Account Invoices Screen

Invoicing & Credit Notes · https://learn.logisense.com/docs/567476570/

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Account Invoices are viewed in Account / Billing / Invoices

Overview

The Invoices screen is used to review invoices that have been generated for the account. From this screen you can review invoice dates, delivery-related settings, invoice transactions, invoice taxes, invoice history, and supported invoice actions such as view, re-render, deliver, and void.

The screen is primarily a review and operational management area. Some invoice values, such as **Invoice Date**, **Due Date**, and **Do Not Deliver**, can be updated when the invoice state allows it. Other values, such as the invoice detail shown for voided invoices, are informational and are displayed based on the selected invoice.

Invoice Statuses

The status of an invoice changes throughout the billing process to track invoice progress. Common statuses shown on invoices include:

- **Open**
- **Pending Tax**
- **Tax In Progress**
- **Taxed**
- **Posted**
- **Render Pending**
- **Render In Progress**
- **Render Failed**

- **Rendered**
- **Delivered**
- **Void Pending**
- **Void In Progress**
- **Void**

The Invoices Panel

The Invoices panel on the left lists the invoices that exist on the account. Select an invoice in this panel to review its details on the right.

Actions

Icon	Description
	Delivers the selected invoice when delivery is available and valid for the invoice state.
	Starts the re-render process for a rendered invoice or an invoice whose previous re-render failed.
	Opens the rendered invoice for viewing when a rendered document is available.
	Voids the selected invoice when the invoice is eligible to be voided.

Invoices List

The invoice list shows summary details for each invoice, such as invoice number, invoice status, dates, and total values.

The Edit Invoice Panel

The panel on the right displays the details for the selected invoice.

Fields

- **Invoice Date**: The invoice date.

- **Due Date**: The due date for the invoice.
- **Do Not Deliver**: Prevents delivery of the invoice when selected. This option is only editable when the invoice state still allows delivery settings to be changed.
- **Email Delivery Skipped**: A read-only indicator showing that email delivery was skipped for the invoice.
- **Detail**: A read-only detail field shown for voided or voiding invoices to identify the related invoice relationship, such as the voiding invoice or the invoice that is being voided.

Transactions Tab

The **Transactions** tab lists the transactions that have been applied to the selected invoice. The list includes transaction details such as service context, quantity, amount, tax total, and billing-period details where available.

If a transaction includes tax, the tax detail for that transaction can be opened from this tab. Selecting a transaction also allows you to navigate to that transaction on the Transactions screen.

Taxes Tab

The **Taxes** tab lists the tax summary entries that have been applied to the invoice.

Each row shows values such as:

- tax name
- tax code
- tax rate
- tax amount
- amount reportable

History Tab

The **History** tab lists invoice activity recorded for the selected invoice. This includes actions such as creation, taxation, rendering, delivery, and voiding, together with the date and user associated with each event.

Guides

Re-Rendering An Invoice

Use re-rendering when invoice output needs to be generated again, for example after invoice-template or report-output changes.

1. In the **Invoices** panel, select the invoice you want to re-render.
2. Click **Re-Render**.
3. In the confirmation dialog, review **Generate New Reports**.
4. Leave **Generate New Reports** enabled when the attached report outputs should be regenerated along with the invoice render.
5. Clear **Generate New Reports** when you only need the invoice document to be rendered again and do not want new report versions generated.
6. Confirm the re-render request.

Delivering An Invoice

1. In the **Invoices** panel, select the invoice you want to deliver.
2. Click **Deliver**.
3. Confirm the delivery request.

Viewing An Invoice

1. In the **Invoices** panel, select the invoice you want to view.
2. Click **View**.
3. Review the rendered invoice document.

Voiding An Invoice

1. In the **Invoices** panel, select the invoice you want to void.
2. Click **Void**.
3. Confirm the void request.
4. Review the resulting invoice state and the related voiding or voided invoice details.