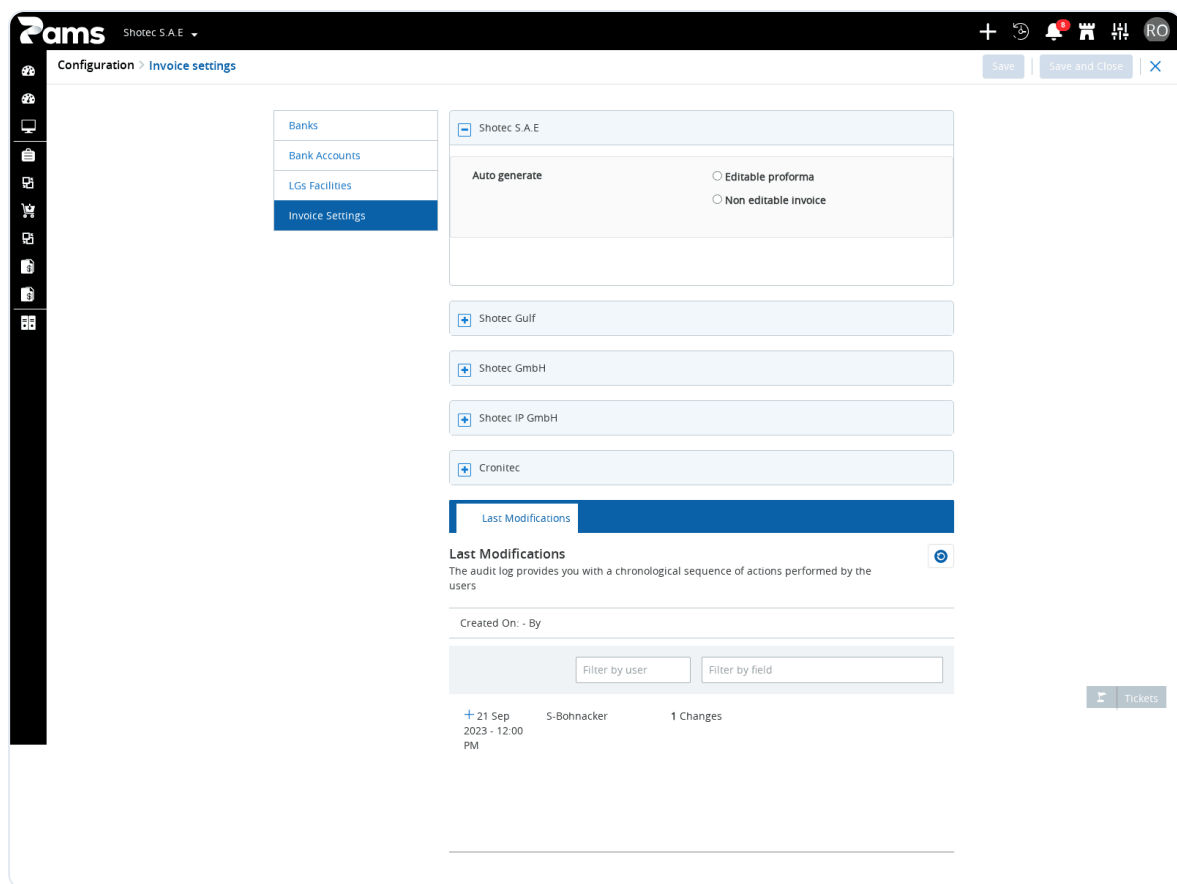
Open the finance configuration page through its registered route.

Prerequisites

- You are signed in.
- The Configuration menu is available.

Steps

1. Open the **Configuration** menu.
2. Select **Invoice settings**.



Result: The Invoice settings page opens with the branch settings surface available.

Understand the Invoice settings screen

An invoice-setting branch is the expandable area where you choose the invoice-generation mode. The page also provides page actions and an audit history for the loaded company.

