

Invoicing

How can I follow the payment of invoices?

In the invoice table (tab "Invoicing" ① > Menu "Invoices" ②) there is a column "UnPaid". In this column, the outstanding amount shows in red or if the invoice is paid the word "paid" in green.

If you click the amount ③, a popup will appear ④ where you can give in the payment for the invoice by clicking on new ⑤ (Invoices can also partially be paid, eg an advance.).

The screenshot shows the PlanManager interface. The 'Invoicing' tab is selected in the left sidebar (1). The 'Sales' menu is open (2). A popup window titled 'Transactions Invoice CJM2000052' is displayed. In this popup, the 'Owed' amount of € 23317.69 is highlighted (3). A 'New' button is visible (5). The background shows a table of invoices with columns for Number, Date, Name, Amount, and Unpaid status.

You will get a new popup where you can enter the amount, the date, the name of the party and a comment. After the entry, click on the Save icon to save the transaction. The pop-up will then close, and the transaction summary adjusts.

This screenshot shows the same PlanManager interface as the previous one, but with a 'New' sub-popup open over the 'New' button in the main popup. The sub-popup contains fields for 'Amount' (€ 23317.69), 'Paid On' (03-05-2022), 'Paid By', 'Payment Type' (Contant), and 'Comments'. A 'Save' icon (4) is at the bottom of the sub-popup. The background popup also shows the 'Owed' amount (3) and the 'New' button (2). The background table shows the 'Unpaid' amount for the selected invoice (1).

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