PAMS FRESH GENERATION

Create an Account Invoice

September 10, 2026

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Create an account invoice

Use this task to create an account invoice or an additional invoice before you continue with the
invoice lifecycle. An account invoice starts from **Account Invoices**. An additional invoice starts
from **Additional Invoices**. The invoice status flow includes Draft, Ready for approval, Approved,
Due, Overdue, and Paid.

If you need to…	Go to
Create an account invoice	Before you start, then Open the invoice form
Create an additional invoice	Before you start, then Open the invoice form
Enter invoice details and items	Complete and save the invoice
Correct a validation message	When validation fails
Continue with a saved invoice	Continue with the saved invoice
Follow invoice statuses and the saved workspace	Invoice lifecycle
Record a payment after invoicing	Record a payment

Before you start

An account invoice or additional invoice is a new finance record that you prepare from its own
creation route. Before you open the form, have the invoice information ready and know which route
matches the record you need.

Prerequisites

Check before you start	What to have ready
Invoice type	Know whether you are creating an account invoice or an additional invoice.
Access	The page is available only when the subscription and page guards allow the invoice surface.
Editing	Editing access allows a new invoice before you use **Save** or **Save and Close**.
Required information	Prepare the value for **Invoicing Address** and the person to select in **Issued By**.
Account invoice	For an account invoice, select an account in **Account**.

The form marks **Invoicing Address** and **Issued By** as required.

The invoice record is available only when the invoice subscription is included. If it is not
included, the invoice surface offers an upgrade instead.

The **Account Invoices** route is available only under the product's Shotec-company condition.
The account invoice requires an account selection in addition to **Invoicing Address** and
Issued By.

Review the value shown in each field before saving.

Open the invoice form

The invoice form is the shared screen used by both creation routes. Select the route for the
invoice type you need.

Prerequisites

- You have the invoice type and the information listed in Before you start.