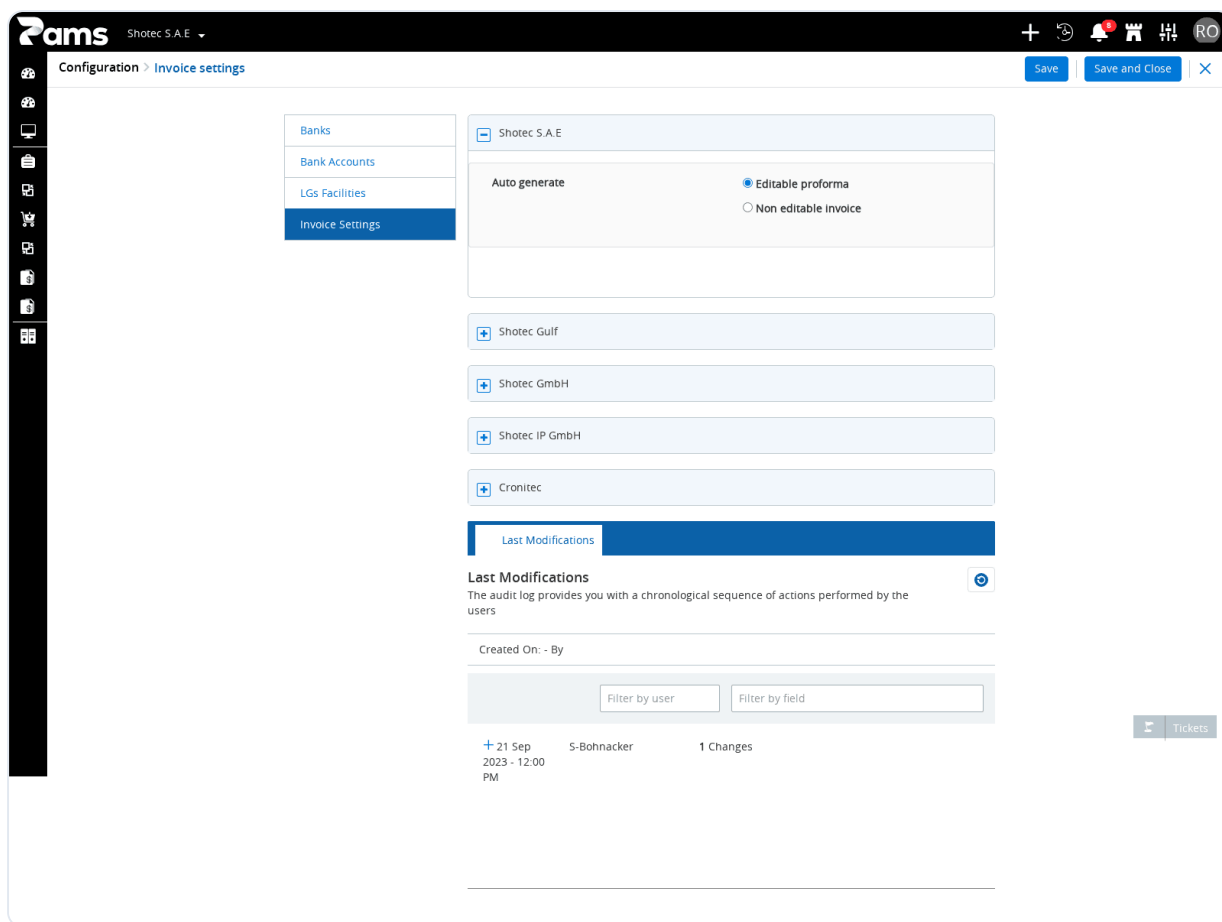
Area	What it contains
Branch list	Five branch headings. Open one heading to see its invoice choices.
Invoice choice	Auto generate , with Editable proforma and Non editable invoice as the two radio choices.
Page actions	Save , Save and Close , and a button titled Refresh .
History	Last Modifications , with chronological user-action text and metadata fields including Created On and By .

The three invoice-choice labels have no required marker. No table or additional fields appear on the

page. Selecting a branch heading opens that branch and closes another branch that was open.

