

Invoice Settings

July 29, 2026

Invoice Settings

Applications > Configurations > Finance Settings

Configuration > Invoice settings [Save] [Save and Close] [X]

Banks
Bank accounts
L/Gs facilities
Invoice settings

Shotec S.A.E.

Auto generate
☐ Editable proforma
☐ Non editable Invoice

Shotec Gulf
Shotec GmbH
Shotec IP GmbH
Cronitec

Last Modifications
The audit log provides you with a chronological sequence of actions performed by the users

Created On : - By

Filter by user Filter by field

21 Sep 2023 - 12:00 PM	S-Bohnacker	1 Changes
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[Tickets]

Invoice Settings — Configurations > Finance Settings > Invoice Settings

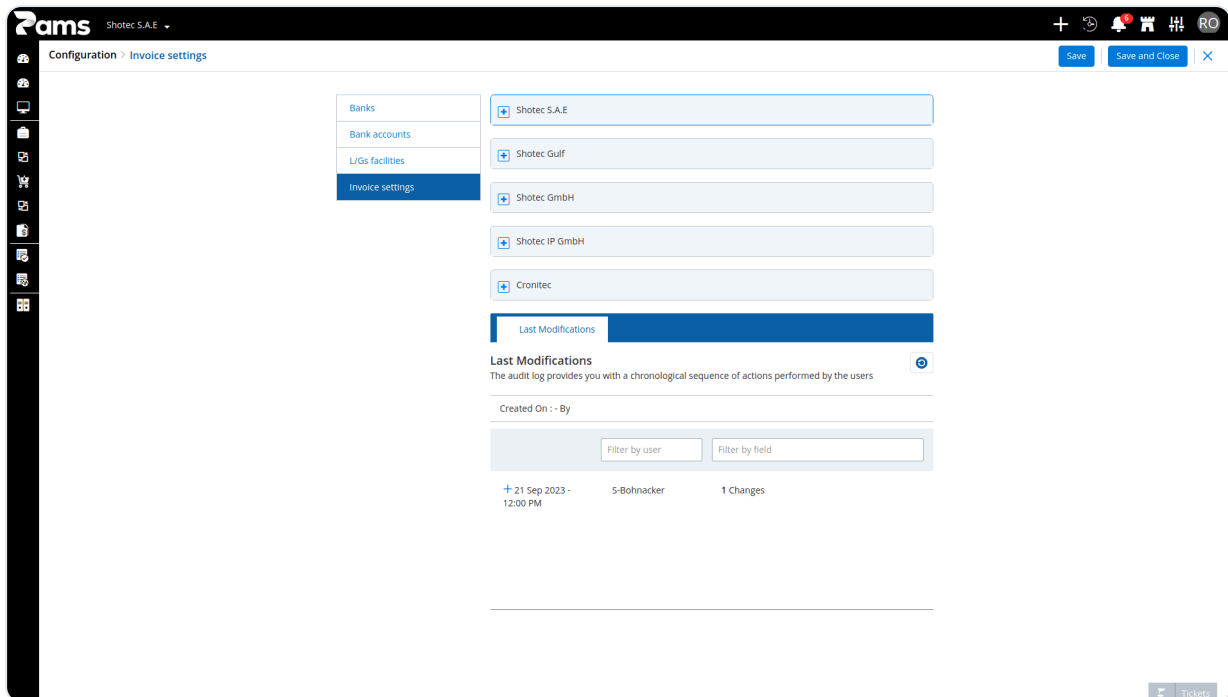
Overview

Invoice Settings centralize the finance configuration displayed for the available business entities. Finance officers, accountants, account managers, and project managers use this page when they need to review or maintain invoice-related settings before processing finance work.

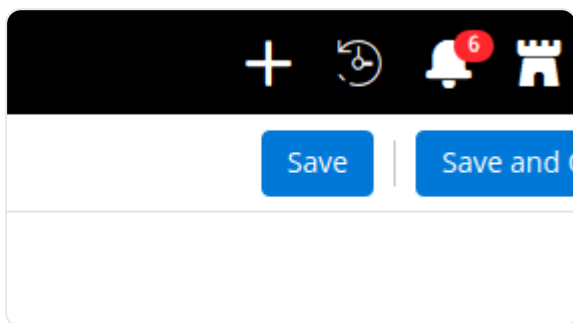
Use the company tabs to work in the appropriate entity context. Review the current selection and filters carefully before saving changes.

