

Settings

Before reviewing receivables, set up a layout that shows the information most relevant to your work. Layouts control the saved arrangement of columns on the Receivables screen.

1. Open **Finance** from the main application navigation, then select **Receivables**.

Invoice No.	Job No.	Account	Due date	Invoice amount in €	Invoice amount	Paid amount	Paid amount in €	Due amount	Due amount in €	Total sales price	Status
i26.1054	j26.1576	AAM		0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	Draft ...
i26.1053	j26.1576	AAM		0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	Draft ...
i26.1051	j26.1223	6th October PP		13,505.63 €	13,505.63 €	0.00 €	0.00 €	13,505.63 €	13,505.63 €	13,505.63 €	Draft ...
i26.1041	j26.1534	GAFRD		698.18 €	793.33 \$	0.00 \$	0.00 €	793.33 \$	698.18 €	793.33 \$	Draft ...
i25.1015	j25.1105	ColTech		1,000,000.00 €	1,000,000.00 €	0.00 €	0.00 €	1,000,000.00 €	1,000,000.00 €	1,000,000.00 €	Draft ...
i25.1010	sj21.1306	Shotec S.A.E		0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	11,000.00 €	Draft ...
i25.1009	sj21.1306	Shotec S.A.E		10,000.00 €	10,000.00 €	0.00 €	0.00 €	10,000.00 €	10,000.00 €	10,000.00 €	Draft ...
i25.1008	sj21.1306	Shotec S.A.E		0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	Draft ...
i25.1007	j25.1063	GPC		10,000.00 €	10,000.00 €	0.00 €	0.00 €	10,000.00 €	10,000.00 €	10,000.00 €	Draft ...
i25.1006	j25.1054	ColTech		100,000.00 €	100,000.00 €	0.00 €	0.00 €	100,000.00 €	100,000.00 €	100,000.00 €	Draft ...
i25.1000	j23.1479	Exxon Mobil		0.00 €	110.00 null	0.00 null	0.00 €	110.00 null	0.00 €	100.00 null	Draft ...
i24.1182	j24.1048	Chevron		13,038.95 €	14,100.66 \$	0.00 \$	0.00 €	14,100.66 \$	13,038.95 €	13,300.00 \$	Draft ...
i24.1181	j21.2218	Intech		22,761.81 €	22,761.81 €	0.00 €	0.00 €	22,761.81 €	22,761.81 €	22,761.81 €	Draft ...
i24.1178	j24.1048	Chevron		187,419.21 €	202,680.00 \$	0.00 \$	0.00 €	202,680.00 \$	187,419.21 €	180,000.00 \$	Draft ...
i24.1177	sj21.2015	Shotec S.A.E		5,250.00 €	105,000.00 -٠٢	0.00 -٠٢	0.00 €	105,000.00 -٠٢	5,250.00 €	105,000.00 -٠٢	Draft ...
i24.1176	j23.1479	Exxon Mobil		57,492.01 €	1,889,319.98 -٠٢	0.00 -٠٢	0.00 €	1,889,319.98 -٠٢	57,492.01 €	1,657,298.23 -٠٢	Draft ...
i24.1172	sj24.2056	Petrobrel		17,015.74 €	17,015.74 €	0.00 €	0.00 €	17,015.74 €	17,015.74 €	17,015.74 €	Draft ...
Count: 79				2,548,781 €	2,548,781 €	0 €	0 €	2,548,781 €	2,548,781 €		

Finance — Financial > Receivables

2. Decide whether to use the standard column arrangement or a saved layout:
 - Select **Standard Layout** to return to the standard display.
 - Select **icn icn-layout** to access layout actions.
 - Select **Columns Chooser** to choose the columns displayed in the receivables list.
3. To create a reusable display, select **Add Layout** and enter a value in **Layout name**.
4. Select **Save** to save the new layout. Select **Cancel** if you do not want to keep the layout changes.

Tip: Create a separate layout when different teams need different receivables views. For example, a project manager may focus on job numbers, while a finance officer may focus on accounts, due dates, and invoice amounts.

