Invoice lifecycle

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Invoice lifecycle at a glance

An invoice records an amount owed, its approval position, and its payment position. Invoices move from preparation through approval and then into **Due**, **Overdue**, or **Paid**.

```
stateDiagram-v2
    Draft --> "Awaiting Approval": Request approval
    Draft --> Approved: Approve
    "Released for Invoicing" --> "Awaiting Approval": Request approval
    "Released for Invoicing" --> Approved: Approve
    "Awaiting Approval" --> Approved: Approve
    "Awaiting Approval" --> Draft: Cancel request for approval
    "Awaiting Approval" --> "Rejected Approval": Reject approval request
    Approved --> Draft: Consider as not approved
    Approved --> Due: Consider as sent
    Due --> Overdue: payment period passes
    Due --> Paid: due amount is zero or less
    Overdue --> Paid: due amount is zero or less
```

The status list includes **Draft**, **Released for Invoicing**, **Awaiting Approval**, **Rejected Approval**, **Approved**, **Due**, **Overdue**, and **Paid**. An invoice is **Paid** when its due amount is zero or less. It is **Overdue** when its payment period has passed and
the due amount remains; otherwise, it is **Due**.

If you need to…	Go to
Locate an invoice	Find and open an invoice
Open receivables	**Receivables** in **Financial**
Read fields, totals, or related areas	Read the invoice workspace
Choose an invoice creation route	Choose an invoice creation route

If you need to…	Go to
Request or complete approval	Request and complete approval
Follow payment status	Follow Due, Overdue, and Paid branches
Create an invoice	Create an Account Invoice
Record a payment	Record a payment
Review principal invoices	Principal invoices
Review purchase invoices or outgoing payments	Payables

Before you start

The invoice workspace is the finance area where you locate an invoice, review its status, and continue the action available for that status.

An approval process determines whether approval actions apply, and approval permission determines which permitted action you can use.

Prerequisites

- Your account includes the invoice feature.
- You have a saved invoice for approval actions and saved-record areas.
- You have no unsaved invoice changes before requesting or completing approval.
- An approval process applies before **Approve** or **Request approval** appears.
- You have the approval permission required for the action.
- You have the invoice information needed for the form, including **Invoicing Address** and **Issued By**.

After these checks, open **Financial** and choose **All Invoices** to locate the invoice.

Find and open an invoice

The invoice list is the starting point for locating a saved invoice by invoice type or status.
Open **Financial** and choose **All Invoices**.

Prerequisites

- You can open the finance invoice workspace.

Steps

1. Open **Financial** and choose **All Invoices**.
2. Choose the list that matches your work.

If you need to…	Choose
Review all invoice records	**All**
Review sales invoices	**Sales Invoices**
Review commission invoices	**Commission Invoices**
Review incoming payments	**Incoming Payments**
Track principal invoices	**Tracking Principal Invoices**

The invoice workspace can also include **Payment List**, **Principals Invoices**, and **Receivables**.
Account Invoices is not an active list tab; use the invoice creation route instead.

3. Choose the status view that matches the invoice position.

If you need to…	Choose
Review upcoming invoices	**Upcoming**
Review drafts	**Draft**
Review approved invoices	**Approved**
Review receivables	**Receivable**
Review paid invoices	**Paid**

