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Invoice Setting

Overview of Invoice Settings Tab

This tab contains various options for customizing your invoices. The page is split across two screenshots, so I will combine the details here.

Invoice Display and Behavior:

1. Invoice Logo

- **Purpose:** To display your company's logo on invoices.
- **How to Change:**
    - Click "Choose a file" or drag and drop an image file into the box to upload your company logo. The current logo is displayed.

2. Authorised Signatory Signature

- **Purpose:** To add a signature image of an authorized signatory to your invoices.
- **How to Change:** Click "Choose a file" or drag and drop an image file into the box to upload the signature image.

3. Language

- **Purpose:** Sets the language for the invoice content.
- **Current Setting (Example):** `English`
- **How to Change:** Click the dropdown menu and select the desired language for your invoices.

4. Due after*

- **Purpose:** Sets the default number of days after the invoice date that the payment is due. This is a mandatory field.
- **Current Setting (Example):** `15`
- **How to Change:** Enter the number of days in the provided field.

5. Send Reminder Before

- **Purpose:** Configures how many days before the due date an invoice reminder should be sent.
- **Current Setting (Example):** `0` Day(s)
- **How to Change:** Enter the number of days in the provided field.

6. Send Reminder After

- **Purpose:** Configures how many days after the due date an invoice reminder should be sent (for overdue invoices).
- **Current Setting (Example):** `0` Day(s)
- **How to Change:** Enter the number of days in the provided field.

Invoice Content Options (Checkboxes):

These checkboxes control specific information displayed on the invoice.

1. Show Tax number on invoice

- **Purpose:** If checked, your tax number will appear on the invoice.

2. Show Status

- **Purpose:** If checked, the payment status of the invoice (e.g., Paid, Unpaid, Partially Paid) will be displayed.
- **Current Setting:** Checked.

3. Hsn/Sac Code Show

- **Purpose:** If checked, HSN (Harmonized System of Nomenclature) or SAC (Services Accounting Code) codes will be displayed on the invoice (relevant for certain tax jurisdictions).

4. Show Authorised Signatory

- **Purpose:** If checked, the uploaded authorized signatory signature will appear on the invoice.

5. Show tax calculation message

- **Purpose:** If checked, a message related to tax calculation (e.g., "Taxes are included") will be displayed.

Client info to show on invoice (Checkboxes):

These checkboxes control which client contact details are displayed on the invoice.

1. Client Name

- **Purpose:** If checked, the client's name will appear on the invoice.
- **Current Setting:** Checked.

2. Company Name

- **Purpose:** If checked, the client's company name will appear on the invoice.
- **Current Setting:** Checked.

3. Client Email

- **Purpose:** If checked, the client's email address will appear on the invoice.
- **Current Setting:** Checked.

4. Client Address

- **Purpose:** If checked, the client's address will appear on the invoice.
- **Current Setting:** Checked.

5. Client Phone

- **Purpose:** If checked, the client's phone number will appear on the invoice.
- **Current Setting:** Checked.

6. Show Project on invoice

- **Purpose:** If checked, the associated project name will be displayed on the invoice.

Terms and Conditions:

- **Purpose:** A text area to include standard terms and conditions that will appear on all your invoices.
- **Current Content (Example):** `Thank you for your business.`
- **How to Edit:** Type your desired terms and conditions into this multi-line text field.

Other Information:

- **Purpose:** A free-text field for any additional information you wish to include on your invoices.
- **How to Edit:** Type your information into this multi-line text field.

Saving Your Changes

1. After making any modifications to the invoice settings, click the green "Save" button at the bottom of the page.
2. Your changes will be saved and applied to future invoices.

Invoice Template

Overview of Invoice Template Tab

This tab presents various pre-designed invoice templates for you to choose from.

1. Template*

- **Purpose:** To select the visual design and layout for your invoices. The selected template will be applied to all invoices generated in the system. This is a mandatory selection.
- **How to Choose:**
  - Browse through the available template previews displayed on the page.
  - Click on the template you wish to use. The currently selected template will be highlighted with a blue border (as seen with the last template in the image).

Saving Your Changes

1. After selecting your preferred invoice template, click the green "Save" button at the bottom of the page.
2. Your changes will be saved, and all future invoices will be generated using the newly selected template.

Prefix Settings

Overview of Prefix Settings Tab

This tab allows you to customize the prefix, separator, and number of digits for the sequential numbering of different document types. Each section follows a similar pattern:

- **[Document Type] Prefix***: The short code or text that comes before the number. This is a mandatory field.
- **[Document Type] Number Separator**: The character that separates the prefix from the sequential number.
- **[Document Type] Number Digits**: The minimum number of digits for the sequential number (e.g., 3 means 001, 002, etc.).
- **[Document Type] Number Example**: A preview of how the number will appear based on your settings.

Here are the specific document types you can configure:

1. Invoice Numbering

- **Invoice Prefix***:
  - **Purpose:** Sets the prefix for your invoice numbers.
  - **Current Setting (Example):** `INV`
  - **How to Change:** Enter your desired prefix.
- **Invoice Number Separator**:
  - **Purpose:** Sets the character between the prefix and the invoice number.
  - **Current Setting (Example):** `#`
  - **How to Change:** Enter your desired separator.
- **Invoice Number Digits**:
  - **Purpose:** Sets the number of digits for the sequential part of the invoice number.
  - **Current Setting (Example):** `3`
  - **How to Change:** Enter the desired number of digits.
- **Invoice Number Example**: Shows a live preview (e.g., `INV#001`).