The screenshot shows the 'Invoice settings' configuration page in the PAMS system for the entity 'Shotec S.A.E'. On the left, a sidebar menu lists 'Banks', 'Bank Accounts', 'LGS Facilities', and 'Invoice Settings' (which is highlighted). The main content area is divided into two sections. The top section, titled 'Shotec S.A.E', contains an 'Auto generate' section with two radio button options: 'Editable proforma' (selected) and 'Non editable Invoice'. Below this are five expandable sections for different branches: 'Shotec Gulf', 'Shotec GmbH', 'Shotec IP GmbH', and 'Cronitec', each with a plus icon to expand. The bottom section, titled 'Last Modifications', is highlighted with a blue header. It includes a description: 'The audit log provides you with a chronological sequence of actions performed by the users'. Below the description is a table with columns 'Created On' and 'By'. The table contains one entry: '+ 21 Sep 2023 - 12:00 PM' and 'S-Bohnacker'. To the right of the table, it says '1 Changes'. There are also filter buttons 'Filter by user' and 'Filter by field'. At the top right of the page, there are buttons for 'Save', 'Save and Close', and a close icon. A 'Tickets' button is located at the bottom right.

Select **Last Modifications** when you need to review the audit history below the branch settings.



Change and save an invoice choice

Select the option that matches the required invoice handling.

Prerequisites

- The invoice-setting feature is included in the subscription.
- You have editing permission.
- The branch you want to change is open.

Steps

1. Select the invoice choice that matches the required invoice handling:

If the invoice must...	Select
Remain editable as a proforma	Editable proforma
Remain non-editable	Non editable invoice

2. Select the save action that matches what you want to do next:

If you want to...	Select
Keep the settings page open	Save
Save the choice and leave the page	Save and Close

The page validates the form before saving. A successful save refreshes the saved settings and the

Last Modifications history. It displays Your company process approval settings has been saved successfully .

If the save returns an error, it displays Server Error .

Result: The selected invoice choice is submitted through the save action you chose; an in-page save keeps the settings page open, while **Save and Close** leaves it after the save completes.

The screenshot displays the 'Invoice settings' page in the PAMS system. The interface includes a left-hand navigation menu with options like 'Banks', 'Bank Accounts', 'LGS Facilities', and 'Invoice Settings'. The main area is titled 'Configuration > Invoice settings' and features a 'Save' button and a 'Save and Close' button. The settings are organized into sections, including 'Shotec S.A.E' with an 'Auto generate' option set to 'Editable proforma'. Below this, there's a list of entities: 'Shotec Gulf', 'Shotec GmbH', 'Shotec IP GmbH', and 'Cronitec'. At the bottom, a 'Last Modifications' section provides a chronological sequence of actions, with a filter by user and field, and a timestamp of 21 Sep 2023 - 12:00 PM.

Handle branch and unsaved-change variations

Select a branch heading to open its settings and close any other branch that is open. When a choice

changes, the unlabeled close button at the top of the page opens a confirmation dialog.

Situation	What to do
The branch is closed	Select its branch heading or expand control to open it.
Another branch is open	Select the branch heading you need; the previously open branch closes.
You have not changed the setting	Select the unlabeled close button at the top of the page to leave directly.
You changed the setting and select the unlabeled close button at the top of the page	Choose how to handle the unsaved change in the Leaving Page dialog.