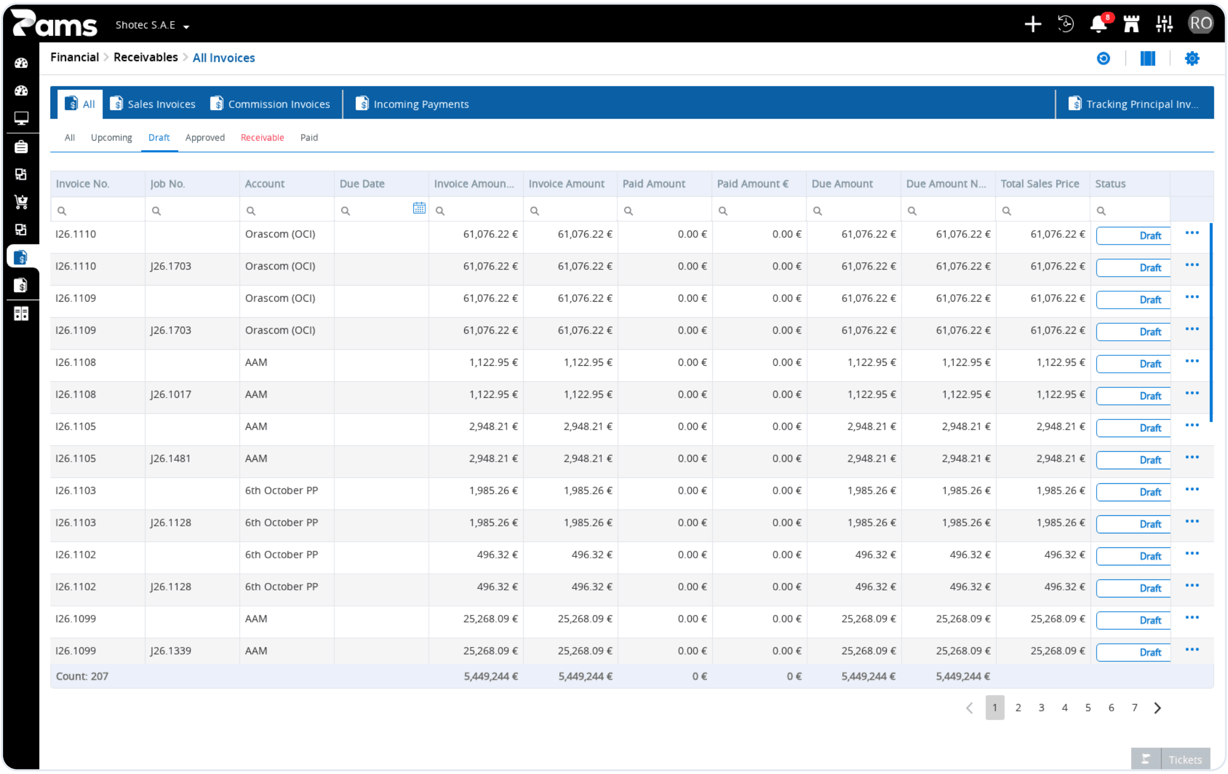
For commission invoices, **Awaiting Principal Payoff** is available as an additional status
view. The **Due/Overdue** filter opens the Due list; read the row status to distinguish **Due**
from **Overdue**.

4. Use the invoice number and status in a row to identify the record.
5. Choose the list tool that matches your purpose.

If you need to…	Select
Reload the list	**Refresh**
Review list-layout choices	**Table Layout**
Open list settings	**Settings**

6. Select **Open** to open the invoice.
7. If you need the related sales job, select **Open job page**.
8. If you need the invoice in another browser tab, select **Open in new tab**.
9. In **Settings**, select **Export** when you need a file of the current list.
10. In the export dialog titled `Exporting List:`, choose **Export to Excel** or **Export to PDF**.
11. Select **Export**.

If there are no rows to export, the list reports `NO Data to Export`.



Result: The invoice list is open at the selected invoice type and status position.

If the invoice list is still loading, its invoice columns are not available yet. The toolbar can still display **Refresh**, **Table Layout**, and **Settings** while the list loads. If a status or invoice-type choice is unavailable, use a choice that is displayed in the list.

Read the invoice workspace

An invoice record brings together account and date information, invoice amounts, approval actions,
payment areas, and history for one invoice.

The header fields are `Account`, `Invoice Date`, `Invoicing Address`, `Payment Period`, `Issued By`, `Vendor Order No.`, `External invoice no.`, `Client`, `Client Order No.`, `Order Date`, `Delivery Date`, `Delivery Term`, `Payment Method`, `L/C Number`, `Freight No.`, and `Invoice Note`. **Invoicing Address** and **Issued By** are required by the form rules.

