

Job Invoice Setup

Introduction

This guide helps you to configure default invoice templates, default invoice by (job company bank account), and default invoice edit mode for invoices in your organization.

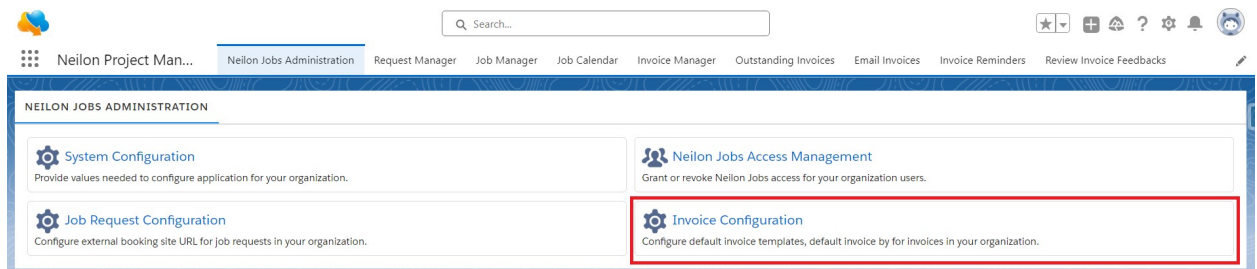
Below are the settings you can configure for the job invoices in **Invoice Configuration**.

- Default Invoice By
- Invoice Edit Mode
- Default End of Month Invoice Template
- Default Prepaid Invoice Template

Set Default Invoice By

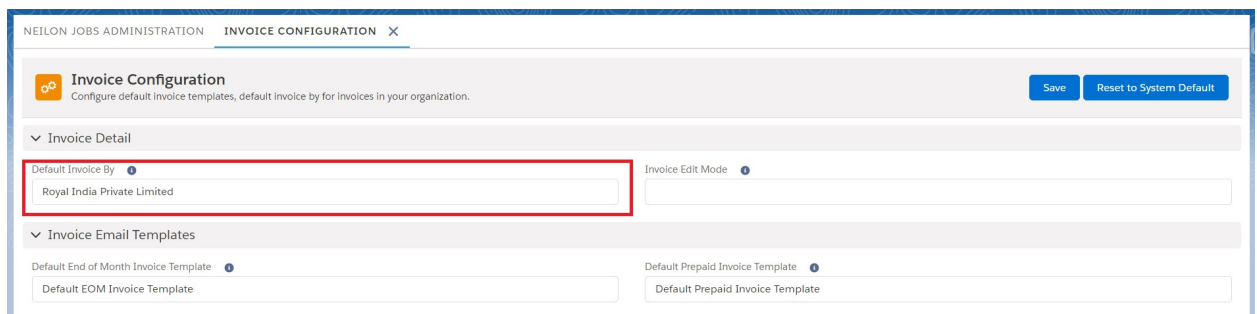
A job company bank account name set in the **Default Invoice By** will be auto-populated in the **Invoice By** field of the invoice while creating a new invoice. Follow the below steps to set the **Default Invoice By**.

1. Navigate to the **Neilon Project Management** application from the App Launcher.
2. Go to the **Neilon Jobs Administration** tab.
3. Click on **Invoice Configuration**.



4. Put the job company bank account name in the **Default Invoice By** field which you want to use as as default job company bank account for the invoice while creating a new invoice.

Note: If you have not created the job company bank account, then create it by following the **Neilon Project Management Invoice Company Bank Accounts Setup** guide.



5. Click on the **Save** button to save the configuration.

Set Invoice Edit Mode

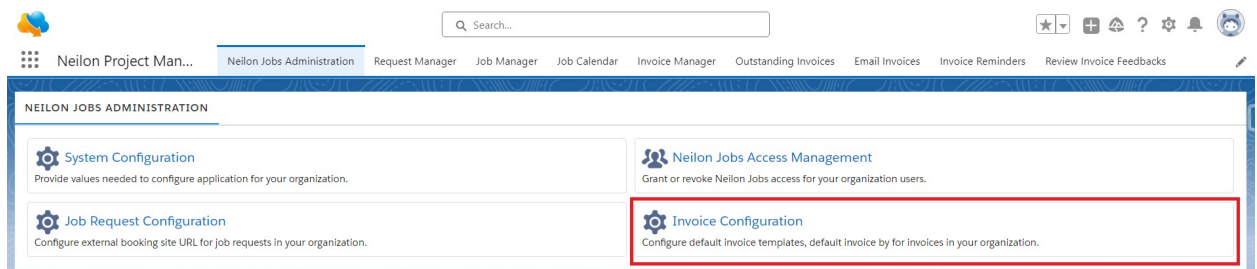
Set the **Invoice Edit Mode** as per your requirement. **Invoice Edit Mode** will be used to decide which edit mode you want to open when the user edits the invoice from the invoice record details page using the standard invoice edit action.

