

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 includes fields for Number, External number, Journal, Currency, Payment method, Payment Reference, Id, Supplier, Customer, Comment, and Custom attributes. The 'Form Settings' modal is open, displaying a table of fields to be configured for the 'Invoice Issued form'.

| 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 |

On the right side of the modal, there are checkboxes for 'Visible' and 'Mandatory' for the selected field. The 'Apply' button is at the bottom right.

Revision #4

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

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