Automatic Naming Example

Invoicing Examples · https://learn.logisense.com/docs/694026376/

Summary

Automatic naming settings allow you to configure custom invoice and credit note naming/numbering schemes.

Automatic naming schemes are useful when migrating from another billing system. Invoice numbers and/or credit note numbers can be setup to resume from the last invoice number or credit note number issued in the previous billing system.

This configuration example will demonstrate how to setup both an invoice and a credit note numbering scheme that contains a prefix and starts at a value greater than zero (e.g. resuming an invoice numbering scheme from another system).

For additional details on the fields presented on this screen see the Owner Configuration Screen screen help guide.

Prerequisites

- Automatic naming can be setup immediately, there are no prerequisite configuration steps

Sample Configuration

1. Log into the LogiSense Billing application
2. Click on the **Setup** menu, **Users & Accounts** and then **Owners**
3. On the owner screen that loads click on the **Automatic Naming** tab on the left
4. Check off the **Invoice Numbering** and **Credit Note Numbering** options to enable custom numbering schemes. An example you can configure invoices with a prefixed of ‘INV-’ and start at 7854 with a six character numerical length (the length will add leading zeros to the invoice

number). This configuration will result in the first invoice generated on an account being prefixed and numbered as ‘INV-007854’

5. Click **Save** to commit your numbering scheme changes

Next Steps

- **Owner Configuration Optional Steps**:
  - **Optional**: if you need to translate product names on invoices you can configure translations on locales now or at a later time. See the Locales Configuration Example for a sample configuration
  - **Optional**: if you wish to define custom payment types you can do so now or at a later date. See the Payment Types Configuration Example for instructions on how to add a payment type
  - **Optional**: if you need to integrate the LogiSense Billing application with an external payment gateway you can do so now or at a later time. See the Payment Gateway Example for instructions on how to configure a gateway

- **Email Settings Optional Steps**:
  - **Optional**: Email settings allow the system to send emails. New users cannot be emailed with a link to setup their passwords until email settings are configured. This step does not need to be completed until you are ready to setup new users. See the Email Settings Configuration Example for instructions on how to setup and test email Settings

- **Users and Roles Optional Steps**:
  - **Optional**: Users and roles define who can access the system and what they can access. See the Role Group Configuration Example article as a starting point for setting up users and roles

- **Account Settings Required Steps**:
  - Account types, statuses and contacts need to be configured before proceeding to other required steps. See the Account Types Configuration Example article to start setting up the required account settings