There are two invoice edit modes you can set.

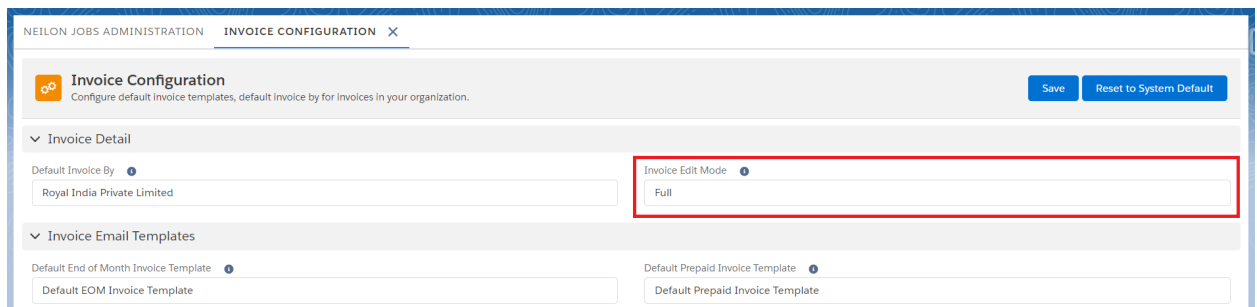
- **Full** - If you want to edit full invoice details with invoice line items in a custom Neilon component.
- **Details Only** - If you want to edit invoice details only in standard edit mode.
- Empty or Blank value - If you want to use both options and decide the edit mode after clicking edit action, then leave this field value as empty or blank.

Follow the below steps to set the **Invoice Edit Mode**.

1. Navigate to the **Neilon Project Management** application from the App Launcher.
2. Go to the **Neilon Jobs Administration** tab. Click on **Invoice Configuration**.



3. Set **“Full”** in the invoice edit mode and click on the **Save** button to save the configuration.



Now, when you edit the invoice from its record detail page standard edit action, It will show the invoice edit custom component in which you can edit all invoice fields and add or update invoice line items as well.

Edit

Details

Payee

Snapdeal Fashion Pvt Ltd

* Issue Date

12-Apr-2024

Invoice Number

0000124

* Due Date

12-May-2024

Invoice#

INV-NEILON-2024-0000124

VAT Percentage

Invoice Recipient

Ajinkya Pathak

* Invoice By

Royal India Private Limited

Currency

USD

Payee Detail

Contact Name

Address

Cancel

Skip and Save

Next

4. Set “**Details Only**” in the invoice edit mode and click on the **Save** button to save the configuration.

NEILON JOBS ADMINISTRATION

INVOICE CONFIGURATION

Invoice Configuration

Configure default invoice templates, default invoice by for invoices in your organization.

Save

Reset to System Default

Invoice Detail

Default Invoice By

Royal India Private Limited

Invoice Edit Mode

Details Only

Invoice Email Templates

Default End of Month Invoice Template

Default EOM Invoice Template

Default Prepaid Invoice Template

Default Prepaid Invoice Template

Now, when you edit the invoice from its record detail page standard edit action, It will show the

standard invoice edit form in which you can edit invoice details only.

Edit

Job Invoice Number

INV-NEILON-2024-0000124

Invoice#

INV-NEILON-2024-0000124

Invoice Number

0000124

Payee

Snapdeal Fashion Pvt Ltd

* Issue Date

12-Apr-2024

Invoice Recipient

Ajinkya Pathak

* Invoiced By

Royal India Private Limited

Invoice Type

Pre-paid

Currency

USD

VAT Percentage

VAT Amount

0.00

Total

40,000.00

Payment Date

Payment Reference

Close

- Set “ ” blank or empty value in the invoice edit mode and click on the **Save** button to save the configuration.

NEILON JOBS ADMINISTRATION

INVOICE CONFIGURATION

Invoice Configuration

Configure default Invoice templates, default invoice by for invoices in your organization.

