Customer invoicing: common elements

Fix Me! A1 proofreading not yet effective for this page. In the meantime, you can ask any questions on the forum.

Customer invoicing includes the following parts:

- **customer quotes**
- **customer orders**
- **customer invoices**
- **customer credits**
- the **delivery notes**

Some elements are common to billing In general, this page describes the common elements of client-side billing.

Workflow

The customer billing workflow can have the following form:

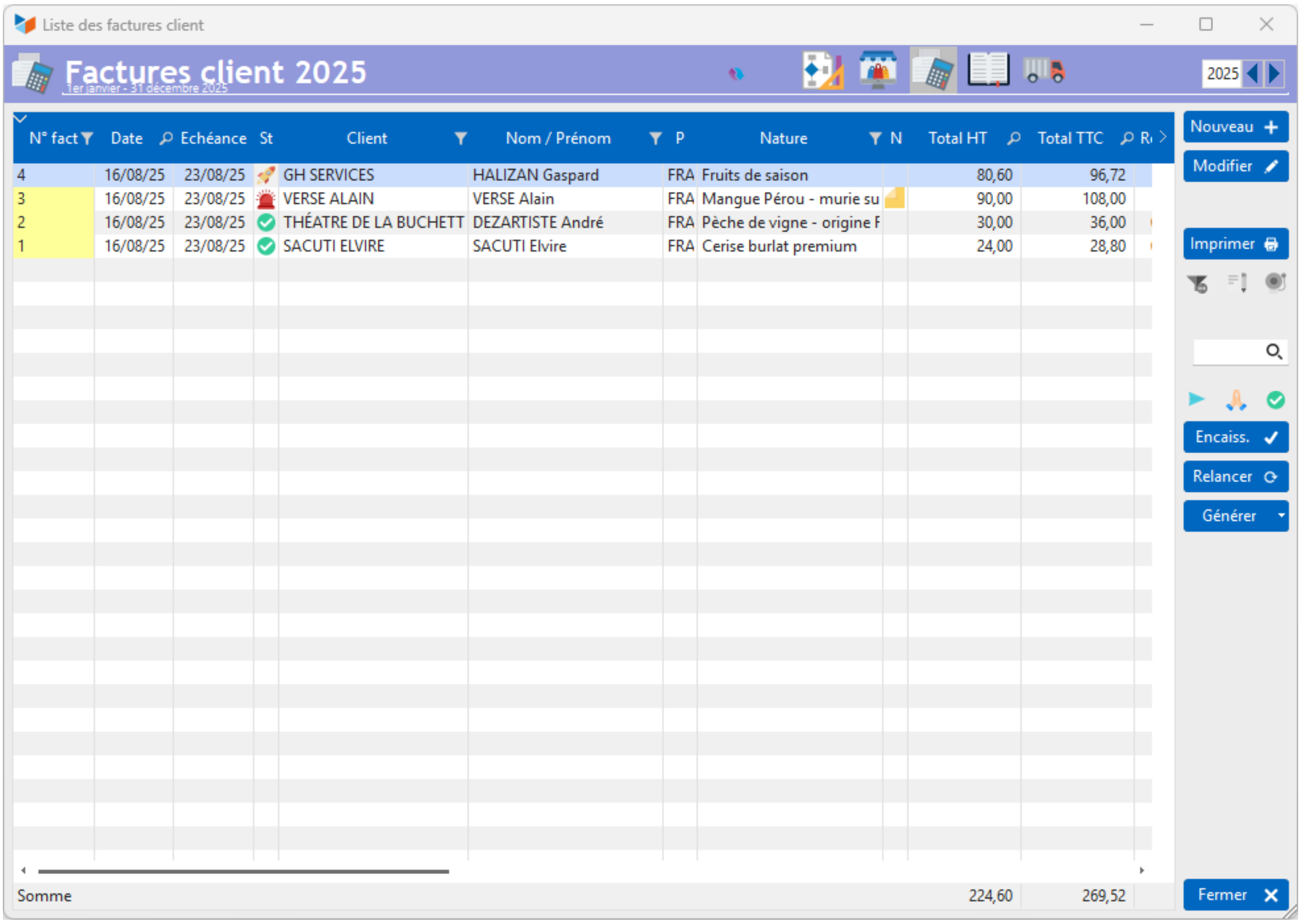
1. you issue a quote
2. your customer returns it to you signed
3. you issue a supplier order based on the quote, to order the necessary supplies
4. you generate an order from the quote and start manufacturing
5. you can, from the sales order, generate a supplier price request, and/or a supplier order
6. you can also, from the sales order, directly generate a BL
7. you generate an invoice from the order
8. you can generate a credit note from the invoice
9. you send the product by materializing it by issuing a BL generated from the invoice
10. you could also generate a customer invoice from the BL.