Settings

Open **Configurations > Finance Settings > Invoice Settings** to access the configuration record.



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The page provides the following settings and supporting controls:

Setting or control	Use
SalesProcessApproval	Review or maintain the setting labelled SalesProcessApproval.
Selected items	Displays the items currently selected on the page.
Filter by user	Use this filter to limit the displayed information by user.
Filter by field	Use this filter to limit the displayed information by field.
files[]	Displays files associated with the configuration record.

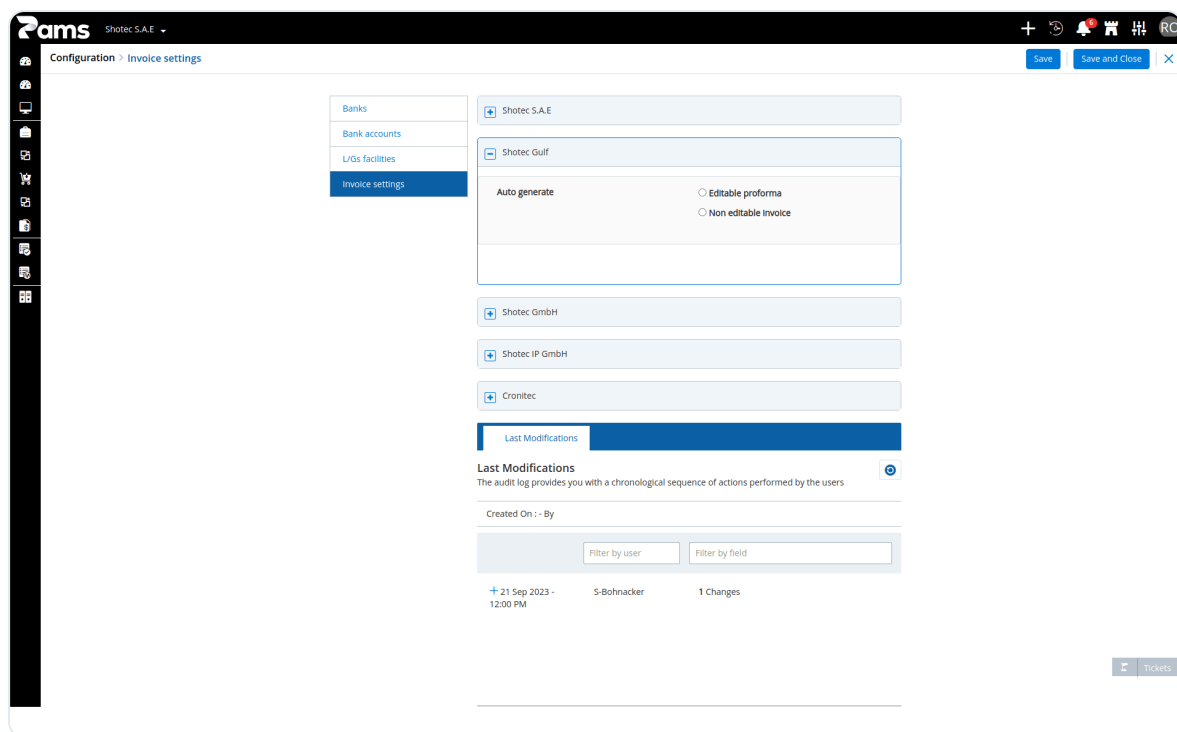
Setting or control	Use
Attach	Attach a file to the configuration record when supporting documentation is required.
logHistory	Open the available history action when you need to review recorded history.
Update icon (icn icn-update)	Use the available update action when required by your operating procedure.
Tickets	Open the available ticket action when follow-up is required.
Ok	Confirm the current dialog or action when this button is displayed.
Save	Save changes and remain on the Invoice Settings page.
Save and Close	Save changes and close the current page.

Note: The page does not display field help text or value options for **SalesProcessApproval**. Confirm the required value with your finance policy before changing this setting.

