System User Guide

User Guide for the Navsoft Invoice App

Version No.: 1.3.0

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1.0 Introduction

1.1 Document Purpose

The purpose of this User Guide is to explain **Navsoft Invoice App** setup on the Salesforce Lightning Platform. The document contains a table of contents, detailed information, and screenshots for better understanding.

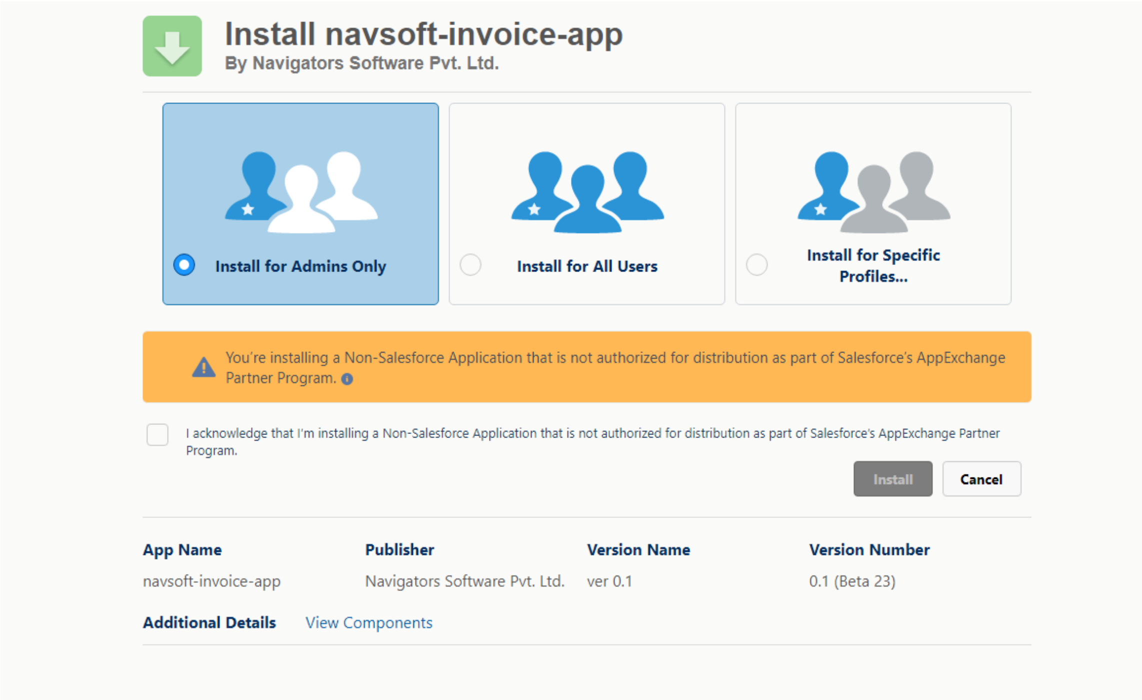
1.2 Application Overview

The **Navsoft Invoice App** on the **Salesforce Lightning platform** is designed to handle the creation, management, and tracking of invoices. This app streamlines the customization of the invoicing process, making it more efficient, accurate, and user friendly.

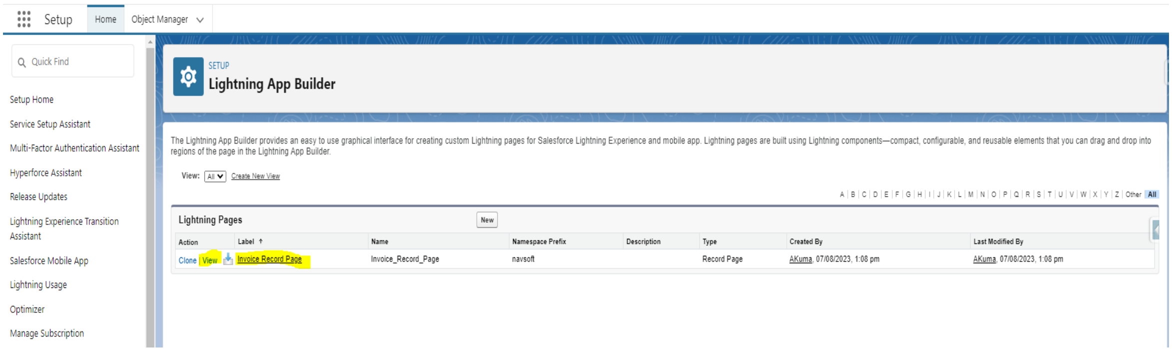
2.0 Getting Started

2.1 Installing the Navsoft Invoice Application

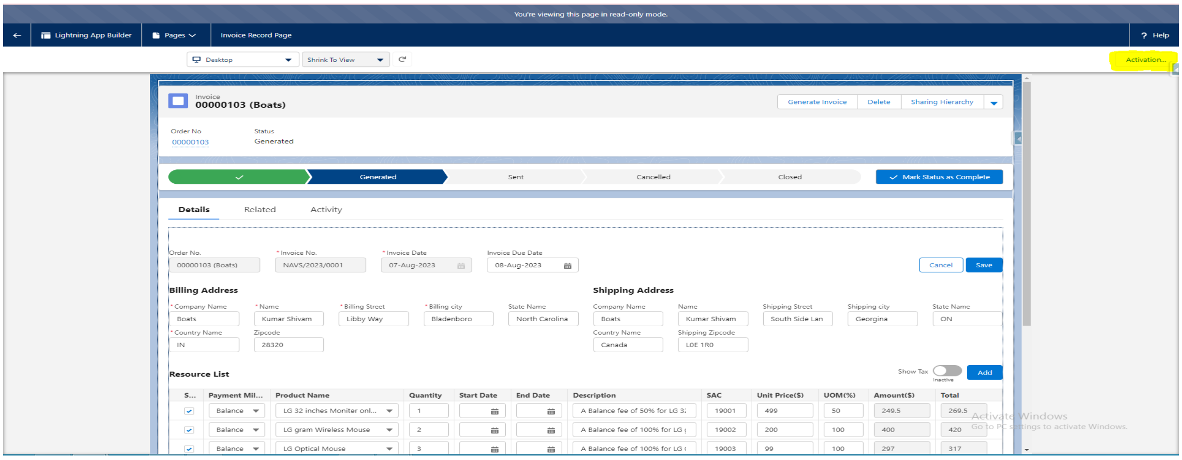
- Installing a third-party application like the **Navsoft Invoice Application** on the Salesforce Lightning Platform involves several steps. To install the **Navsoft Invoice Application** on the Salesforce platform, follow these general steps.
- Once the user clicks on the specific link, it asks the user to log in to the Salesforce Lightning Platform. Then, as below, a screen popup is displayed:



- For **All Users**,
  - Click on "**Install for All Users.**"
  - So that all the active users can access this application.
  - Here, it doesn't need to assign any permission set.
- For **Admin User,**
  - Check on "**Install for Admins Only.**"
  - So that the user needs to assign a permission set for "Admin user" or "Standard User."
  - So only that Admin User uses the application.
- For **Specific Profiles User,**
  - Check "**Install for Specific Profiles.**"
  - So that the specific user needs to assign a permission set for "Admin user."
  - So only that Specific Profile User uses the application.
- After the package is installed, follow the below steps to view the "**Invoice Record**" Page:
  - Click on "**Setup**",
  - Search the "**Lightning App Builder**" in quick find search box to view the result,
  - Click on the "**Lightning App Builder**" option,
  - Search for "**Invoice Record Page**" from the list and
  - Click on the "**View**" link in the Action column to open the details page as shown below:



- Click on "**Activation**", as mentioned in the below screenshot.



