

Invoicing

- [Troubleshooting](#)
- [Cancel an issued invoice](#)
- [Create an issued invoice for merch order](#)

Troubleshooting

Voucher bank transaction not found on issued invoice

- Go to sales order for this invoice and find bank transaction
- Rename voucher to something meaningful (e.g. Voucher payment - Jure Jager)
- Find this transaction on invoice by new name

Cancel an issued invoice

If invoice has already been issued and sent to customer, you need to issue a new credit note. You should not modify already sent invoices!

1. Open the problematic **issued invoice** and remove all of its **items**.
2. Update the **shipping** and **financing** costs to **zero**.
3. Change status of the **issued invoice** to **canceled**.
4. Change invoice's **delivery note** status to **canceled**.
5. Delete **shipping list**:

The screenshot shows a table of shipping lists. A red arrow labeled '1.' points to the search bar containing 'SL-01057-2024'. A red arrow labeled '2.' points to the 'SL-01057-2024' entry in the 'DOCUMENT NO.' column. A red arrow labeled '3.' points to the trash icon in the top right action bar.

DOCUMENT NO.	ORDER #	ORDER #	NUMBER OF PACKAGES	NET WEIGHT	GROSS WEIGHT	CREATED AT
SL-01057-2024	02136-2022	02136-2022	9	131.73	166.6	Mar 15, 2024

6. Delete **packing list** (flow is the same as for deleting shipping list)
7. Go to the **Packing work order** and open it's **material flow**.
8. Find all of the write-off documents:

The screenshot shows a table with material flow data. The first row contains a red arrow pointing left with the number '204', the text 'GWO-007382-2024', and 'KRYPTONI-16xTH (PIN.2010124.000)'.

← 204	GWO-007382-2024	KRYPTONI-16xTH (PIN.2010124.000)
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9. Open each write-off and cancel it (this will remove write-off transactions from database):

← GWO-007382-2024

— Basic information

ORDER #

PARTNER

Select partner company

GOODS RECEIPT

MOVEMENT TYPE

Goods writeoff sale

BOOKING DATE

15. 03 . 2024

x



STATUS

BOOKED

+ Error information

— Items

ID

PRODUCT

INVOICE

WAREHOUSE

3809787

PIN.2010124.000: KRYPTONI-16xTH

Goods in transit - 01

+ File manager

0

+ Comments

0

— Danger zone

Cancel

+ Activity timeline

Are you sure?

If already made, transactions will be deleted!

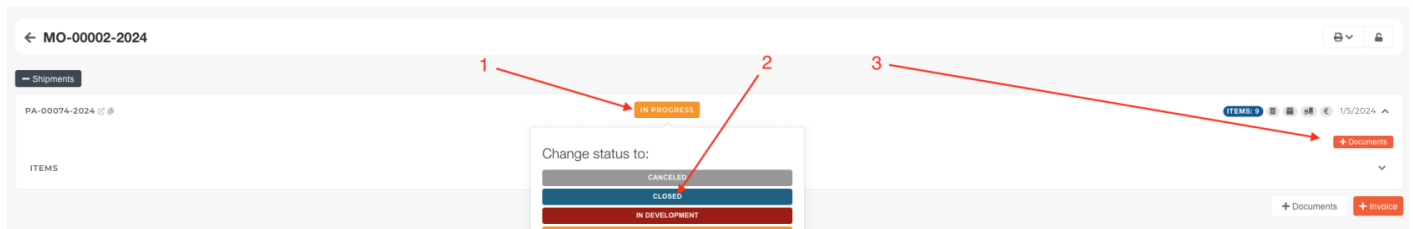
Confirm

Cancel

10. Material is now back on packing work order. Do with it what is necessary.

Create an issued invoice for merch order

1. Open the **merch order** and check the partner and set it as "**checked**"
2. Copy partner's address onto the merch order (with the buttons)
3. Change the packing order status to "**closed**" and click the in "+ **Documents**" button for document generation:



4. Select the packing list and press the "**create**" button on the modal form that appears.



Check documents and order items for which you wish to create documents.



Delivery note



Packing list



Shipping list

Gal Ograjenšek

PARTNER



DOCUMENT NO.

