

Invoicing

How do I change my invoice numbers?

Introduction

Invoice numbers in planmanager are linked to the journal. You can have multiple journals.

Customizing

You can find a list of all your journals in the Invoice menu - Journals.

The screenshot shows the PlanManager web application. At the top, there's a navigation bar with tabs: Invoices, Claims, Creditnotes, Ledgers, Journals (highlighted), Discount, Accounting, Group invoice, Reminders, Standard Comments, Help, Workshop, Job, Planning, Report, Maintenance, System, Car Fleet, and Invoicing. Below the navigation bar, there's a 'Journal Editor' form on the left and a table of journals on the right. The 'Journal Editor' form has fields for Name, Code, Last Number, Default Selected, Type, and Location. The table has columns: Code, Name, Location, and Last Number. A green arrow points from the 'Journals' tab to the table, and another green arrow points from the 'Invoicing' tab to the 'Last Number' column.

Code	Name	Location	Last Number
✖	Credits bodyshop 1	Demo Repair Services	8001
✖	Credits bodyshop 2	All Car Repair	9000
✖	Sales bodyshop 1	Demo Repair Services	1003
✖	Sales bodyshop 2	All Car Repair	2002
✖	Schaduw		0

Click on a line to edit a journal. The last number field holds the last invoice number that was distributed. This means that if the last number is 1003, the next invoice will be numbered 1004.

The screenshot shows the PlanManager web application with the 'Journal Editor' form in edit mode. The 'Name' field is set to 'Sales bodyshop 1'. The 'Last Number' field is set to '1003', with a green arrow pointing to it from the left. The table of journals is the same as in the previous screenshot. A green arrow points from the 'Last Number' field to the '1003' value.

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On January 1, I change my numbers for the New Year

Your current number sequence is 201700605. However, you want the first invoice of 2017 to start at 201700001. You can simply modify your existing journal by putting in 201800000 to number your next invoice to 201800001

On January 1st I change my numbers back to 1.

An invoice number must be unique by definition, did you use for example invoice numbers 1 to 605 in 2017, you can't use these numbers in 2018.

You will then need to rename your journal in 2017 and create a new journal by clicking the new button. That way you can use the same invoice numbers again.

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