- If the path setting is not enabled,
  - Then the user has to "**Enable**" it (for enabling the path setting).
- Click on "**Setup.**"
- Search "**Path Settings**" in the Quick Find search box
- If the Phone and Email fields on the order object do not have access, go to the respective profile and allow access.
- **Prerequisites to be Considered:**
  - Before updating the stage of Opportunity to '**Closed Won**', various conditions must be considered, as below:
    - Contact roles should be there, with one as the primary contact.
    - One quote should be synced and must contain at least one product.
  - After the opportunity stage is '**Closed Won**', consider the following:
    - An Order and Contract are created in the background, and with that order, we can create an invoice.
    - Please maintain the 'Activated' Order status as is. Optionally, introduce two new statuses, namely 'Open' and 'Close', for Orders. These statuses will allow for operations without considering Contract validation.

        - In the 'Open' status, you can generate an Invoice for an Order, even if the associated Contract is not valid. Conversely, in the 'Closed' status, creating an Invoice is not possible, even if the Contract is valid.
        - A Contract is considered valid if it holds an 'Activated' status and its End date is either today or a future date.
    - For sending the Invoice PDF to the customer, it's essential to create an Email Template with the name 'Send Invoice PDF'.

2.2 User Permission in Navsoft Invoice Application

Setting up user permissions in the Navsoft Invoice Application within the Salesforce platform involves controlling what actions users can perform and what data they can access. Here's how you can manage user permissions in Salesforce for the Navsoft Invoice Application. We've made **two types** of user permissions responsible for this app, as mentioned:

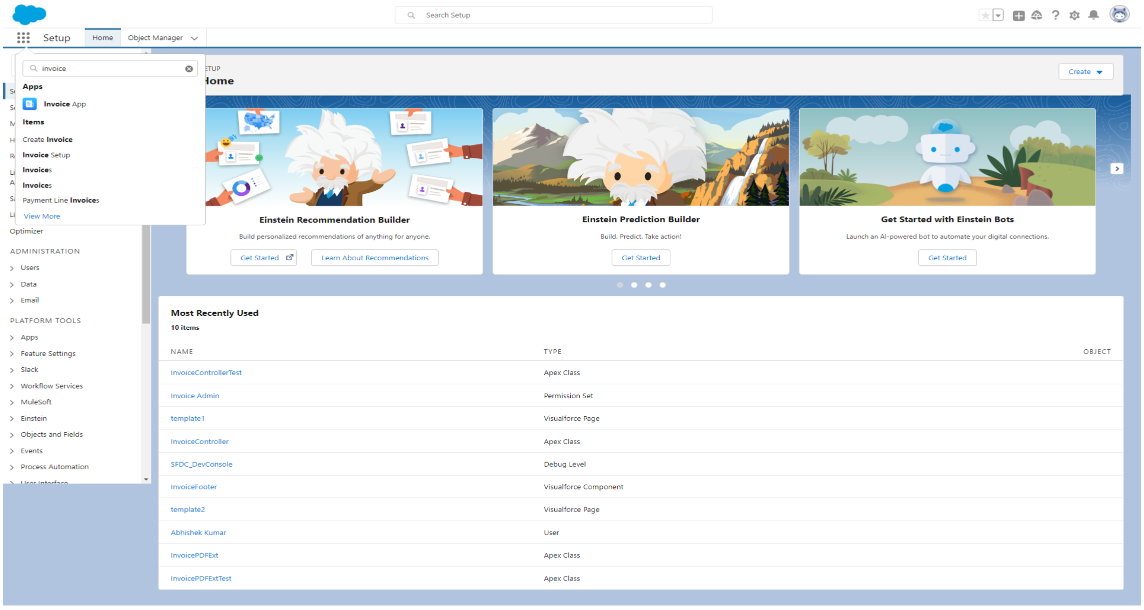
1. **Invoice Admin User Permission**:
    - For Admin permission, we need full access to the below objects and their fields (like “Read”, “Create”, “Edit”, “Delete”, “View All”, and “Modify All”).
2. **Invoice Standard User Permission**:
    - For Standard User Permission, we need full access to the below objects and their fields (like “Read”, “Create”, and “Edit”).

Below is the list of objects used in the **Navsoft Invoice Application**:

Object Name	Description
Account	-
Contact	-
Contract (Optional)	-
Order	-
Order Product	-
Invoice (navsoft__Invoice__c)	-
Invoice Product (navsoft__InvoiceItem__c)	-
Invoice Additional (Charges Item (navsoft__Invoice_Additional_Charge_Item__c)	Used to Store the Additional charges related to invoice record
Invoice Comments (navsoft__Invoice_Comments__c)	Used to Store the comments related to invoice record
Invoice Config (navsoft__Invoice_Config__c)	Stores all the details of the invoice setup tab.
Invoice Config Menu (navsoft__Invoice_Config_Menu__c)	Holds the menu of invoice items inside the invoice setup.
Invoice Config Menu Item (navsoft__Invoice_Config_Menu_Item__c)	Store the value of inside the invoice configuration menu
Invoice Tax Item (navsoft__Invoice_Tax_Item__c)	Used to Store the tax item related to invoice record
Error Log(navsoft_Error_log__c)	Used to store error log