PRODUCTS

PA-00074-2024

IN PROGRESS



- 2x RPR.0000025.000: DEWESOFT-WINTER-HAT
- 1x RPR.0000880.000: DS-POWERBANK-2023
- 2x RCT.0001753.000: T-SHIRT-MENS-L
- 1x RCT.0001763.000: LONG-SLEEVE-TEE-BLACK-MAN-L
- 1x RCO.0000004.000: USB-KEY-KRYPTON-3.0-16GB
- 1x RPR.0000882.000: DS-2023-NOTEPAD
- 2x RPR.0000008.000: DEWESOFT-STICKY-NOTES
- 1x RCT.0001754.000: T-SHIRT-MENS-XL
- 1x RCT.0001760.000: T-SHIRT-WOMENS-L

Create

5. Next, press the **"Move to transit"** button.

ITEMS: 9

OK



1/5/2024



Move to transit warehouse location?

Move to transit

Move to transit and notify accounting

Cancel

+ Documents



6. After that, create a new invoice for that packing list.

ITEMS: 9

OK

€

1/5/2024

+ Documents

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1/25/2024

PREPAYMENTS

Nothing found

PARTNER

Gal Ograjenšek

INVOICE DATE

25. 01 . 2024

PAYMENT DATE

24. 02 . 2024

EXPORT DECLARATION

NO

SALES TYPE

Dobava blaga in storitev

MRN TRACKING

CLAUSE

RENTAL INVOICE

NO

Items with stock tracking must be handled via shipments.

Create

7. Once create, go to that invoice and select bank transactions that correspond to the invoice. Input customer's first and last name and select "Card payment" and "Voucher Payment". These will together make up the amount of the invoice and the invoice will be automatically closed.

Bank transactions

NAME	INCOME AMOUNT	BANK COMMISSION	CURRENCY RATE	TRANSACTION SOURCE
No data for table				

+ Add new

+ Compensations

or choose existing:

BANK TRANSACTIONS

Gal Ograjenšek, 52.22, STRIPE NAKAZILO

Gal Ograjenšek, 100, Voucher payment

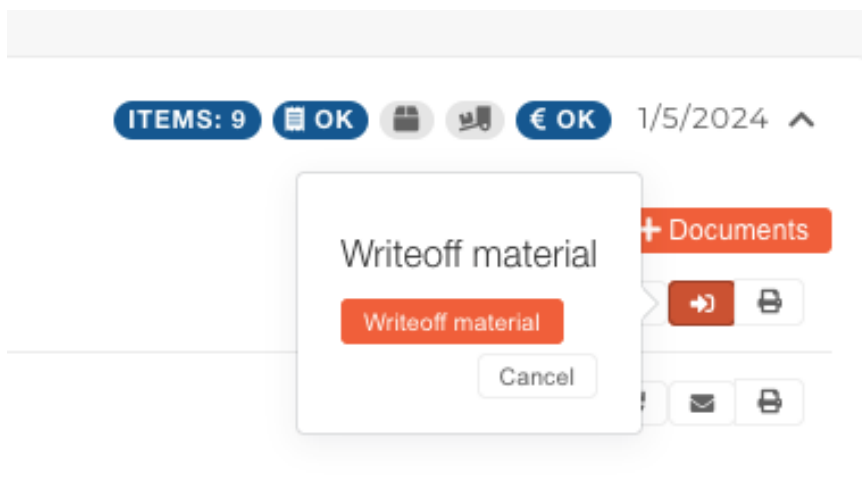
Gal Ograjenšek, 53.11, Card payment

8. In the "**Bank transactions**" section, transaction source of the **voucher payment** must be set to "**Voucher**" and for **Card payment** the transaction source must be set to **prepayment** (this has to be done to ensure the invoice is properly structured).

Bank transactions				
NAME	INCOME AMOUNT	BANK COMMISSION	CURRENCY RATE	TRANSACTION SOURCE
Voucher payment	€100.00	€0.00	1	Voucher
Card payment	€53.11	€0.00	1	Prepayment

Shipping and packaging	EUR	0,00
TOTAL	EUR	125,50
VAT 22.0 %	EUR	27,61
Invoice total	EUR	153,11
Net prepayment amount	EUR	81,97
VAT prepayment	EUR	18,03
Total prepayment received on 02. 01. 2024	EUR	100,00
Net prepayment amount	EUR	43,53
VAT prepayment	EUR	9,58
Total prepayment received on 02. 01. 2024	EUR	53,11
REMAINS FOR PAYMENT	EUR	0,00

9. After that, return to the merch order, write off the material and send the invoice to the customer's email.



10. After the invoice was sent, update the status of order to **"shipped"**.