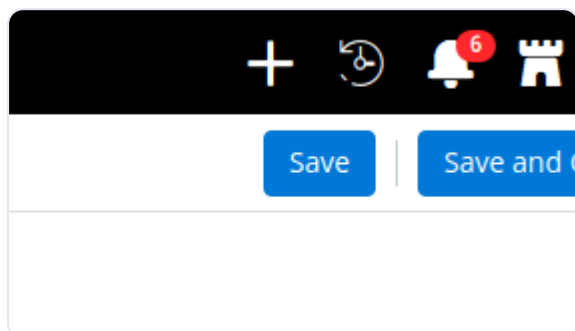
Before editing, select the correct company tab. A setting saved under one company tab should be reviewed separately in the other company contexts.

Workflow

1. Open **Configurations > Finance Settings > Invoice Settings**. Confirm that you are working on the required invoice-settings record before making changes.



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2. Decide which company context requires review. Select the relevant company tab, starting with **Shotec S.A.E** or **Shotec Gulf** as appropriate. Continue to the other available tabs when the same review is required across all entities.

The tabs provide separate stages of the Invoice Settings page. No control is listed for transferring a record from one tab to another; use each tab to review its displayed settings independently.

3. Decide whether you need to narrow the information shown before editing:
 - Use **Filter by user** when you need to focus on information associated with a particular user.
 - Use **Filter by field** when you need to focus on a particular field.
 - Review **Selected items** after applying filters to confirm the current selection.

4. Review or update **SalesProcessApproval** only when you have confirmed the intended finance process. If supporting evidence is needed, select **Attach** and add the relevant file to **files[]**.

Warning: Do not save a change until you have checked the active company tab and the current selection. The screen provides separate company contexts, and no transfer action is available to correct a change by moving it between tabs.

5. Decide how to finish the update:
 - Select **Save** when you need to keep the page open for further review, filtering, attachments, or updates in another tab.
 - Select **Save and Close** when the current review is complete and no further work is required.
6. If you need to review supporting activity after saving, use **logHistory**. If your process requires an issue or follow-up record, use **Tickets**. Confirm any displayed dialog with **Ok**.

Shotec S.A.E

The **Shotec S.A.E** tab contains the Invoice Settings context for Shotec S.A.E. Use this stage to review the displayed **SalesProcessApproval** setting, apply **Filter by user** or **Filter by field** where needed, and verify **Selected items** before saving.

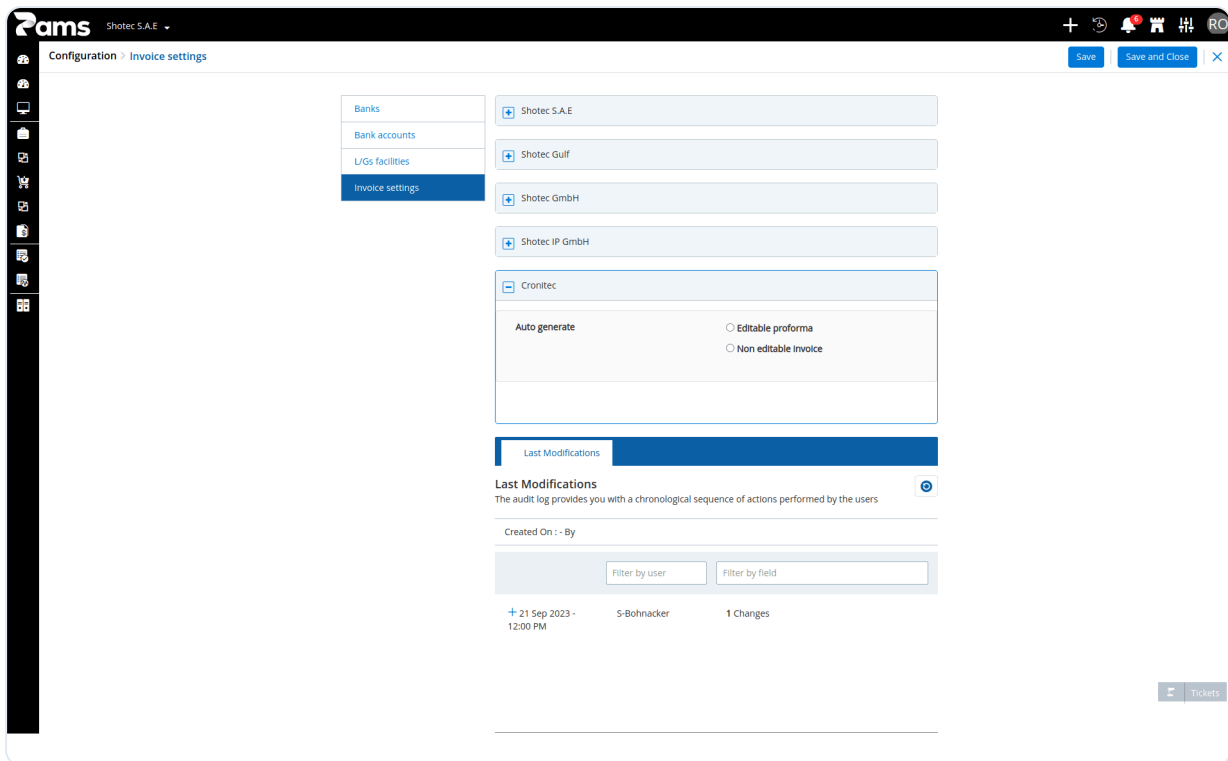
The available screen information does not identify a control that moves settings records into or out of this tab. Save changes within this company context using **Save** or **Save and Close**.