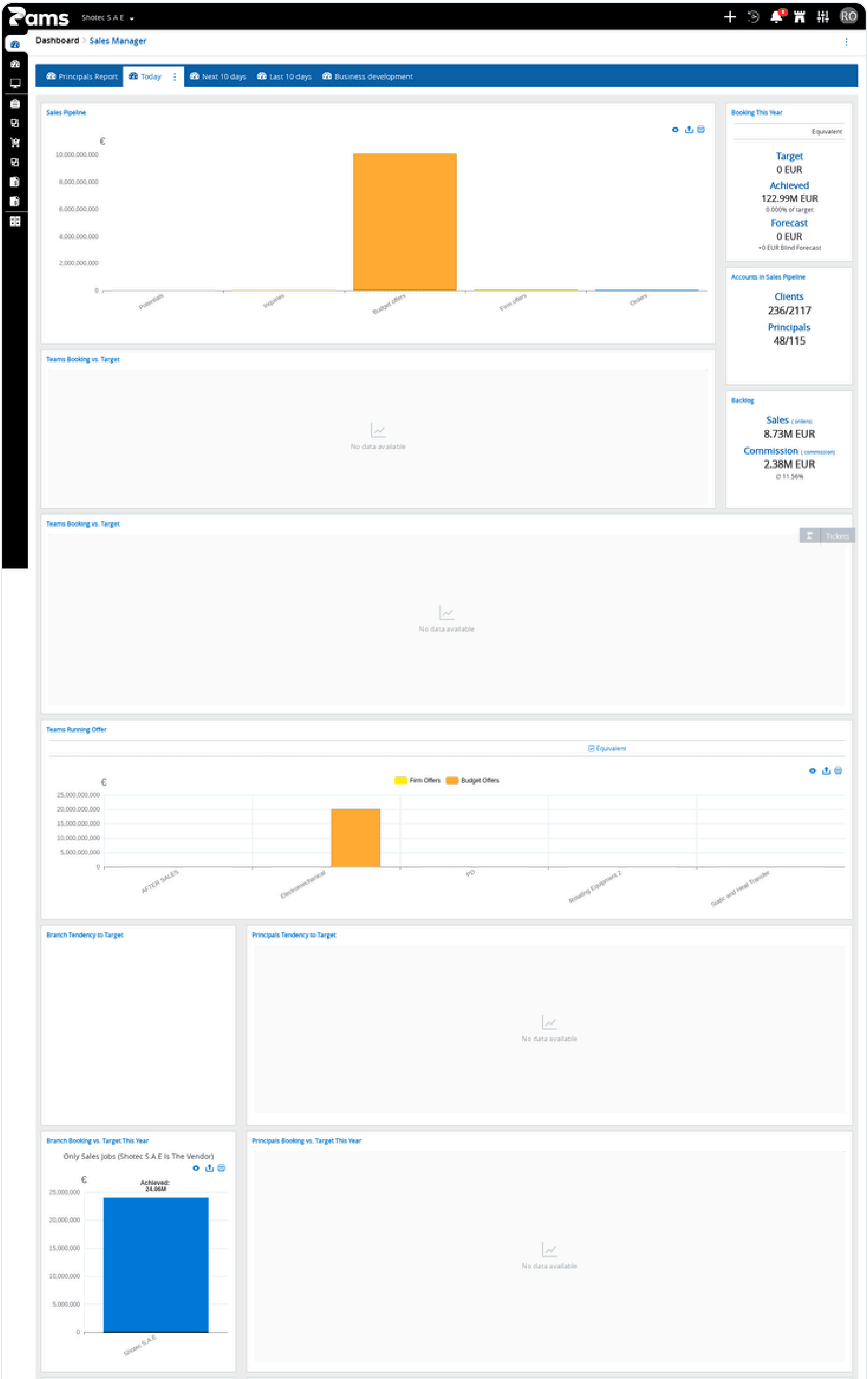
Steps

1. Open **Financial**.
2. Open **Receivables**.
3. Select the invoice type you need.

If you need to create…	Select
An account invoice	**Account Invoices**
An additional invoice	**Additional Invoices**

4. Confirm that the invoice form opens before entering information.

The selected route opens the corresponding invoice form.



Shotec S.A.E
Dashboard
Sales Manager
Principals Report
Today
Next 10 days
Last 10 days
Business development
Sales Pipeline
Booking This Year
Equivalent
Target
0 EUR
Achieved
122.99M EUR
Forecast
0 EUR
Accounts in Sales Pipeline
Clients
236/2117
Principals
48/115
Teams Booking vs. Target
No data available
Backlog
Sales
8.73M EUR
Commission
2.38M EUR
Teams Booking vs. Target
No data available
Teams Running Offer
Equivalent
Firm Offers
Budget Offers
Branch Tendency to Target
Principals Tendency to Target
No data available
Branch Booking vs. Target This Year
Only Sales Jobs (Shotec S.A.E Is The Vendor)
Principals Booking vs. Target This Year
No data available

Result: The selected invoice route is open and ready for you to enter invoice information.

Understand the invoice form

The invoice form combines invoice information, an item grid, a note, and actions for saving or
continuing with an existing invoice. The fields shown depend on the invoice type and the current
invoice state.

The main invoice information includes the fields in the following table.

Information	Control
Account selection	**Account**
Date	**Invoice Date**
Address destination	**Billing address destination**
Invoice address	**Invoicing Address**
Payment term	**Payment Period**
Issuer	**Issued By**
Note	**Invoice Note**

The item area uses the columns in the following table when they are available on the form.

Item information	Column
Description	item column
Unit	**Unit**
Quantity	**Qty**

Item information	Column
Unit price	**Unit Price**
Commission amount	**Commission Amount**
Amount	**Amount**
Currency	**Currency**
Discount	discount column
Installment	**Installment (%)**
Tax	tax percentage column

Area	What to use it for	Conditions
Account	For an account invoice, select an account in **Account**.	The account choice applies to the account-invoice type.
Invoice information	Enter dates, address information, payment terms, issuer, and note.	**Invoicing Address** and **Issued By** are required fields.
Item grid	Enter the invoice rows and review the calculated item values.	The available columns and the initial row depend on the information available to the form.
Existing-invoice actions	Approve, request approval, edit, print, download the invoice template, or open tabs.	These actions require an existing invoice and their own status or permission conditions.

The form also contains four selects without their own field label used for account, payment period,
payment method, and freight type. Use the surrounding field label and the selected value to identify
the relevant choice.

The item grid can use the invoice items collection or the after-delivery milestone items collection.
The available item columns can therefore vary with the form setup. Review the headers shown before
entering a row, then continue to Complete and save the invoice.