Prerequisites

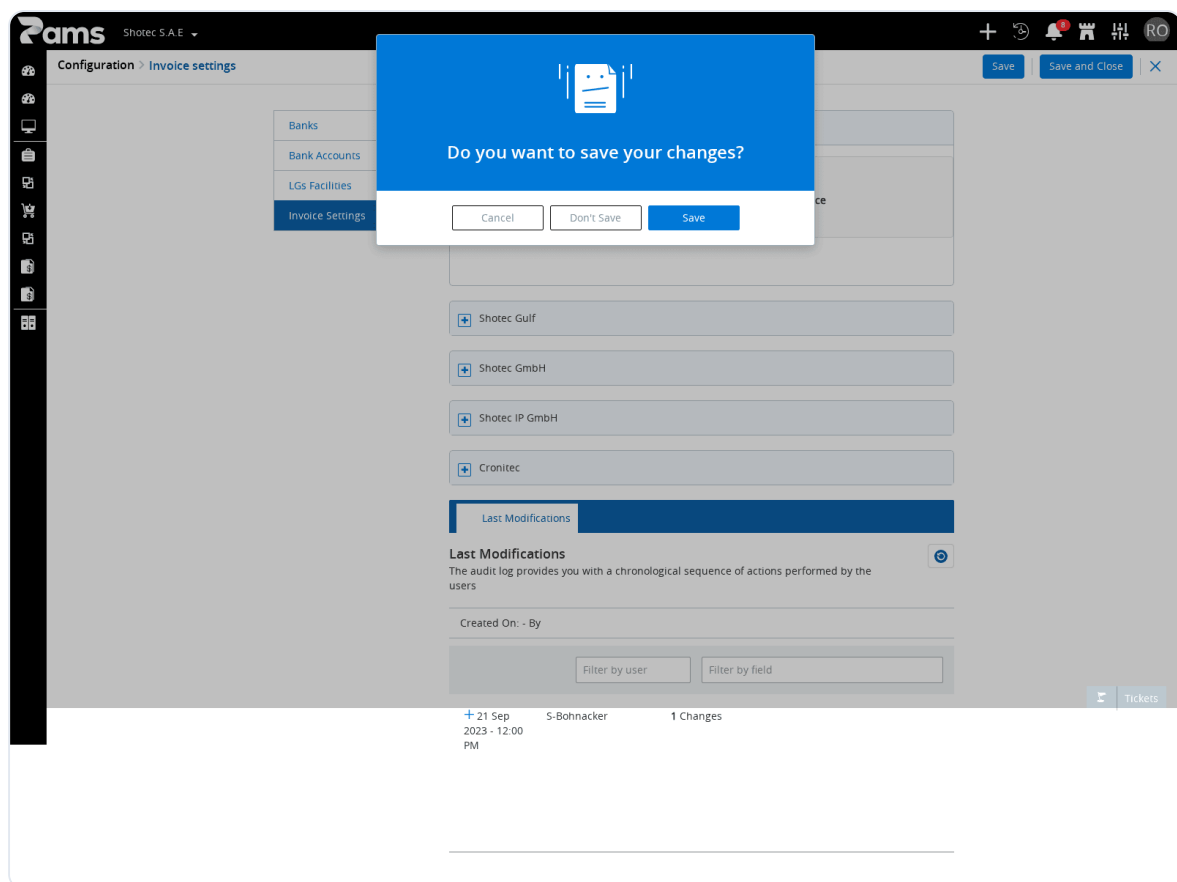
- A branch is open.
- You changed its invoice choice and want to leave before using the page save action.

Steps

1. Select the unlabeled close button at the top of the page.
2. In the **Leaving Page** dialog, choose one action:

If you want to...	Select
Keep the dialog open	Cancel
Discard the changed choice and leave	Don't Save
Save the changed choice through the dialog	Save

The dialog asks, `Do you want to save your changes?` .



Result: **Cancel** keeps the dialog open, **Don't Save** discards the change and lands at the home page, and the dialog **Save** action saves the changed choice.

When loading or saving goes wrong

Use the message text to identify whether the problem occurred while loading the settings or while saving a changed choice.

Message	What it indicates	Next action
An error occurred while processing your request	Loading the invoice settings failed.	Return to Invoice settings and try opening the page again.
Server Error	Saving the changed setting returned an error.	Review the branch choice and use the save action again.
Save controls are unavailable	Editing access is unavailable.	Review the setting without changing it, then use the unlabeled close button at the top of the page to leave.

Message	What it indicates	Next action
The settings surface is replaced by subscription-upgrade content	The subscription does not include the feature.	Use the subscription-upgrade surface before returning to invoice settings.

Continue after Invoice settings

Use **Last Modifications** after reviewing or saving a branch choice to review the chronological user-action information for the loaded company.

Prerequisites

- The company identifier is loaded on the page.

Steps

1. Select **Last Modifications**.
2. Review the chronological user-action text and the metadata fields including **Created On** and **By**.

Result: The audit-history surface is open below the branch settings. Continue invoice processing in [Invoice lifecycle](#).