Shotec Gulf

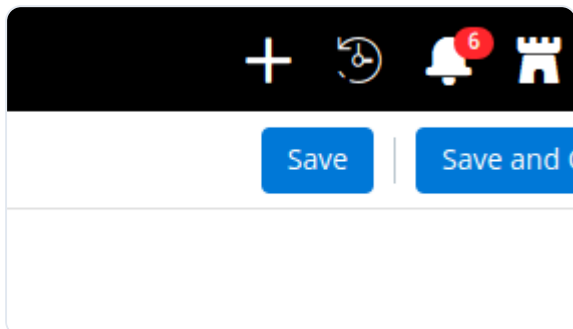
The **Shotec Gulf** tab contains the Invoice Settings context for Shotec Gulf. Use it to review the current selection, maintain **SalesProcessApproval**, and attach supporting files through **Attach** when required.

No listed action transfers records between this tab and another company tab. Use **Save** to retain the current page for continued work, or **Save and Close** after completing the Shotec Gulf review.

Cronitec



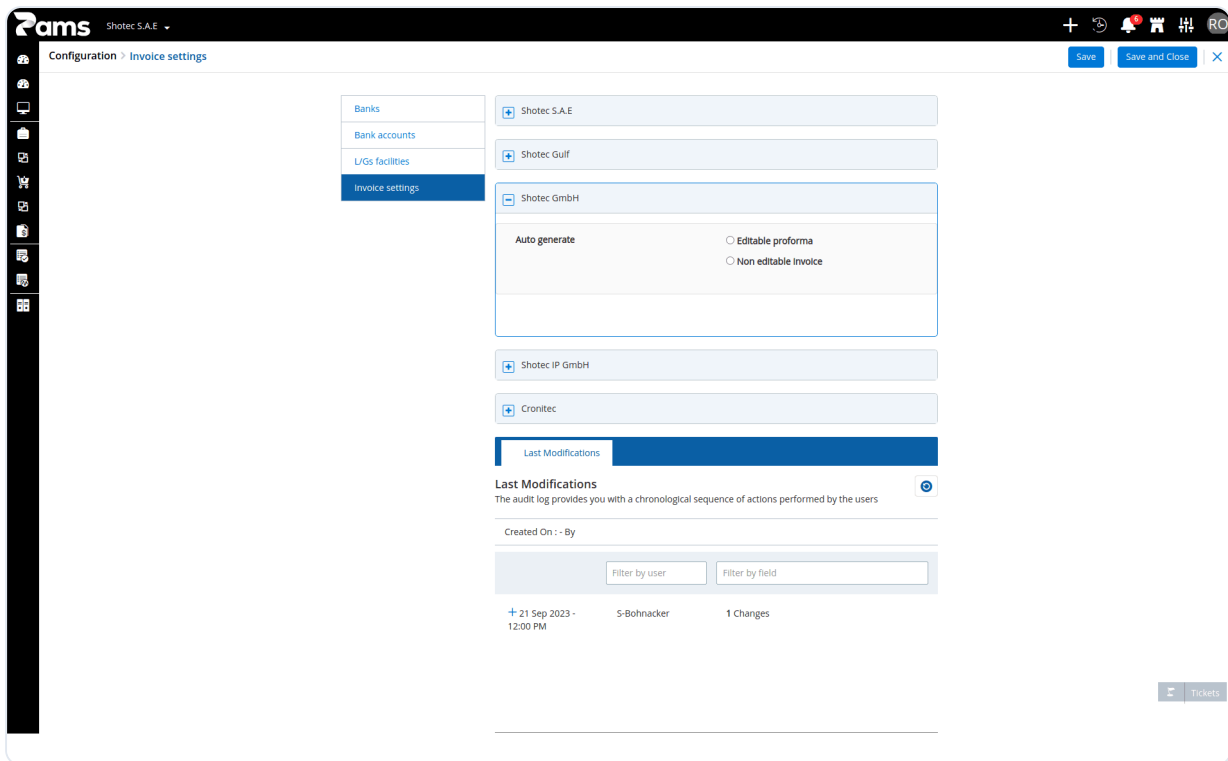
Invoice Settings — Configurations › Finance Settings › Invoice Settings