Save

Reset to System Default

Invoice Detail

Default Invoice By

Royal India Private Limited

Invoice Edit Mode

Invoice Email Templates

Default End of Month Invoice Template

Default EOM Invoice Template

Default Prepaid Invoice Template

Default Prepaid Invoice Template

Now, when you edit the invoice from its record detail page standard edit action, It will show both options and you can decide the edit mode.

Edit

You are editing invoice INV-NEILON-2024-0000124. Click the below buttons to edit the invoice:

- **Edit Invoice Details** : Edit invoice details only in standard edit mode.
- **Edit Full Invoice Details** : Edit full invoice details with invoice line items in a custom component.

Edit Invoice DetailsEdit Full Invoice DetailsCancel

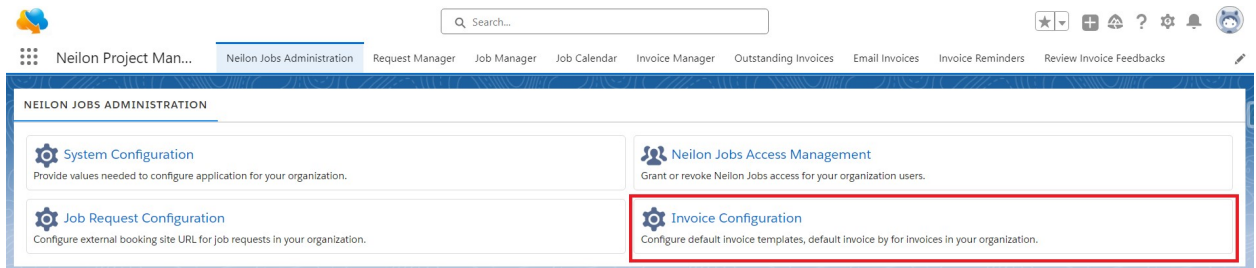
- Click on **Edit Invoice Details**, it will show the standard invoice edit form in which you can edit invoice details only.
- Click on **Edit Full Invoice Details**, it will show the invoice edit custom component in which you can edit all invoice fields and add or update invoice line items as well.

Set Default End of Month Invoice Template

The invoice email template will be used while sending invoices to the payee.

Follow the below steps to set the **Default End of Month Invoice Template**.

1. Navigate to the **Neilon Project Management** application from the App Launcher.
2. Go to the **Neilon Jobs Administration** tab. Click on **Invoice Configuration**.



6. Set the invoice template name in the **Default End of Month Invoice Template** field which you want to use as a default End Of Month invoice template.

NEILON JOBS ADMINISTRATION INVOICE CONFIGURATION X

Invoice Configuration
Configure default invoice templates, default invoice by for invoices in your organization.

Save Reset to System Default

▼ Invoice Detail

Default Invoice By ⓘ
Royal India Private Limited

Invoice Edit Mode ⓘ

▼ Invoice Email Templates

Default End of Month Invoice Template ⓘ
Default EOM Invoice Template

Default Prepaid Invoice Template ⓘ
Default Prepaid Invoice Template

- Click on the **Save** button to save the configuration.

Default Prepaid Invoice Template

The invoice email template will be used while sending invoices to the payee.

Follow the below steps to set the **Default Prepaid Invoice Template**.

- Navigate to the **Neilon Project Management** application from the App Launcher.
- Go to the **Neilon Jobs Administration** tab. Click on **Invoice Configuration**.

Neilon Project Man... Neilon Jobs Administration Request Manager Job Manager Job Calendar Invoice Manager Outstanding Invoices Email Invoices Invoice Reminders Review Invoice Feedbacks

NEILON JOBS ADMINISTRATION

System Configuration
Provide values needed to configure application for your organization.

Job Request Configuration
Configure external booking site URL for job requests in your organization.

Neilon Jobs Access Management
Grant or revoke Neilon Jobs access for your organization users.

Invoice Configuration
Configure default invoice templates, default invoice by for invoices in your organization.

- Here in the **Default Prepaid Invoice Template** field put the value of the invoice name
- Set the invoice template name in the **Default Prepaid Invoice Template** field which you want to use as a default prepaid invoice template.

NEILON JOBS ADMINISTRATION INVOICE CONFIGURATION X

Invoice Configuration
Configure default invoice templates, default invoice by for invoices in your organization.

Save Reset to System Default

▼ Invoice Detail

Default Invoice By ⓘ
Royal India Private Limited

Invoice Edit Mode ⓘ

▼ Invoice Email Templates

Default End of Month Invoice Template ⓘ
Default EOM Invoice Template

Default Prepaid Invoice Template ⓘ
Default Prepaid Invoice Template

- Click on the **Save** button to save the configuration.