

# Draft Invoices

## Draft Invoices Approvals

Draft invoices are generated automatically (overnight) to help you get idea about your current invoicing to be sent to your clients.

The screenshot shows the 'atollon' software interface for 'Draft Invoice Approval'. The top bar includes the logo, search bar, and user information (Joe Admin, Your Organization). The main area displays a table of draft invoices with columns: Number, Taxation Date, Due Date, Provider, Client, Total Amount, and To be paid. A sidebar on the left shows filters: 'All' (666,396.76 EUR), 'For Approval' (28,583.15 EUR, highlighted with a green box), 'This Month' (7,486.33 EUR), 'Previous Month' (6,906.00 EUR), and 'Overdue' (634,273.00 EUR). Below the table, there are tabs for 'Time Sheets' and 'Billing Items', and a summary bar showing 'Total: 23,903.35 EUR Total with VAT: 28,583.15 EUR To be paid: 28,584.00 EUR'. The bottom section shows a table of billing items with columns: Icon, Price, Invoice ID, Type of ..., Date, Qty./Ti..., Descrip..., User, Context, Total, Curre..., Used fre..., and Chargeable. At the bottom right, there are buttons: 'Print to Email', 'Delete', 'Approve Draft', 'Postpone', and 'Avoid Billing'.

Number	Taxation Date	Due Date	Provider	Client	Total Amount	To be paid
	05/31/2014	06/29/2014	Best Provider	Best Provider	1,175.00 EUR	1,175.00 EUR
	05/31/2014	06/27/2014	Best Provider	Best Provider	17.00 EUR	17.00 EUR
	05/31/2014	06/14/2014	Best Provider	Best Provider	0.00 EUR	0.00 EUR
	05/30/2014	06/13/2014	Red Dwarf	Red Dwarf	1,554.00 EUR	1,554.00 EUR
	05/30/2014	06/13/2014	Best Provider	Best Provider	0.00 EUR	0.00 EUR
	05/30/2014	06/13/2014	Your Organization	Your Organization	1,200.00 EUR	1,200.00 EUR
	04/30/2014	06/29/2014	Best Provider	Best Provider	871.00 EUR	871.00 EUR
	04/30/2014	06/13/2014	Your Organization	Your Organization	6,000.00 EUR	6,000.00 EUR
	04/30/2014	06/27/2014	Best Provider	Best Provider	35.00 EUR	35.00 EUR
	03/31/2014	06/29/2014	Best Provider	Best Provider	600.00 EUR	600.00 EUR
	03/31/2014	06/13/2014	Your Organization	Your Organization	0.00 EUR	0.00 EUR

Icon	Price	Invoice ID	Type of ...	Date	Qty./Ti...	Descrip...	User	Context	Total	Curre...	Used fre...	Chargeable
	2.65		Project work	05/06/2014	2:30		Joe Admin	Red Dwarf > Project	6.62	EUR	0.00	<input checked="" type="checkbox"/>
	40.55		Postage	05/06/2014	23.89	Test FIX of req	Joe Admin	Red Dwarf > Project	968.73	EUR	0.00	<input checked="" type="checkbox"/>
	8.45		Postage	05/06/2014	0.43		Joe Admin	Red Dwarf > Project	3.63	EUR	0.00	<input checked="" type="checkbox"/>

Using quick filter "For Approval" you can display only invoices that need your attention. These invoices are still pending to be approve & sent to your clients.

## Print to Email

This function will take all Billing Settings and prepare new E-mail with 2 attachments: Invoice (or Draft Invoice) printed to PDF + Time Sheet attachment in case the Invoice is partially built using Time Sheet entries. You have option to send the invoice as Draft or you can approve & send the invoice immediately.

## Delete

You can delete any Draft invoice without any worry that you would get lost some of the entries. Billing entries (such as Billing Items or Time Sheet / Expenses) are not deleted. After deleting the Draft Invoice, you can press on button "Prepare Draft Invoices" and the invoice will be created again based on new Billing entries.