2. Credit Note Numbering

- **Credit Note Prefix***:
  - **Current Setting (Example):** `CN`
  - **How to Change:** Enter your desired prefix.
- **Credit Note Number Separator**:
  - **Current Setting (Example):** `#`

    - **How to Change:** Enter your desired separator.
- **Credit Note Number Digits**:
    - **Current Setting (Example):** `3`
    - **How to Change:** Enter the desired number of digits.
- **Credit Note Number Example**: Shows a live preview (e.g., `CN#001`).

3. Estimate Numbering

- **Estimate Prefix***:
    - **Current Setting (Example):** `EST`
    - **How to Change:** Enter your desired prefix.
- **Estimate Number Separator**:
    - **Current Setting (Example):** `#`
    - **How to Change:** Enter your desired separator.
- **Estimate Number Digits**:
    - **Current Setting (Example):** `3`
    - **How to Change:** Enter the desired number of digits.
- **Estimate Number Example**: Shows a live preview (e.g., `EST#001`).

4. Estimate Request Numbering

- **Estimate Request Prefix***:
    - **Current Setting (Example):** `ESTRQ`
    - **How to Change:** Enter your desired prefix.
- **Estimate Request Number Separator**:
    - **Current Setting (Example):** `#`
    - **How to Change:** Enter your desired separator.
- **Estimate Request Number Digits**:
    - **Current Setting (Example):** `3`
    - **How to Change:** Enter the desired number of digits.
- **Estimate Request Number Example**: Shows a live preview (e.g., `ESTRQ#001`).

5. Order Numbering

- **Order Prefix***:
    - **Current Setting (Example):** `ODR`
    - **How to Change:** Enter your desired prefix.
- **Order Number Separator**:
    - **Current Setting (Example):** `#`
    - **How to Change:** Enter your desired separator.
- **Order Number Digits**:
    - **Current Setting (Example):** `3`
    - **How to Change:** Enter the desired number of digits.
- **Order Number Example**: Shows a live preview (e.g., `ODR#001`).

6. Proposal Numbering

- **Proposal Prefix***:
  - **Current Setting (Example):** `Proposal`
  - **How to Change:** Enter your desired prefix.
- **Proposal Number Separator**:
  - **Current Setting (Example):** `#`
  - **How to Change:** Enter your desired separator.
- **Proposal Number Digits**:
  - **Current Setting (Example):** `3`
  - **How to Change:** Enter the desired number of digits.
- **Proposal Number Example**: Shows a live preview (e.g., `Proposal#001`).

Saving Your Changes

1. After making any modifications to the prefix settings, click the green "Save" button at the bottom of the page.
2. Your changes will be saved and applied to new documents generated in the system.

Units

Overview of "Add Unit Type" Fields

The modal contains one mandatory field to define the new unit type.

1. Unit Type*

- **Purpose:** To define a new unit of measurement (e.g., "Hour", "Kilogram", "Piece", "Liter", "Galon" as seen in the background).
- **Example:** `Enter a category name`
- **How to Fill:** Type the name of the unit type into this text field.

Actions within the Modal

- **Close (X icon):** Click the 'x' icon in the top right corner of the modal window to close it without saving.
- **Close:** Click the "Close" button to close the modal window without saving the new unit type.
- **Save:** Click the green "Save" button to add the new unit type to your system. If the mandatory "Unit Type" field is left blank, you will receive an error message.

Quickbooks Settings

Overview of Quickbooks Settings Tab

This tab provides the option to enable or disable the Quickbooks integration.

Important Note: At the top of the page, there is a crucial message: "*It is only One-Way Sync. If you create an invoice or payment here then an invoice or payment will be created on Quickbooks too.*" This means that data flows *from* this application *to* Quickbooks, but not the other way around.

1. Status

- **Purpose:** This checkbox controls whether the integration with Quickbooks is active or inactive.
- **How to Use:**
  - **Check the box:** To enable the one-way synchronization with Quickbooks. When checked, you would typically see additional fields appear (e.g., fields for Quickbooks API keys, client ID, client secret, or a "Connect to Quickbooks" button) where you authorize the connection between this application and your Quickbooks account. These fields are not visible in the provided screenshot but are essential for a functional setup.
  - **Uncheck the box:** To disable the Quickbooks integration.

Saving Your Changes

1. After making any changes to the status or configuring the Quickbooks credentials (if applicable), click the green "Save" button at the bottom of the section.
2. Your changes will be saved, and the Quickbooks integration status will be updated accordingly.

Invoice Payment Details

Overview of "Add Payment Detail" Fields

The modal contains two fields for defining the payment detail. Fields marked with a red asterisk (*) are mandatory.

1. Title*

- **Purpose:** A short, descriptive title for the payment method you are adding (e.g., "Bank Transfer," "Credit Card," "PayPal").
- **Example:** `Payment Description` (This is likely a placeholder for what should be a more specific title).
- **How to Fill:** Type a clear and concise title for the payment detail into this text field.

2. Payment Details

- **Purpose:** A detailed description of the payment method, including all necessary information for a client to make a payment.
- **Guidance:** `Add Payment Method Details (e.g., Bank Account, Transfer Information)`
- **How to Fill:** Type all relevant payment information into this multi-line text field. Examples include:
  - Bank Name, Account Number, SWIFT/IBAN code for bank transfers.
  - Instructions for paying via specific online methods.
  - Any other specific instructions for the client.

Actions within the Modal

- **Close (X icon):** Click the 'x' icon in the top right corner of the modal window to close it without saving.
- **Close:** Click the "Close" button to close the modal window without saving the new payment detail.
- **Save:** Click the green "Save" button to add the new payment detail to your system. If the mandatory "Title" field is left blank, you will receive an error message.