Invoice Request

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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

Dynamic fields: Select a number of line items, a Field Condition Set has been set up 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.

⊞ Line Item 2												
	All		Users		Finance		Admin		Submitter of ticket		Ticket handler	
Field condition set	View	Edit	View	Edit	View	Edit	View	Edit	View	Edit	View	Edit
═ Default (Always)	Mixed	Mixed	Deny	Deny	Deny	Deny	Deny	Deny	Not set	Not set	Not set	Not set	🗑
═ No. Line Items = 2-5	Mixed	Mixed	Allow	Allow	Allow	Allow	Allow	Allow	Not set	Not set	Not set	Not set	🗑
＋ Add Condition Set												

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

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