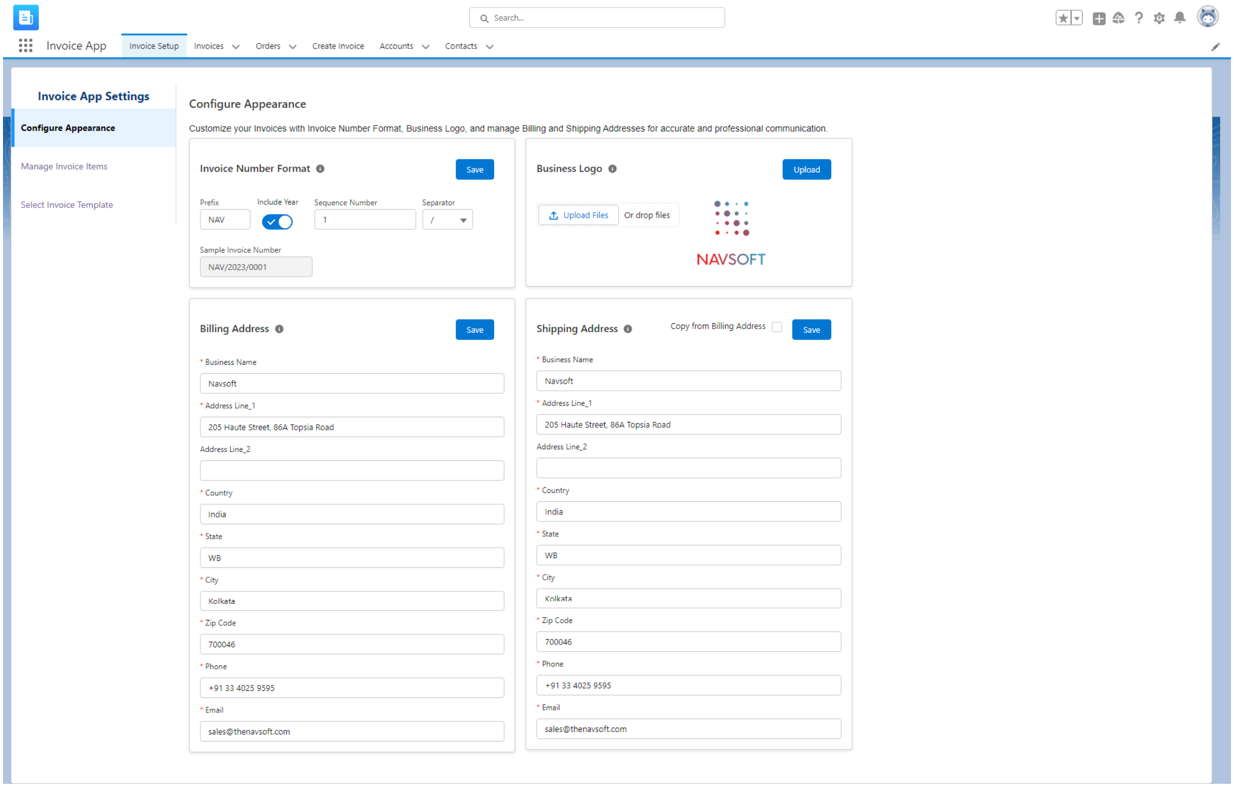
2.3 Invoice App

In order to set up or configure **Invoice App** features, an authorized user must login to the Salesforce Lightning platform, then search **Invoice App** from the App Launcher menu icon, and navigate to the configuration part of the Navsoft Invoice App as mentioned below:



2.3.1 Set Up "Configure Appearance"

- The "Configure Appearance" in Salesforce platform allows the user to control which details and information are displayed on the App Details page for each app in the Salesforce App Launcher. Here's how to set up "Configure Appearance":
- After opening the "**Invoice App**", it shows various tab options to perform the operation, as mentioned below:
    - Invoice Setup
    - Invoices
    - Orders
    - Create Invoice
    - Accounts
    - Contacts
- Before the user can deal with the Configure Appearance setup menu, it must customize the invoices with various options for accurate and professional communication. After that, it will be saved in the system database using the below mentioned methods or setups:



Setup Step 1: "Invoice Number Format."

Invoice Number Format allows the user to customize the structure of the invoice numbers. It can modify the following fields to create a unique and organized invoice numbering system;

- **Prefix:** Add a prefix to the invoice number for better categorization.
- **Include Year:** Choose whether to include the current year in the invoice number.
- **Starting Sequence Number:** Set the starting sequence number for the invoices.
- **Separator:** Define a separator to visually separate parts of the invoice number.

Setup Step 2: “Business Logo”

A business logo allows the user to display the company’s logo on invoices. It enhances the brand identity and provides a professional touch to communications. The user can upload a high-resolution image in formats like PNG or JPEG. The recommended dimensions for the logo are [255*255].

Setup Step 3: “Billing Address”

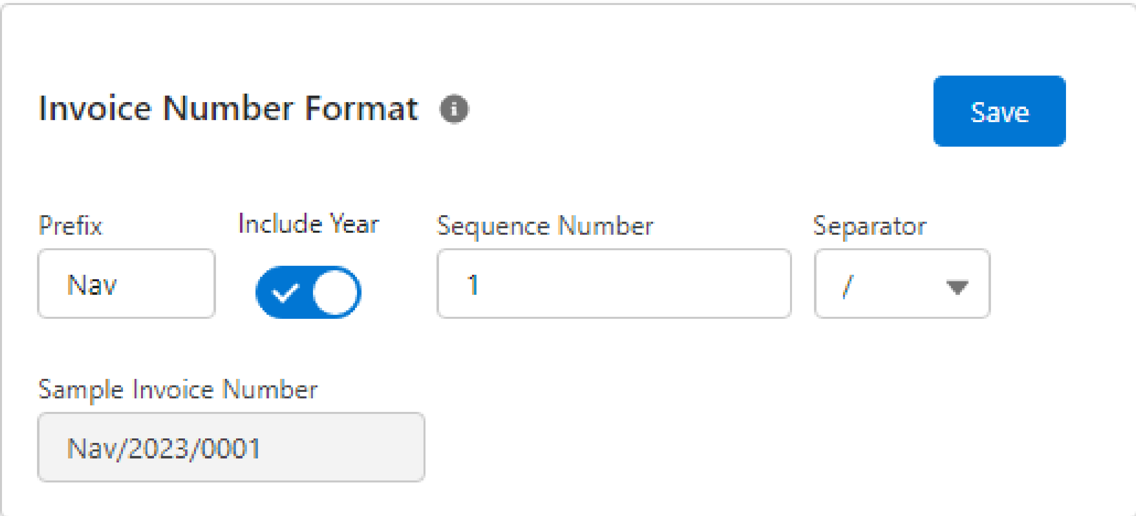
Billing Address refers to the primary contact information associated with the invoice recipient. This information is essential for accurate invoicing and communication with your customers. Please ensure that the billing address is up-to-date and accurate.

Setup Step 4: “Shipping Address”

The shipping address refers to the location where the goods or services will be delivered. If the Shipping Address is different from the Billing Address, you can manually enter the address details. Alternatively, you can click the '**Copy from Billing Address**' checkbox to automatically populate the Shipping Address with the same information as the Billing Address. Please ensure that the Shipping Address is up-to-date and accurate.

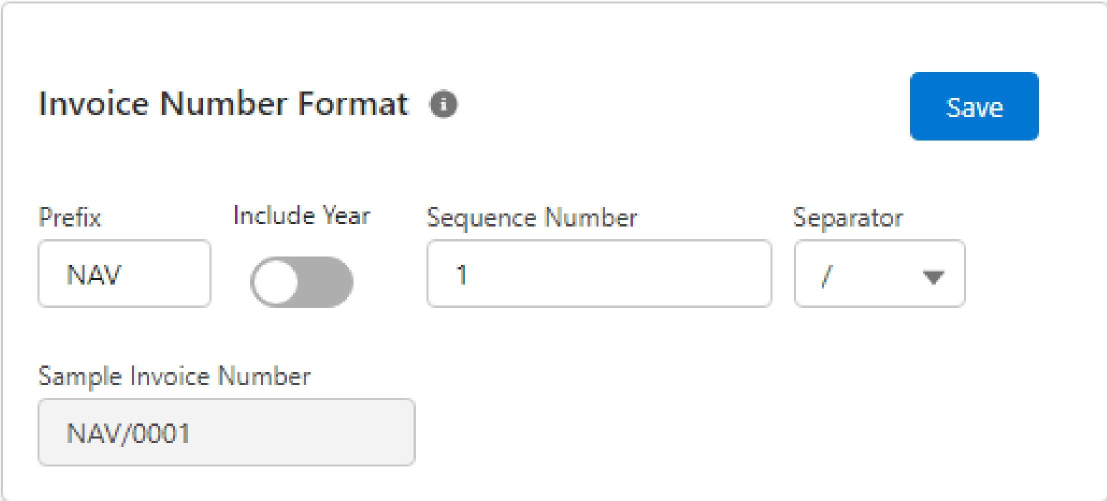
2.3.1.1 Setup Step 1: Invoice Number Format:

- Setting up the Invoice Number Format under the **Configure Appearance** module for the final invoice is a crucial step in generating accurate and consistent invoice numbers. Here's how to set up the Invoice Number Format for the final invoice.
- Invoice Number Format allows the user to customize the structure of the invoice numbers. It can modify the following fields to create a unique and organized invoice numbering system;
    - **Prefix:** Add a prefix to the invoice number for better categorization.
    - **Include Year:** Choose whether to include the current year in the invoice number.
    - **Starting Sequence Number:** Set the starting sequence number for the invoices.
    - **Separator:** Define a separator to visually separate parts of the invoice number.
- Follow the steps below to set up this section:
    - ❖ Go to "**Invoice Setup**" tab menu option,
    - ❖ Under the **Configure Appearance** module, set up the "Invoice Number Format" section to view on the final invoice, as mentioned:
        - ➢ Mouseover on "**i**" button triggers a tooltip or pop-up box that displays helpful information about the invoice number format.
        - ➢ In the "Prefix" field of an invoice number format, the user specifies a set of characters or a word that appears at the beginning of each invoice number in a result.
        - ➢ In the "Include Year" field option, add the current year in the final invoice number; it needs to be modified. This toggle allows the user to select whether they want to include the current year in the invoice number or not.
            - ■ **If "Include Year" is toggled,** - Here it will include the current year from the system and then update it in the "Sample Invoice Number" field as a result. For example, if the current year is 2023, the sample invoice number format will be "Prefix"/"2023"/"Sequence Number". Refer to the below screenshot for better understanding.



[Invoice number Format - with toggled include year]

- ■ **If Include Year is not toggled,** - Here it does not include the current year in the "Sample Invoice Number" field as a result. For example, the sample invoice number format is "Prefix"/"Sequence Number" Refer to the below screenshot for a better understanding.



[Invoice number Format - with not toggled include year]

➢ In the “Sequence Number” field option, the sample invoice number is a numeric value that uniquely identifies each invoice within a sequence or series (like, for given sequence number of “1”, the sample invoice number will be “0001” and so on). It's typically used to ensure that each invoice has a distinct identifier. Here's an example of an invoice number format **(Nav/2023/0001)** that includes a sequence number with the below details:
  - Prefix: NAV (for "Navsoft")
  - Include Year: 2023
  - **Sequence Number: 1**
  - Separator: /

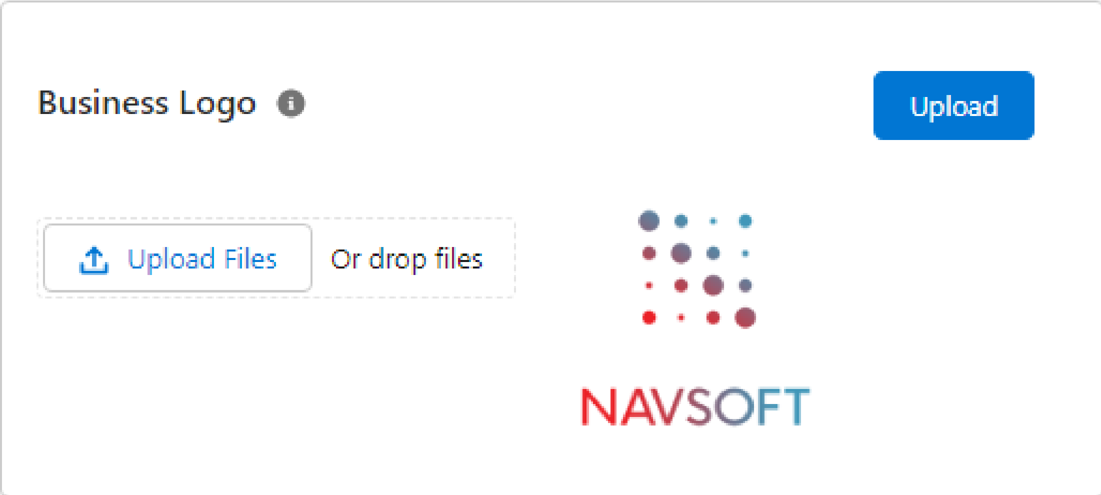
➢ A separator in a sample invoice number is a character or symbol used to separate different components or elements within the invoice number format. The choice of separator can vary, and it often depends on preferences and invoicing system capabilities. In the “Separator” dropdown field, select and choose any one of the separators to view the final invoice number as a result, which will be separated and viewed accordingly. Here's an example of an invoice number format **(FG/2023/0001)** with a slash (“/”) separator and below details:
  - Invoice Prefix: NAV (for "Navsoft")
  - Include Year: 2023
  - Sequence Number: 1
  - **Separator: "/"**

➢ In the “Sample Invoice Number” field, it automatically fetches and combines the above given field data and shows it using the separator as per the below screenshot:

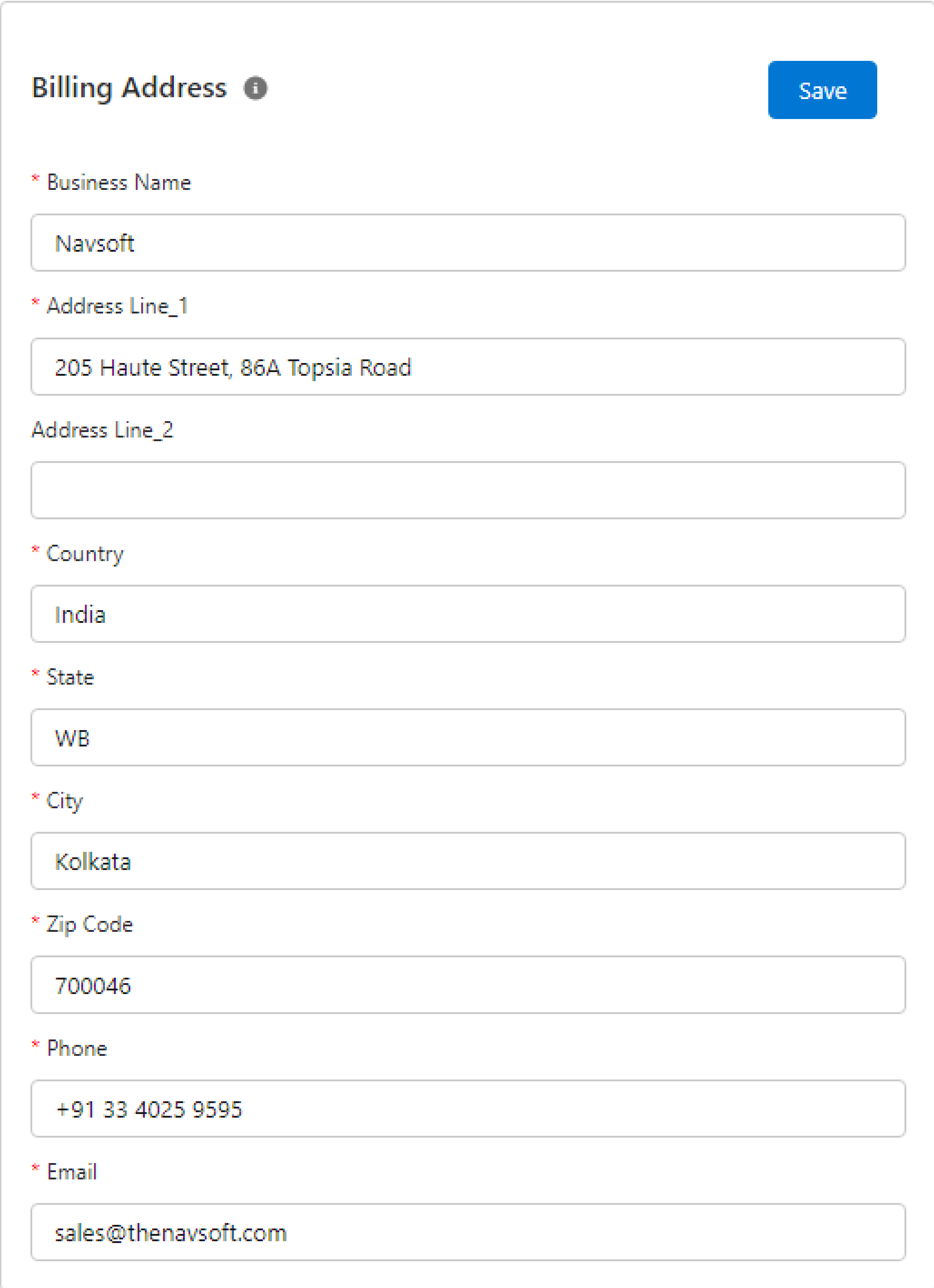
➢ Click on the “**Save**” button on the specific module, to save the above given details into the system database.

