4.23 Invoices

**Understanding the Basics:**

Invoices are very flexible, one of the 12 main players and one of the most used pieces in the adilas system. Invoices are the means to track products or services you are selling. It contains a record of the goods you sold and the amount owed to you for your products or services. A great deal of information is held on an invoice, such as: COGS, payments, revenue, items sold, customer information, etc.

Invoices feed the P&L (Profit & Loss) as well as inventory levels on the balance sheet, they effect inventory counts and create your accounts receivable. Whether money is fully collected, partially paid or still owed, this is mapped to your financials in adilas. There are 6 invoice types that can be used in adilas: quote, counter sale, customer invoice, internal repair, transfer, and transition invoice.

Invoices are created in the shopping cart - this is the interface to build an invoice. While in the shopping cart you are in a construction phase until you proceed to “checkout” when it then becomes an actual invoice in the system. To create an invoice from the homepage click “Start New Cart”, or from the Invoice Homepage “Create New Cart”.

**Getting Started:**

**Suggested Permission & Settings:**

**Permissions:**

**Basic Use:**

System Search: “Invoice”

System Basics: “Start New Cart (Invoice)”

“My Cart Favorites”

“My Quotes”

System Reports: “Parts/Inventory”

System Assets: “Basic Quotes”

“Basic Invoices”

**Admin Use:**

System Reports: “Parts Admin”

System Assets: “Admin Invoices”

**Related Pages & Help File Links:**

Start New Shopping Cart (Invoice):

<https://www.adilas.biz/top_secret/help.cfm?id=144&pwd=cart>

\*\*\*View Cart Help File: Great help file if you are spending any amount of time creating invoices. This will help you with things you need to know about the shopping cart. This will teach you about how to get things in and out of your cart, this is where you can learn about the other invoice types, how to deal with aspects contained in invoices, cart logic, saving your carts, big ticket items, applying discounts, and much more. You want to take the time to check this file out! \*\*\*

<https://www.adilas.biz/top_secret/help.cfm?id=143&pwd=cart>

Add Item to Cart:

<https://www.adilas.biz/top_secret/help.cfm?id=146&pwd=cart>

Invoice Homepage:

<https://www.adilas.biz/top_secret/help.cfm?id=147&pwd=invoice>

Printable Invoice: (after it is now an invoice in the system)

<https://www.adilas.biz/top_secret/help.cfm?id=149&pwd=print>

Add/Edit Invoice Line Items & Invoice Payments: (again, after you have an invoice in the system)

<https://www.adilas.biz/top_secret/help.cfm?id=155&pwd=line>

**Additional Content:**

-Graphics

-Screen shots

-Etc.