

Setup invoice required fields

This features allows you delegate invoice creation to sales people

In case you want to delegate process of creating invoices down to sales people, there is an option.

Usually, during sales process, sales people need to focus on sales, not administration.

But, once the deal is closed an you want to collect cash, it is good idea to send proper invoice. That means, **the invoice should have all required fields filled-in.**

Now you can set-up fields that are going to be required when creating new invoice.

You can search for "Form" in Options & tools and find Form Settings screen, where you can configure what fields are required.

The screenshot shows the 'Issued Invoice' form in the Pioneer CRM Demo. The 'Form Settings' modal is open, displaying a table of fields to be configured. The 'Form Types' list on the left includes 'Contact form - company', 'Contact form - person', and 'Invoice Issued form'. The 'Form Settings' table has columns for 'Item', 'Visible', and 'Mand'. The 'period From' field is highlighted in blue. To the right of the table, there are checkboxes for 'Visible' and 'Mandatory', both of which are checked. An 'Apply' button is located at the bottom right of the modal.

Form Types	Form Settings	Item	Visible	Mand
Contact form - company	> Invoice Issued Settings	customer Contact Country	Yes	Yes
Contact form - person		customer Contact Reg Number	Yes	Yes
Invoice Issued form		customer Contact VAT Number	Yes	Yes
		send To Contact Email	Yes	Yes
		project Refid	Yes	Yes
		due Date	Yes	Yes
		issued By Contact Phone	Yes	Yes
		issued By Contact Email	Yes	Yes
		notes To Client	Yes	Yes
		notes To Us	Yes	Yes
		products	Yes	Yes
		period From	Yes	Yes
		period To	Yes	Yes
		product Unit Price	Yes	Yes
		product Units	Yes	Yes
		product Total Price	Yes	Yes
		product VAT	Yes	Yes
		Customer name	Yes	Yes
		Customer street	Yes	Yes
		Customer city	Yes	Yes
		customer Zip	Yes	Yes

Revision #4

Created 15 January 2020 09:10:11 by Jan Safka

Updated 15 March 2020 06:36:58 by Jan Safka