2.3.1.2 Setup Step 2: Business Logo:

- Follow the steps below to set up this module:
  - ❖ Go to “**Invoice Setup**” tab option,
  - ❖ Under the **Configure Appearance** module, configure the field option of this module to be displayed in the final invoice as mentioned:
    - ➢ In the “**Business Logo**” field,
    - ➢ Mouseover on "**i**" button triggers a tooltip or pop-up box that displays helpful information about the business logo details.
    - ➢ Upload the specific logo file (as per the given format) from the system by clicking the “Upload files or Drop Files” button. Click on the “Upload” button to view the uploaded logo, as mentioned in the below screenshot.



2.3.1.3 Setup Step 3: Billing Address:

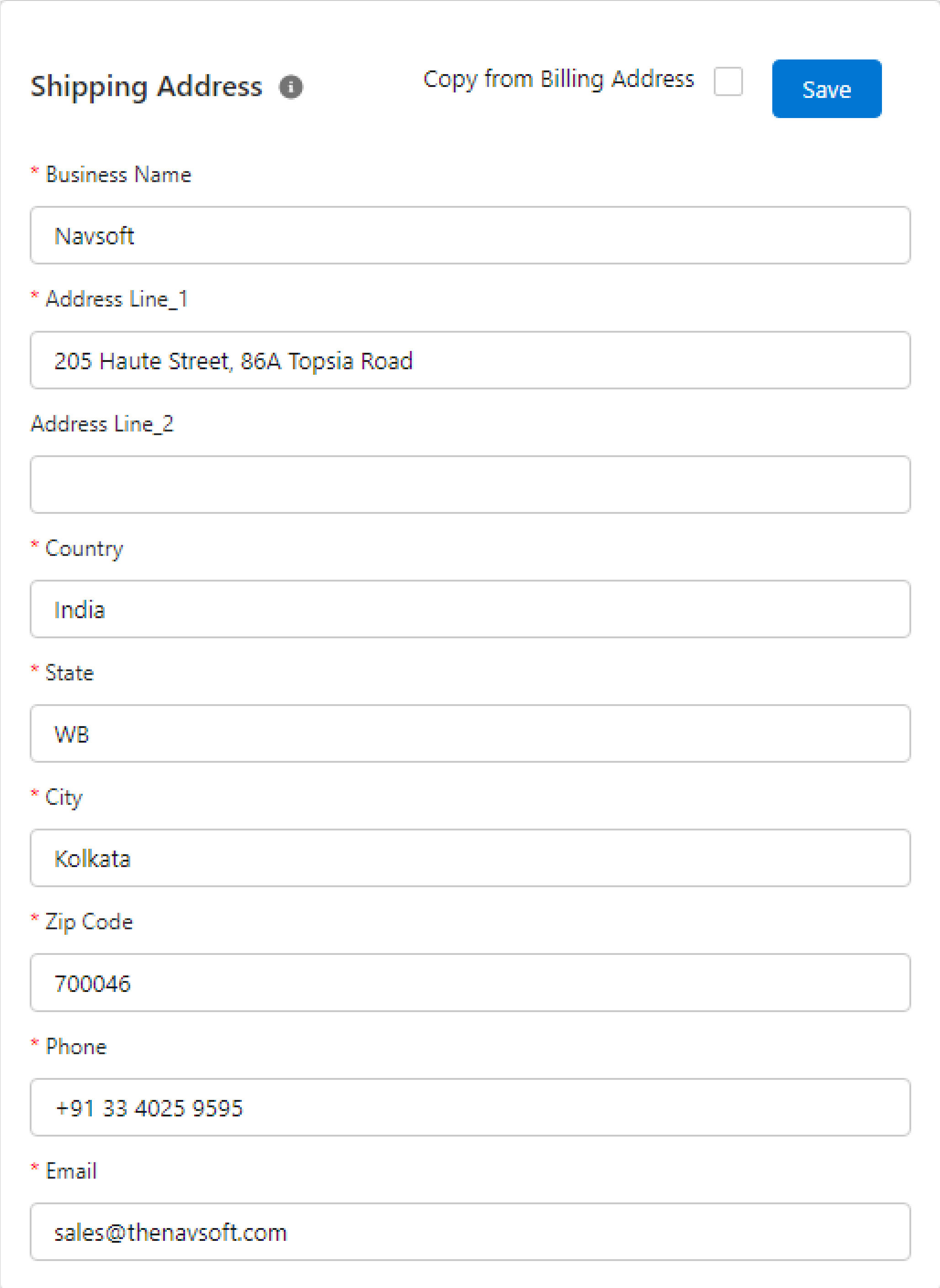


- Follow the steps below to set up this module:
  - ❖ Go to “**Invoice Setup**” tab option,
  - ❖ Mouseover on "**i**" button triggers a tooltip or pop-up box that displays helpful information about the billing address details.
  - ❖ Under the **Configure Appearance** module, configure the field option of this module to view in the final invoice as mentioned in the table:

Field Name	Field Type	Description
Business name	mandatory	Fill in the specific business name to view in the invoice
Address Line_1	mandatory	fill the specific address to view in the invoice
Address Line_2	non-mandatory	fill the specific address to view in the invoice
Country	mandatory	Fill in the specific country name to view in the invoice.
State	mandatory	choose the specific state as per the country they wish to view in the invoice
City	mandatory	chooses and selects the specific city as per the country and state chosen to view in the invoice
Zip Code	mandatory	gives the specific zip code as per the city chosen to be displayed in the invoice
Phone	mandatory	gives the specific phone number to view in the invoice
Email	mandatory	gives the specific email address to view in the invoice.

➢ To save the above details into the system database, click on the “**Save**” button in the specific module section.

