

☰ View Invoice Request   ➤ FlowChart   🗨 Notes   📁 Files 1   🕒 History   🕒 History diagram   ⚙ All

Invoice Details			
<b>Customer*</b>	Customer C	<b>Send Invoice To*</b>	<a href="mailto:customer@example.com">customer@example.com</a>
<b>Address On Invoice*</b>	Example Street, Example City, AA 12345	<b>Currency*</b>	USD \$
<b>Purchase Order</b>	<a href="#">Purchase Order 0004.pdf</a>	<b>No. Line Items</b>	2

Please complete the invoice details below. When the invoice is ready to be sent, please change the status to Pending Invoice. A notification will be sent to the Finance Team, who will raise the invoice and then set the status to Invoice Sent.

Line Items					
<b>Nominal Code*</b>	1210 - Product B	<b>Amount*</b>	1050	<b>Description*</b>	Lorem ipsum dolor sit amet

Once the status has been set to Invoice Sent, a new section will become available, allowing the Finance Team to log the invoice details.

## Invoice Request

### Download

#### Overview

When there are multiple people in an organisation instructing invoices to be sent to customers, it's helpful to have a centralised billing system. This form allows users to submit invoice details and control when the finance team should raise the invoice. Invoices may contain up to 5 line items, each with a separate nominal code, amount and description. When the status is changed to Pending Invoice, the finance team will receive a notification, letting them know there is an invoice that needs to be raised. When the invoice has been sent, the finance team can set the status to Invoice Sent and attach the relevant invoice. This means that users can find historic invoice information, even if the finance team aren't around.

#### Additional features

**Show & Hide field permissions:** Select a number of line items, a Field Condition Set has been setup for each number on the list. Subsequently, field permissions have been set on each line to show or hide depending on which number has been picked from this list.

☑ No. Line Items = 1-5	No. Line Items IN (1, 2, 3, 4, 5)
☑ No. Line Items = 2-5	No. Line Items IN (2, 3, 4, 5)
☑ No. Line Items = 3-5	No. Line Items IN (3, 4, 5)
☑ No. Line Items = 4-5	No. Line Items IN (4, 5)
☑ No. Line Items = 5	No. Line Items IN (5)
☑ Add Discount = Yes	Add Discount == '1'

Some of the field condition sets seen in the project, which are used to control the field permissions that show and hide form fields

Last modified on 2 June 2020 by Kerensa Johnson

Created on 28 January 2018 by Jon Mulhern

Tags: form templates, infocapture