None of these steps is mandatory, the flexibility of this workflow allows it to adapt to your company's practices.

It is possible to define access rights to each file for each user, and to provide mandatory validation of documents issued by certain users by other users. A maximum discount rate can also be defined per user.

Parts List

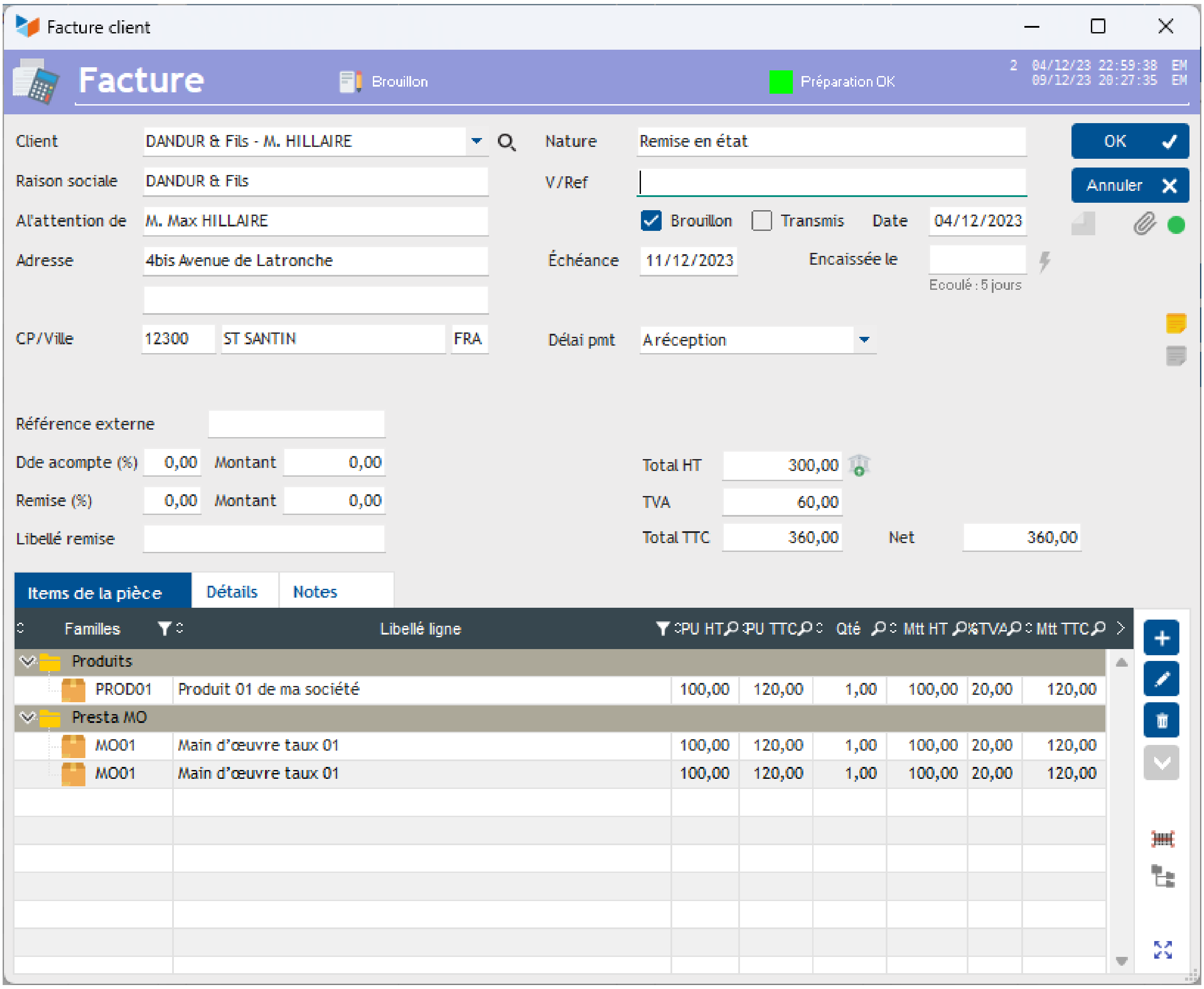
Below is the list of invoices, for example.



The operation of this table screen is described in the elements common to invoicing page.

Part sheet

Below is an example of a customer invoice.



How this screen works is described in the elements common to invoicing page.

When entering a customer document line, the VAT rate is entered with the VAT rate entered at the product level. If it is not entered, or if you do not use a product catalog, it is automatically populated with the VAT rate defined as the default VAT. But it is still possible to modify it line by line. If the customer benefits from a personal VAT rate, or from a tax regime having repercussions on the VAT rate, the customer rate will apply.

Other Customer Billing articles

Billing: common elements

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