2.3.1.4 Setup Step 4: Shipping Address:



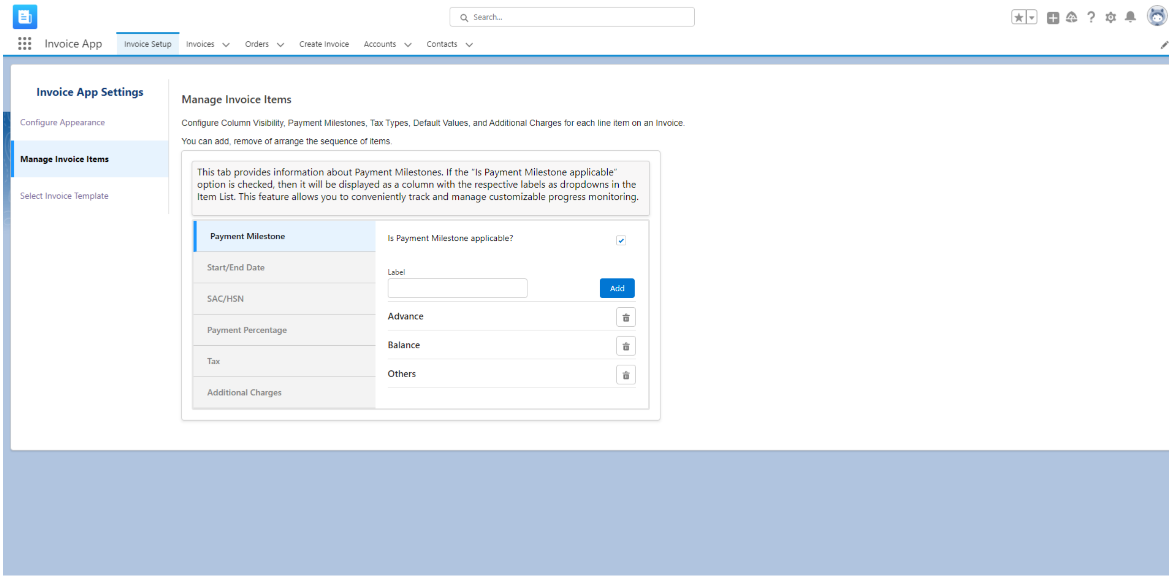
- Follow the steps below to set up this module:
  - ❖ Go to "**Invoice Setup**" tab option,
  - ❖ Mouseover on "**i**" button triggers a tooltip or pop-up box that displays helpful information about the shipping address details.
  - ❖ Under the **Configure Appearance** module, configure the field option of this module to view in the final invoice as mentioned in the table:

  - ➢ By checking the "Copy from Billing Address" field, it allows the user to automatically populate the shipping or delivery address fields with the same information as the billing address to save time and reduce data entry errors
  - ➢ If the user unchecks this option, then fill out the details field option as above in the billing address section.
- ❖ To save the above details into the system database, click on the "**Save**" button in the specific module section.

2.3.2 Invoice Items

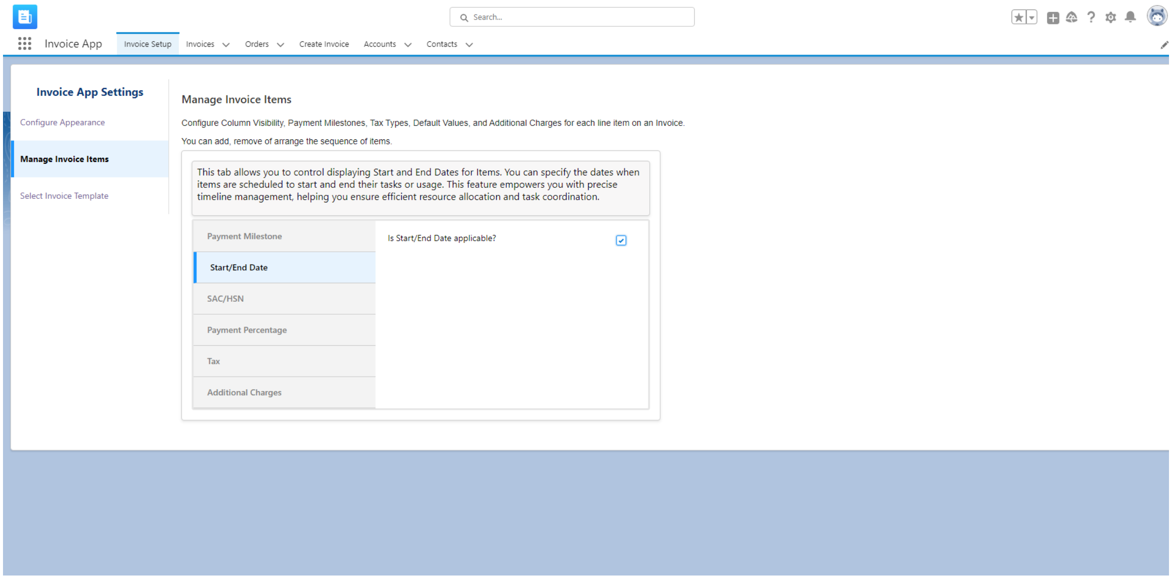
- Follow these steps sequentially to set up the menu "**Manage Invoice Items"** by filling out the various module options.
- Here the user configures column visibility, Payment Milestones, Tax Types, Default Values, and Additional Charges for each line item on an Invoice. Also, the user can add, remove or arrange the sequence of items.
- Before the user can deal with the "**Manage Invoice Items**" Setup menu, it must finish them, and they will be saved in the system database using the below mentioned methods or setups:
  - Payment Milestone
  - Start/End Date
  - SAC/HSN
  - Payment Percentage
  - Tax
  - Additional Charges

2.3.2.1 Payment Milestone:



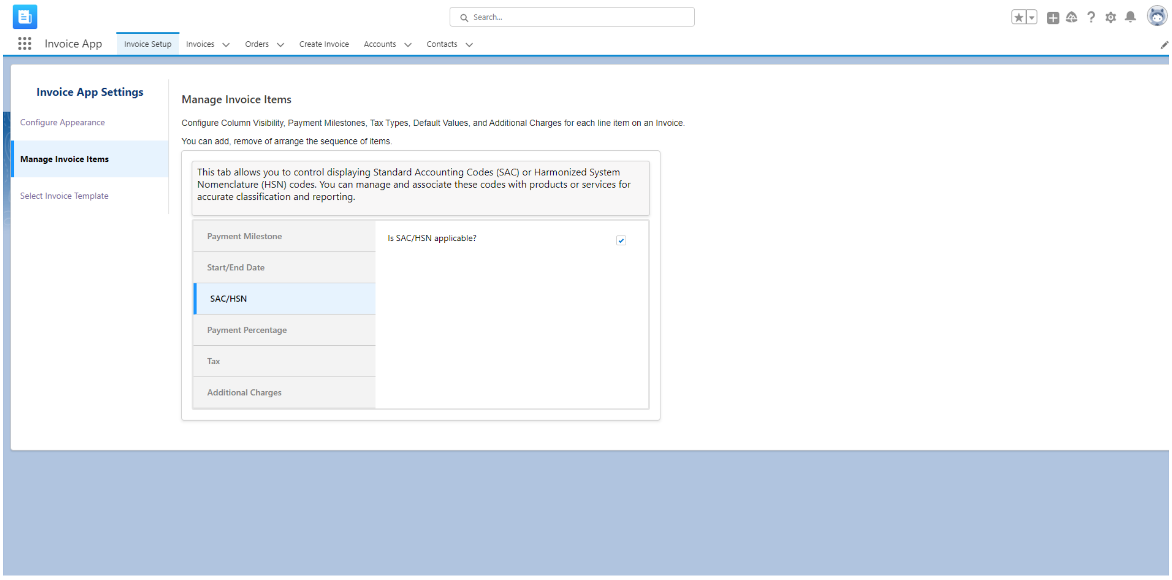
- Follow the steps below to set up this module:
  - ❖ Go to "**Invoice Setup**" tab option,
  - ❖ Under **Manage Invoice Items** module, configure the field option of "Payment Milestone" module to view in the final invoice as mentioned:
  - ❖ **Is the payment milestone applicable? -**
    - o If the user checks this option, the payment milestone column will be added to the resource list column at the time of generating the invoice.
    - o If the user unchecks this option, the payment milestone column will not be added to the resource list column at the time of generating the invoice.
  - ❖ **Label -**
    - o In this field option, the user can add multiple labels by giving the label name in the field (example: advance, remaining, etc.) and clicking the "**Add**" button to add the specific column for this label at the time of invoice creation.
    - o To delete the specific label name, click the "**Delete**" icon.
    - o The user can reshuffle the specific label by dragging and dropping the label to reflect in the invoice.
    - o By clicking the "**delete**" icon on specific label option, the user can delete the label from the list.