- To revise an existing saved layout, make the required column changes and select **Update Current**.
- To remove a saved layout that is no longer required, select **Delete Current** or **Delete**, as applicable.

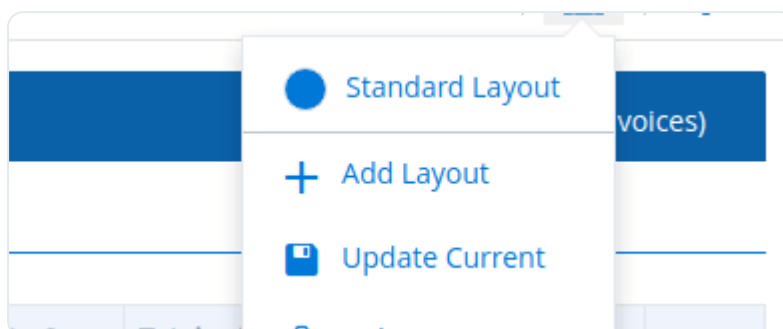
Warning: Deleting a layout removes that saved layout choice. Use **Standard Layout** when you only need to temporarily return to the default display.

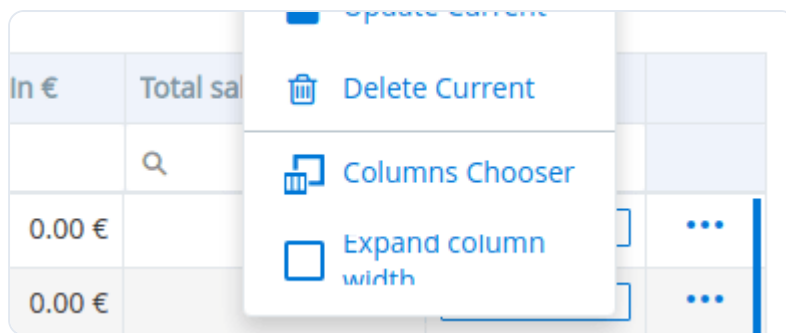
Workflow

- Open the receivables work area by selecting **Finance**, then **Receivables**.

Invoice No.	Job No.	Account	Due date	Invoice amount in €	Invoice amount	Paid amount	Paid amount in €	Due amount	Due amount in €	Total sales
i26.1054	j26.1576	AAM		0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	
i26.1053	j26.1576	AAM		0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	
i26.1051	j26.1223	6th October PP		13,505.63 €	13,505.63 €	0.00 €	0.00 €	13,505.63 €	13,505.63 €	13,505.63 €
i26.1041	j26.1534	GAFRD		698.18 €	793.33 \$	0.00 \$	0.00 €	793.33 \$	698.18 €	793.33 \$
i25.1015	j25.1105	ColTech		1,000,000.00 €	1,000,000.00 €	0.00 €	0.00 €	1,000,000.00 €	1,000,000.00 €	1,000,000.00 €
i25.1010	sj21.1306	Shotec S.A.E		0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	11,000.00 €
i25.1009	sj21.1306	Shotec S.A.E		10,000.00 €	10,000.00 €	0.00 €	0.00 €	10,000.00 €	10,000.00 €	10,000.00 €
i25.1008	sj21.1306	Shotec S.A.E		0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €
i25.1007	j25.1063	GPC		10,000.00 €	10,000.00 €	0.00 €	0.00 €	10,000.00 €	10,000.00 €	10,000.00 €
i25.1006	j25.1054	ColTech		100,000.00 €	100,000.00 €	0.00 €	0.00 €	100,000.00 €	100,000.00 €	100,000.00 €
i25.1000	j23.1479	Exxon Mobil		0.00 €	110.00 null	0.00 null	0.00 €	110.00 null	0.00 €	100.00 null
i24.1182	j24.1048	Chevron		13,038.95 €	14,100.66 \$	0.00 \$	0.00 €	14,100.66 \$	13,038.95 €	13,300.00 \$
i24.1181	j21.2218	Intech		22,761.81 €	22,761.81 €	0.00 €	0.00 €	22,761.81 €	22,761.81 €	22,761.81 €
i24.1178	j24.1048	Chevron		187,419.21 €	202,680.00 \$	0.00 \$	0.00 €	202,680.00 \$	187,419.21 €	180,000.00 \$
i24.1177	sj21.2015	Shotec S.A.E		5,250.00 €	105,000.00 ₪	0.00 ₪	0.00 €	105,000.00 ₪	5,250.00 €	105,000.00 ₪
i24.1176	j23.1479	Exxon Mobil		57,492.01 €	1,889,319.98 ₪	0.00 ₪	0.00 €	1,889,319.98 ₪	57,492.01 €	1,657,298.23 ₪
i24.1172	sj24.2056	Petrobrel		17,015.74 €	17,015.74 €	0.00 €	0.00 €	17,015.74 €	17,015.74 €	17,015.74 €
Count: 79				2,548,781 €	2,548,781 €	0 €	0 €	2,548,781 €	2,548,781 €	