Add a billing address

Selecting an account loads the billing-address choices for that account. You can add a destination when the account edit permission and branch conditions allow it.

Prerequisites

- You have chosen the invoice type and opened its route.

Steps

1. In **Account**, select the account.
2. If billing-address creation is available, open the address-creation form.
3. Enter the destination information in the popup.

Information	Field
Destination name	**Destination Title**
Country	**Country**
State	**State**
City	**City**
Street	**Street**
Postal code	**Zip-code**

Result: The new destination is saved, selected, and used to update **Invoicing Address**.

The address-creation form provides **Destination Title**, **Country**, **State**, **City**, **Street**, and **Zip-code**. **Destination Title** is required; the other required markers depend
on configuration.

The grid can display these product labels: the item column, **Unit**, **Qty**, **Unit Price**, the discount column, **Item Price**, and **Currency**. The tax column is shown when present.

Complete and save the invoice

Complete the invoice information and item rows, then use the save action that matches whether you
want to remain on the form.

Prerequisites

- You have opened the correct invoice route.

- You have the invoice information and item values ready.
- You know the value for **Invoicing Address** and the person to select in **Issued By**.

Steps

1. Complete the invoice information.

Enter or select…	In…
The account for an account invoice	**Account**
The invoice date	**Invoice Date**
The billing destination	**Billing address destination**
The invoicing address	**Invoicing Address**
The payment-period count and time period	**Payment Period**
The invoice issuer	**Issued By**
The invoice note, when needed	**Invoice Note**

2. Complete an item row using the headers available on your form.

Check…	Enter…
Quantity	A value from `0` to `999999` in **Qty**
Non-negative amounts	Values in **Unit Price** and the tax percentage column that are not negative
Discount	A value from `0` to `100` in the discount column

3. Select the save action you need.

If you need to…	Select
Save and remain on the form	**Save**
Save and close the form	**Save and Close**

Result: The invoice is ready for the selected save action. If a validation message appears,
use When validation fails.

When the save succeeds, the form displays `Invoice saved successfully`. **Save and Close** leaves
the page after a successful save. If saving fails, the form displays `Invoice failed to save`.

Save and Close is enabled only when editing is allowed and changes exist.

When validation fails

Use the message on screen to identify which value needs attention. The messages below are the
validation and request messages associated with the invoice form and its item rules.

The validation heading is `Validation errors:`.

Message	What to check
`This field is required`	Check **Invoicing Address**, **Issued By**, or the item field that is marked required.
`Invalid input. The value must be greater than 0 and cannot exceed 999,999.00`	Check **Qty** and enter a value within the permitted quantity range.
`Invalid input. Please enter a non-negative value`	Check **Unit Price** or the tax percentage column and remove the negative value.
`An error occurred while processing your request`	Review the invoice information and try the applicable save action again.
`Check validation`	Review the fields and item rules before selecting **Save** or **Save and Close** again.

If the route opens **Dashboard** instead of the invoice form, return to Open the invoice form
and open the route for the invoice type you need.

After you correct the value, repeat the applicable save step in Complete and save the invoice.

Review currency and totals

Changing the invoice currency updates the invoice symbol, code, and rate, applies the symbol and code
to each item, and recalculates the items. Updating an item recalculates its amount and the invoice
totals.

For an account invoice, the saved workspace can show invoice amount, total taxes, total including tax,
paid amount, deductions, and due amount. The due amount is the total including tax

less the paid amount
and deductions. A branch-currency due amount appears when the currencies differ and a rate is available.

Out of scope

Sales- and commission-only fields and grids belong to Invoice lifecycle, not this account or additional invoice creation task.

Continue with the saved invoice

The saved invoice continues through the invoice lifecycle. Its status path includes Draft,
Ready for approval, Approved, Due, Overdue, and Paid. Use Invoice lifecycle for the saved invoice workspace, status actions, and related tabs.

When the invoice reaches the payment stage, use Record a payment for the separate payment task.

The saved-invoice workspace owns the following actions for an existing invoice. Their availability
depends on its status, permissions, or user role.

Leaving an invoice with unsaved changes opens a confirmation before the page closes or the route
changes.

Area	Controls
Related tabs	Comments, Attachment, Tasks, Activities, Deductions, Payments