## Approve Draft

When approving the Draft Invoice, all Billing entries get locked and Draft Invoice will convert to regular Invoice & get Invoice Number. Invoice numbers are reused in case you delete some of the (unwanted) invoices.

## Postpone

The Draft Invoice in this case is deleted and all Billing entries change status to **Postponed**. Once you want to use Billing entries again, you'll need to filter for postponed Billing Items or Time Sheet records and change their status back to For Approval or Approved. In this case they'll be used to create new Draft Invoice.

## Avoid Billing

The Draft Invoice in this case is deleted and all Billing entries change status to **Avoid Billing** or **Canceled**. These Billing entries will not be used to generate another Draft Invoice.

# Time Sheet Approvals

When approving Draft Invoice, all Time Sheet entries that come with the Draft Invoice are approved immediately as well.

## Reject Time Sheet Entries

You can individually **Reject Time Sheet** entries from the Draft Invoice. Simply open the Draft Invoice approval window (or Draft Invoices tab on client's Folder), then select some of the Draft Invoices that have been created using Time Sheet entries. Select the Time Sheet entries you want to revise & click on Reject button bottom right to the Time Sheet records list.

The application will open **New notice** message, where you may want to write reason for refusing the Time Sheet entries. Users may find the Time Sheet entries by filtering their Time Sheet for status **Pending**.

atollon® Draft Invoice Approval

Joe Admin  
Your Organization

New Edit Use Template Prepare Draft Invoice Filter...

All 666,396.76 EUR  
For Approval 28,583.15 EUR  
This Month 7,486.33 EUR  
Previous Month 6,906.00 EUR  
Overdue 634,273.00 EUR

Number	Taxation Date	Due Date	Provider	Client	Total Amount	To be paid
	04/30/2014	06/27/2014	Best Provider	AAA AUTO a.s.	35.00 EUR	35.00 EUR
INV140020	03/31/2014	04/17/2014	Best Provider	Red Dwarf	176,564.00 CZK	6,409.00 EUR
	03/31/2014					600.00 EUR
	03/31/2014					0.00 EUR
	03/31/2014					870.00 EUR
INV140019	03/18/2014					888.00 EUR
INV140014	02/28/2014					870.00 EUR
INV140015	02/28/2014					12,000.00 EUR
	02/28/2014					7,172.00 EUR
	02/28/2014					1,888.00 EUR
	02/28/2014					6,000.00 EUR

Invoice States:  
All states  
Drafts  
Issued  
Paid  
Partially paid  
Disproval  
Demanded  
Cancelled

Total: 558,063.80 EUR Total with VAT: 667,596.76 EUR To be paid: 667,596.76 EUR

Time Sheets Billing Items

Export

Icon	Price	Invoice ...	Type o...	Dat
	2,500.00	INV140020	Consulting	03/11/2014
	2,500.00	INV140020	Project work	03/11/2014
	2,500.00	INV140020	Consulting	03/11/2014
	2,500.00	INV140020	Project work	03/11/2014
	120.00	INV140020	Consulting	03/11/2014
	2,500.00	INV140020	Project work	03/11/2014
	500.00	INV140020	Consulting	03/04/2014

Total records: 7 Total time: 48:00 Total quantity: 0 Total price: 68 400,00

Print to Email

MyriadPro 12 B I U

New Notice

Context: Red Dwarf Project

Message type: Notice

Recipients: Admin, Joe X Maka, Joe X

Subject: Your Time Sheet/Expenses were rejected.

Rejected Time Sheet/Expenses:  
admin; Project work; 03/13/2014 8:00 AM; 12:00; Chargeable;  
Conducting the project;  
admin; Consulting; 03/18/2014 8:00 AM; 2:00; Chargeable;  
Analysing client's needs;  
admin; Project work; 03/18/2014 8:00 AM; 2:00; Chargeable;  
New Task;

Use Template Cancel Save as draft and close Send

20,000.00 CZK 0.83  
1,000.00 EUR 0.20

Reject All

Delete Approve Draft Postpone Avoid Billing

Revision #1

Created 15 March 2020 06:28:00 by Jan Safka

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