2.3.2.2 Start/End Date:



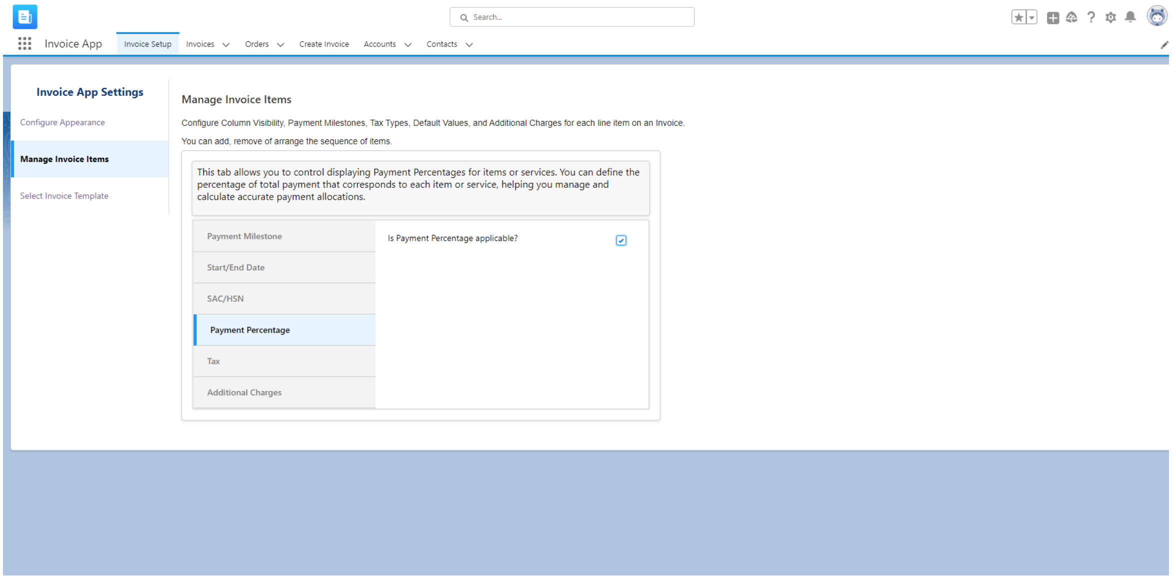
- Follow the steps below to set up this module:
  - ❖ Go to "**Invoice Setup**" tab option,
  - ❖ Under the **Manage Invoice Items** setup menu, configure the field option "**SAC/HSN**" to view in the final invoice as mentioned.
  - ❖ **Is Start/End Date Applicable? -**
    - o If checked, the Start/End Date column will be added to the resource list column at the time of generating invoice, and it shows the Start/End Date label options at the time of invoice creation.
    - o If unchecked, the Start/End Date column will not be added to the resource list column at the time of generating the invoice.

2.3.2.3 SAC/HSN:



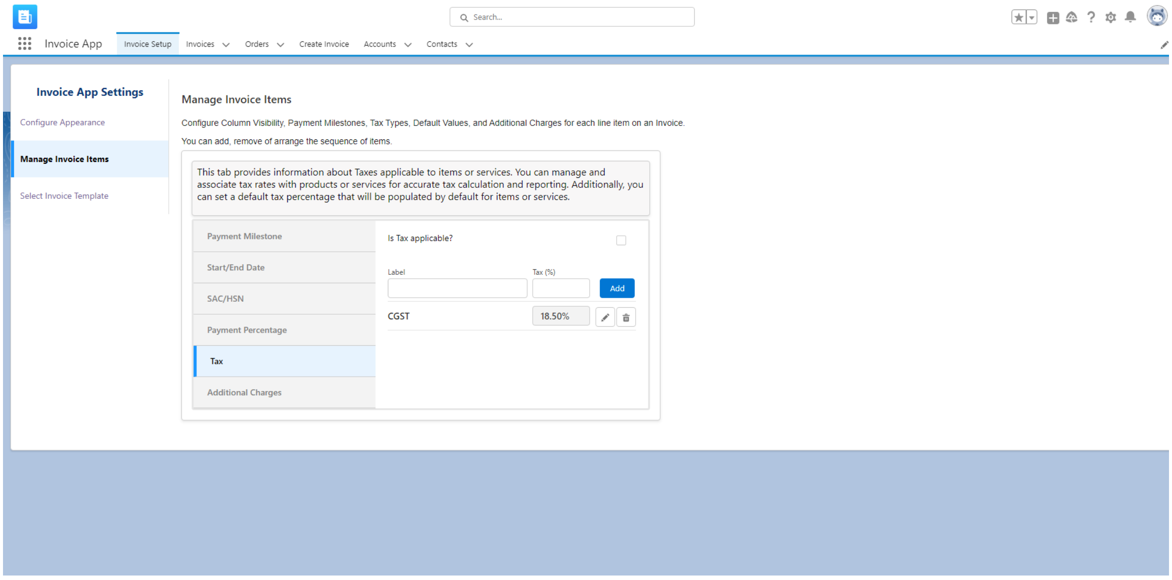
- Follow the steps below to set up this module:
  - ❖ Go to “**Invoice Setup**” tab option,
  - ❖ Under the **Manage Invoice Items** setup menu, configure the field option “**SAC/HSN**” to view in the final invoice as mentioned.
  - ❖ **Is SAC/ HSN Applicable? -**
    - o If checked, the SAC/HSN column will be added to the resource list column at the time of generating invoice, and it shows the SAC/HSN label options at the time of invoice creation.
    - o If unchecked, the SAC/HSN column will not be added to the resource list column at the time of generating the invoice.