Finance — Financial > Receivables





2. Choose the invoice scope before reviewing the list:

- Select **Account Invoices** to work from the account invoice area.
- Select **All** when you need the complete available invoice list.
- Select **Sales Invoices** when your review is limited to sales invoice records.

The list displays receivable invoice information, including **Invoice No.**, **Job No.**, **Account**, **Due date**, and invoice amount columns in euros.

3. Decide whether you need a specific record or a general review:

- For a specific invoice, job, or account, enter the available identifier in **Search**.
- For a general review, leave **Search** empty and review the records currently displayed.

4. Decide whether the current columns support the review:

- Select **Columns Chooser** to adjust the visible columns.
- Select **Standard Layout** if you need to restore the standard arrangement.
- Select **icn icn-layout**, then use **Add Layout** and **Save** if the adjusted view should be reused.
- Select **Update Current** if you are revising the current saved layout.

5. Refresh the displayed receivables when you need the latest available list by selecting **icn-update**.

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Invoices > Sales Invoices + Account Invoices 🔗 🔧

All Sales Invoices Commission Invoices Account Invoices (principal Invoices)

All Upcoming Draft Approved Due Overdue Paid

Invoice No.	Job No.	Account	Due date	Invoice amount in €	Invoice amount	Paid amount	Paid amount in €	Due amount	Due amount in €	Total sales price	Status
Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q
I26.1054	j26.1576	AAM		0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	Draft ⋮
I26.1053	j26.1576	AAM		0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	Draft ⋮
I26.1051	j26.1223	6th October PP		13,505.63 €	13,505.63 €	0.00 €	0.00 €	13,505.63 €	13,505.63 €	13,505.63 €	Draft ⋮
I26.1041	j26.1534	GAFRD		698.18 €	793.33 \$	0.00 \$	0.00 €	793.33 \$	698.18 €	793.33 \$	Draft ⋮
I25.1015	j25.1105	ColTech		1,000,000.00 €	1,000,000.00 €	0.00 €	0.00 €	1,000,000.00 €	1,000,000.00 €	1,000,000.00 €	Draft ⋮
I25.1010	sj21.1306	Shotec S.A.E		0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	11,000.00 €	Draft ⋮
I25.1009	sj21.1306	Shotec S.A.E		10,000.00 €	10,000.00 €	0.00 €	0.00 €	10,000.00 €	10,000.00 €	10,000.00 €	Draft ⋮
I25.1008	sj21.1306	Shotec S.A.E		0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €	Draft ⋮
I25.1007	j25.1063	GPC		10,000.00 €	10,000.00 €	0.00 €	0.00 €	10,000.00 €	10,000.00 €	10,000.00 €	Draft ⋮
I25.1006	j25.1054	ColTech		100,000.00 €	100,000.00 €	0.00 €	0.00 €	100,000.00 €	100,000.00 €	100,000.00 €	Draft ⋮
I25.1000	j23.1479	Exxon Mobil		0.00 €	110.00 null	0.00 null	0.00 €	110.00 null	0.00 €	100.00 null	Draft ⋮
I24.1182	j24.1048	Chevron		13,038.95 €	14,100.66 \$	0.00 \$	0.00 €	14,100.66 \$	13,038.95 €	13,300.00 \$	Draft ⋮
I24.1181	j21.2218	Intech		22,761.81 €	22,761.81 €	0.00 €	0.00 €	22,761.81 €	22,761.81 €	22,761.81 €	Draft ⋮
I24.1178	j24.1048	Chevron		187,419.21 €	202,680.00 \$	0.00 \$	0.00 €	202,680.00 \$	187,419.21 €	180,000.00 \$	Draft ⋮
I24.1177	sj21.2015	Shotec S.A.E		5,250.00 €	105,000.00 ⚠	0.00 ⚠	0.00 €	105,000.00 ⚠	5,250.00 €	105,000.00 ⚠	Draft ⋮
I24.1176	j23.1479	Exxon Mobil		57,492.01 €	1,889,319.98 ⚠	0.00 ⚠	0.00 €	1,889,319.98 ⚠	57,492.01 €	1,657,298.23 ⚠	Draft ⋮
I24.1172	sj24.2056	Petrobel		17,015.74 €	17,015.74 €	0.00 €	0.00 €	17,015.74 €	17,015.74 €	17,015.74 €	Draft ⋮
Count: 79				2,548,781 €	2,548,781 €	0 €	0 €	2,548,781 €	2,548,781 €		