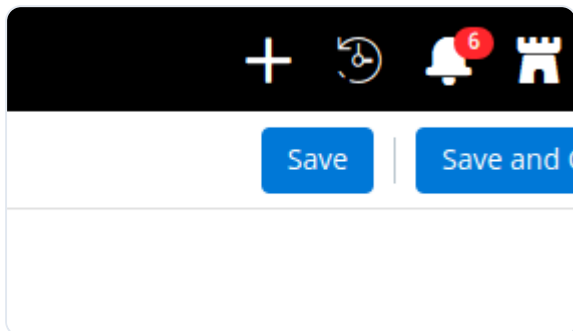
The **Cronitec** tab provides the Invoice Settings context for Cronitec. Review **Selected items** and the filter criteria before changing any displayed setting. Use **files[]** to confirm that supporting files are present when documentation is required.

No record-movement control is listed for this stage. Save the reviewed configuration directly in the Cronitec tab.

Shotec GmbH



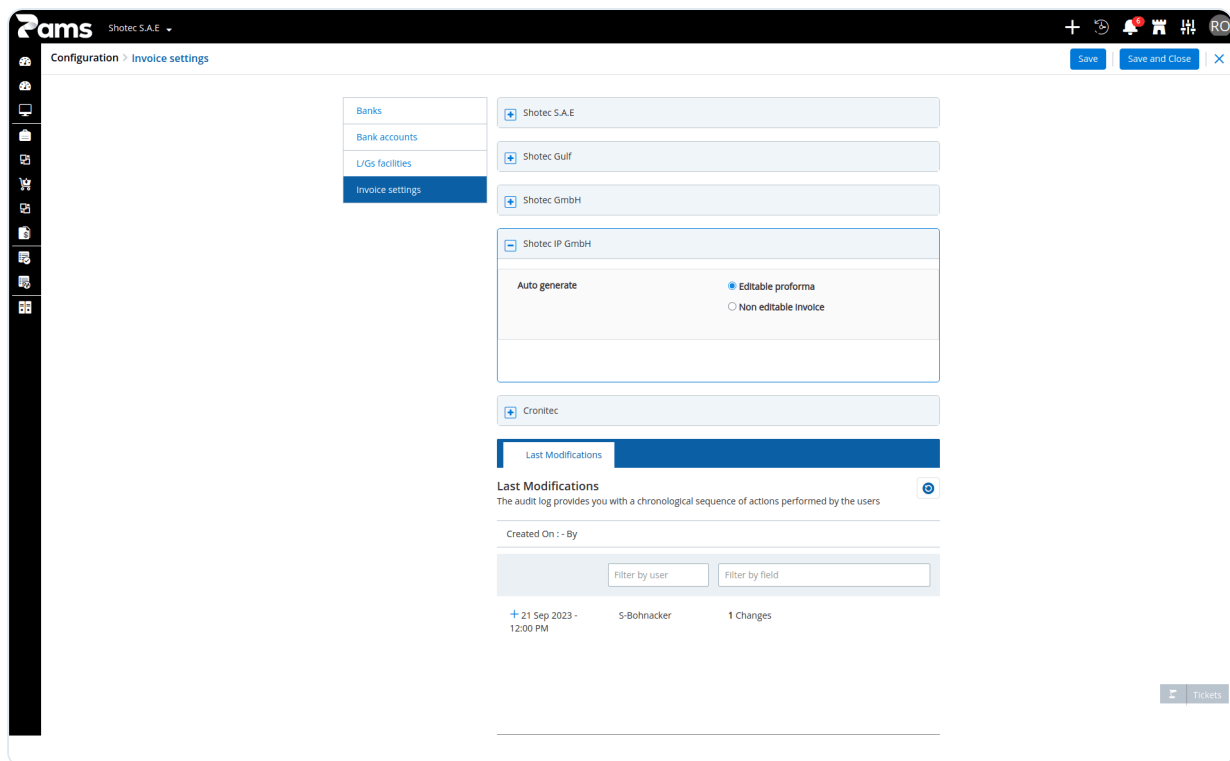
Invoice Settings — Configurations › Finance Settings › Invoice Settings