The amount area includes **Invoice amount**, Total taxes, Total incl. tax, **Paid Amount**, **Deductions**, and **Due amount**. For sales, additional, commission-additional, and account
invoices, due amount is total after taxes minus paid and deducted amounts.

Area	Use it to…
Attachment	Review attached files
Tasks	Review invoice tasks
Activities	Review invoice activities
(principal Invoice)	Continue to the related principal invoice
Last Modifications	Review invoice history

The status marker identifies **Draft**, **Awaiting Approval**, **Approved**, **Due**, **Overdue**, or **Paid**. The list can use the available list setup, so use the headers visible in your list.

The saved-invoice action area provides **Save** and **Save and Close** when editing is allowed.
They are disabled when there are no changes or while saving.

When you need a new invoice rather than an existing record, continue to Choose an invoice creation route.

Choose an invoice creation route

The finance invoice area provides separate entry points for account invoices and additional
invoices. Field-by-field entry belongs in Create an Account Invoice.

Prerequisites

- You know whether you are creating an account invoice or an additional invoice.
- You have the invoice information required by the selected form.

Steps

1. Open the invoice creation choices.
2. Choose the route that matches the document you need.

If you need to…	Choose
Create an account invoice	**Account Invoices**
Create an additional invoice	**Additional Invoices**

3. Continue the detailed entry in Create an Account Invoice.

If the account-invoice entry displays **Invoicing Address** and then returns to the home or
dashboard surface, the invoice form is not available from that entry. If the additional-invoice
entry returns to the home surface, the invoice form is not available from that entry. Return to
Financial and open the invoice area again.

The account-invoice item grid uses **Item**, **Unit**, **Quantity**, **Unit Price**, Discount, **Item Price**, **Tax**, and **Currency Code**. Quantity accepts 1 through 999,999; unit price, sales price, and tax must be greater than 0; and discount ranges from 0 through 100.

For a new account invoice, the application starts the invoice in **Draft**, uses the signed-in
user's currency, and creates one initial item row. Changing the invoice currency applies the new
currency code and symbol to every item and recalculates the items.

After entering the invoice, continue with Request and complete approval
when the invoice is ready for approval.

Result: The selected invoice creation route is open for detailed invoice entry.

Request and complete approval

Approval is the handoff from an invoice prepared for approval to an invoice ready for the next
finance action.

Approval and sending actions depend on the invoice type, current status, approval process, and
approval limit.

Prerequisites

- The invoice is **Draft**, **Released for Invoicing**, or **Awaiting Approval**, as applicable.
- An approval process applies.
- You have the permission required for the action.

Steps

1. Open the saved invoice and read its status marker.
2. Choose the action that matches your permission and the current status.

If…	Select
The invoice is **Draft** or **Released for Invoicing** and you cannot approve it	**Request approval**
The invoice is **Draft**, **Released for Invoicing**, or **Awaiting Approval** and you can approve it	**Approve**
The invoice is **Awaiting Approval** and you need to withdraw the request	**Cancel request for approval**
The invoice is **Awaiting Approval** and you can reject it	**Reject approval request**
The invoice is **Approved** and must return to draft	**Consider as not approved**

3. Read the status marker after the action completes.

   A successful status update reports `Invoice updated successfully`. If the approval limit does
   not allow approval, the application reports `This invoice exceeds your approval limit`.

Result: The invoice status marker shows the status produced by the selected approval action.

Follow Due, Overdue, and Paid branches

Payment status tells you whether an invoice is still due, has passed its payment period, or has no
remaining amount due.

Prerequisites

- You have a saved invoice.
- You can open the invoice's amount area and payment details, including **Paid Amount**,
  Deductions, and **Due amount**.
- The invoice is **Approved** or otherwise eligible for the payment-status branch.
- The invoice type and approval state permit the sent action you need.

Steps

1. Open the invoice and read **Due amount**.
2. Read the payment period associated with the invoice.
3. Read the paid amount and deductions shown in the amount area.
4. Choose the status that matches the due amount and payment period.