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[Tickets](#)

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6. Decide whether the displayed results need to be shared or used outside the application:

- Select **Export** to export the current receivables view.
- Before exporting, confirm that the required invoice scope, search criteria, and columns are displayed.

Note: The available Receivables controls support viewing, searching, arranging, refreshing, and exporting invoice information. No invoice confirmation, payment, collection, or status-change action is available from the listed controls on this screen.

Examples

A finance officer needs a list of sales invoice receivables for account AAM and wants to review the associated job numbers and due dates before preparing a follow-up report.

1. Open **Finance**, then select **Receivables**.
2. Select **Account Invoices**, then select **Sales Invoices** to limit the view to sales invoice records.
3. In **Search**, enter **AAM** to locate the account's visible invoice records.

4. Review the resulting rows using **Invoice No.**, **Job No.**, **Account**, **Due date**, and the invoice amount columns in euros.
5. If the required fields are not visible, select **Columns Chooser** and adjust the display. To retain the arrangement for future account reviews, select **icn icn-layout**, choose **Add Layout**, enter **Sales Receivables Follow-up** in **Layout name**, and select **Save**.
6. Select **Export** to export the filtered sales invoice list for the follow-up report.

Tip: Apply the search and select the correct invoice scope before exporting. The export reflects the receivables view currently displayed.

Tips

Tip: Use **All** for a broad receivables review and **Sales Invoices** when you only need sales invoice records.

Note: Use **Update Current** only when you intend to change the saved layout currently in use. Use **Add Layout** when you want to preserve the current layout and create another version.

Warning: Do not assume that an empty or zero displayed invoice amount explains the reason for the amount. This screen provides the invoice information shown in the list; use the available invoice references, account, and job number to identify the record for further review.

Troubleshooting

Symptom	Likely cause	Fix
The required invoice does not appear in the list.	The wrong invoice scope is selected, or the search value is too restrictive.	Select All or Sales Invoices as appropriate, clear or revise Search , and select icn-update .
The required job, account, or due-date information is not visible.	The current layout does not include the required columns.	Select Columns Chooser and adjust the visible columns, or select Standard Layout .

Symptom	Likely cause	Fix
A layout change is not retained for later use.	The layout was not saved or updated.	Use Add Layout and Save for a new layout, or select Update Current for the active saved layout.
The exported results do not match the intended review.	The current view was not filtered or arranged before export.	Set the correct scope, enter the required Search value, confirm the displayed columns, then select Export again.

Related pages

- [Financial — Overview](#)
- [Bank Guaranties](#)
- [Financial — Learning Path](#)