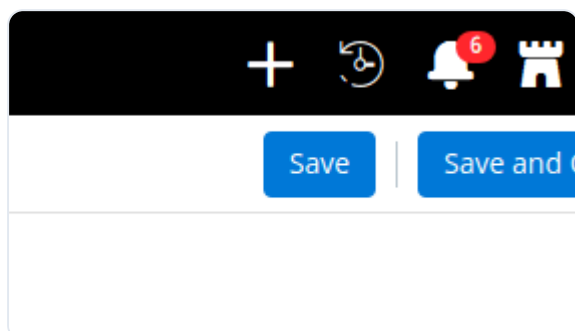
The **Shotec GmbH** tab provides the Invoice Settings context for Shotec GmbH. Use the available filters to focus the displayed information, then review or maintain **SalesProcessApproval** in this company context.

The available controls do not specify a transition into or out of this tab. Complete the required changes and select **Save** or **Save and Close**.

Shotec IP GmbH



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The **Shotec IP GmbH** tab contains the Invoice Settings context for Shotec IP GmbH. Use this stage to confirm the relevant selection, review the displayed setting, and retain supporting documentation through **Attach** where required.

No listed control moves a record between company tabs. Save the setting in the active Shotec IP GmbH context after completing the review.

Examples

A finance officer needs to review the invoice setting for Shotec Gulf after an account manager requests confirmation that the sales process approval setting is correctly recorded.

1. The finance officer opens **Configurations > Finance Settings > Invoice Settings** and selects the **Shotec Gulf** tab.
2. The finance officer enters the relevant account manager in **Filter by user** and uses **Filter by field** to focus on **SalesProcessApproval**.
3. The finance officer checks **Selected items** to ensure that the displayed item is the intended one.
4. The finance officer reviews **SalesProcessApproval** against the approved finance process. If the request includes an approval email or internal document, the finance officer selects **Attach** so that the file is listed in **files[]**.
5. The finance officer selects **Save** to retain the update while checking the remaining company tabs. After confirming that no further change is required, the finance officer selects **Save and Close**.

Tips

Tip: Use **Save** rather than **Save and Close** when you need to compare invoice settings across multiple company tabs.

Note: Use **logHistory** after an update when you need to review the available recorded history for the configuration.

Warning: Treat each company tab as a separate review context. Do not assume that a change made in Shotec S.A.E is also reflected in Shotec Gulf, Cronitec, Shotec GmbH, or Shotec IP GmbH.

Troubleshooting

Symptom	Likely cause	Fix
The expected information is not displayed.	A filter is limiting the current view.	Review Filter by user and Filter by field , then confirm the resulting Selected items .
A file is not available with the configuration.	The supporting document has not been attached to the current record.	Select Attach and confirm that the file appears in files[] .

Symptom	Likely cause	Fix
You are unsure whether the correct company configuration was updated.	The active company tab was not confirmed before saving.	Open the relevant company tab, review its displayed settings, and use logHistory where available.
You need to continue working after an update, but the page has closed.	Save and Close was selected.	Reopen Configurations > Finance Settings > Invoice Settings , select the required company tab, and continue the review.

Related pages

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