If…	Choose
The due amount is zero or less	**Paid**
The payment period has passed and the due amount remains	**Overdue**
The payment period has not passed and the due amount remains	**Due**

5. Select the sent action that matches the invoice type and approval state.

If you need to…	Select
Record that the invoice was sent to the principal	**Consider as sent to principal**
Record that the invoice was sent to the client	**Consider as sent to client**
Record that it was not sent to the principal	**Consider as not sent to principal**
Record that it was not sent to the client	**Consider as not sent to client**

6. Choose **Due**, **Overdue**, or **Paid** in the invoice list.

Result: The invoice appears under the status that matches its due amount and payment timing;

if the status or action differs, open When an invoice action does not work.

When an invoice action does not work

Use this table when a save, approval, validation, permission, or route result differs from the
expected invoice action.

What you see	What it means	What to do
`Check validation`	Invoice validation stopped the action.	Review required fields and item values before saving again.
`This field is required`	A required value is empty.	Complete the field marked as required.
`Invalid input. The value must be greater than 0 and cannot exceed 999,999.00`	A numeric value is outside the permitted range.	Enter a value greater than 0 and no greater than 999,999.00.
`Invalid input. Please enter a non-negative value`	A numeric value is negative.	Enter zero or a positive value.
`Invoicing Address is required.`	**Invoicing Address** is empty.	Enter the invoicing address.
`Issued By is required.`	**Issued By** is empty.	Select the person who issued the invoice.
`Quantity must be between 1 and 999,999.`	Quantity is outside the permitted range.	Enter a quantity from 1 through 999,999.
`Unit price must be greater than 0.`	Unit price is invalid.	Enter a positive unit price.
`Sales price must be greater than 0.`	Sales price is invalid.	Enter a positive sales price.
`Tax must be greater than 0.`	Tax is invalid.	Enter a positive tax value.
`Discount must be between 0 and 100.`	Discount is outside the permitted range.	Enter a discount from 0 through 100.
`Invoice failed to save`	The save did not complete.	Review the values and select **Save** again.
`Invoice saved successfully`	The invoice save completed.	Continue with the saved invoice status and related areas.
`Invoice updated successfully`	The invoice status update completed.	Read the new status marker before continuing.

What you see	What it means	What to do
`Your request was completed successfully`	A shared request completed successfully.	Continue from the updated invoice area.
`This invoice exceeds your approval limit`	Your approval limit does not allow the action.	Use the approval route available to your role.
`Action not allowed`	The selected action is not permitted.	Use the action available for the status and your permission.
`An error occurred while processing your request`	The operation returned an error.	Return to the invoice and retry the permitted action.
`Forbidden characters detected. Please remove them and try again.`	A value contains forbidden characters.	Remove them and retry.
`Upgrade needed`	The required subscription feature is not available.	Ask an administrator to review the subscription before using the feature.
`Please enter at least one email`	The email action has no recipient.	Enter at least one recipient before saving the email action.
`Freight typies failed to load`	Freight types could not be loaded.	Return to the invoice and retry after the freight types are available.

Out of scope messages

These exact messages belong to related pages rather than invoice-action recovery:

Message	Owning page or area
`This action is only allowed if you belong to that branch`	Activities and activity printing
`One topic and at least one note is required`	Activities
`There is no topic to print`	Activities
`You already have a contact with this name`	Contacts
`Just '_''-''.' And '&' Characters Accepted`	Shared file/contact input

If the selected creation route returns you to the finance workspace, return to **Financial** and
open the invoice area again before continuing.

Continue with the next finance task

The saved invoice hands work to payment, principal-invoice, purchase-invoice, and related-record areas.

Prerequisites

- You have a saved invoice.
- You can open the applicable finance workspace.

1. Choose the related area that matches your next task.

If you need to…	Open or use
Review the related principal invoice	**(principal Invoice)**, then Principal invoices
Work with purchase invoices or outgoing payments	Payables
Review related saved-record information when the area is available	**Attachment**, `Tasks`, `Activities`, or **Last Modifications**

Result: You know which finance page or saved-record area owns the next action.