2.3.2.4 Payment Percentage:



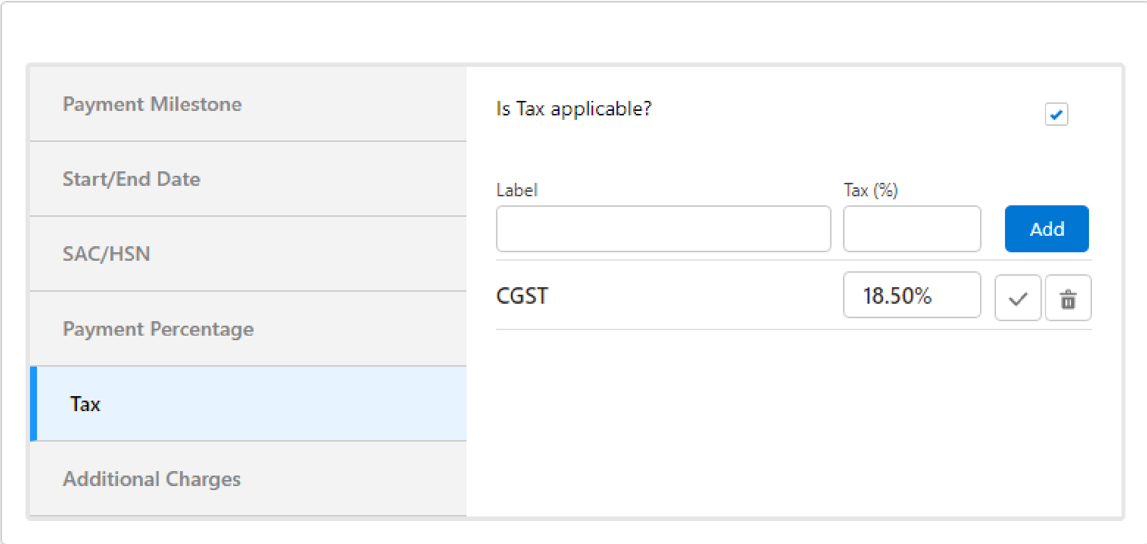
- Follow the steps below to set up this module:
  - ❖ Go to the "**Invoice Setup**" tab option,
  - ❖ Under the **Manage Invoice Items** setup menu, configure the field option "**Payment Percentage**" to view in the final invoice as mentioned.
  - ❖ **Is Payment Percentage Applicable? -**
    - o If checked, the payment percentage column will be added to the resource list column at the time of generating invoice, and it shows the payment percentage label options at the time of invoice creation.
    - o If unchecked, the payment percentage column will not be added to the resource list column at the time of generating the invoice.

2.3.2.5 Tax:



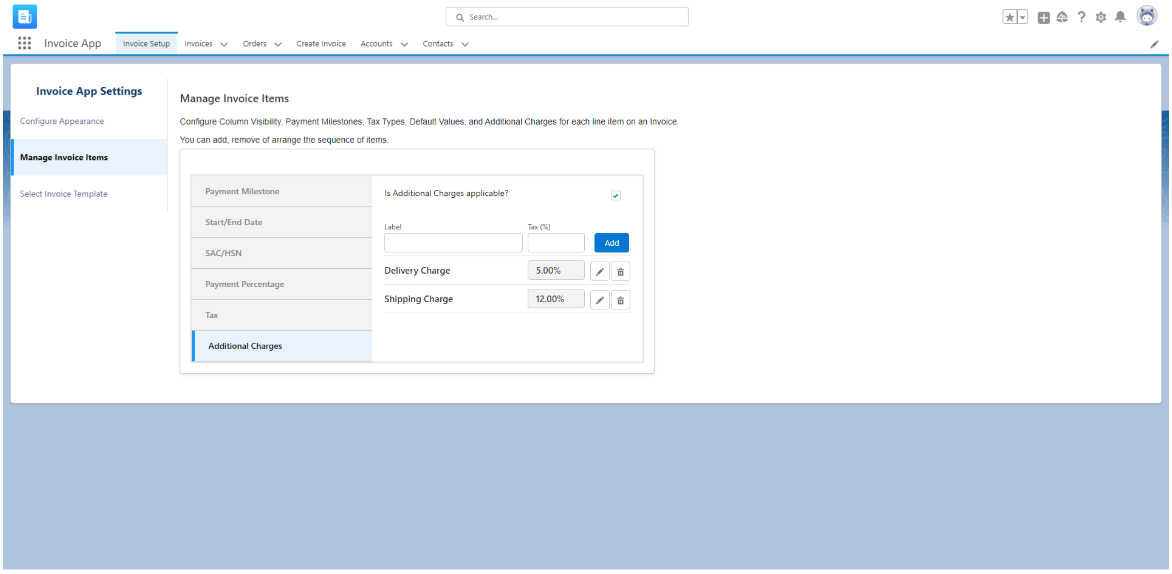
- Follow the steps below to set up this module:
  - ❖ Go to "**Invoice Setup**" tab option,
  - ❖ Under the **Manage Invoice Items** setup menu, configure the field option "**Tax**" to view in the final invoice as mentioned.
  - ❖ **Is Tax Applicable? -**
    - o If checked, the tax column will be added to the resource list column at the time of generating invoice, and it shows the tax label options at the time of invoice creation.
    - o If unchecked, the tax column will not be added to the resource list column at the time of generating invoice.
  - ❖ **Label -**
    - o In this field option, add multiple labels by giving the label name (example: SGST, CGST, IGST, etc.).
    - o **Tax (%) -**
      - ▪ The "Tax (%)" label in the Manage Invoice Items for tax label section

        typically refers to the percentage of tax that applies on an invoice. The tax rate, usually in percentage form, that applies to the items listed in the invoice. This tax is typically a sales tax or any other tax that is imposed by local or national tax authorities.
      - ▪ To edit and save the specific tax (%) of the specific label, click the "**Edit**" and "**Save**" icon as mentioned below in the screenshot;

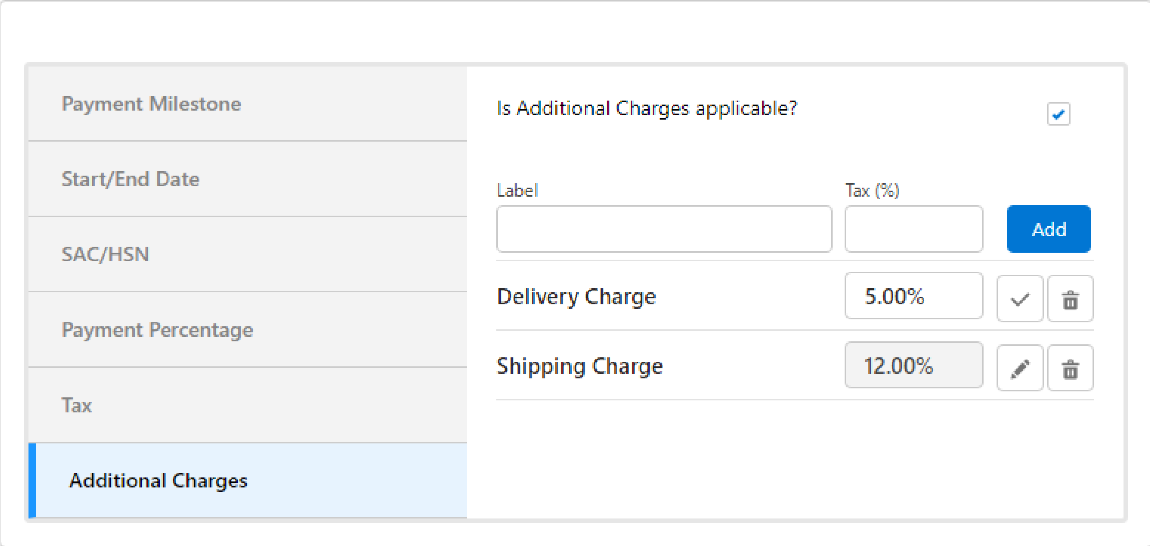


- To delete the specific label name, click the “Delete” icon.
- The user can reshuffle the specific label by dragging and dropping the label to reflect in the invoice.

2.3.2.6 Additional Charges:

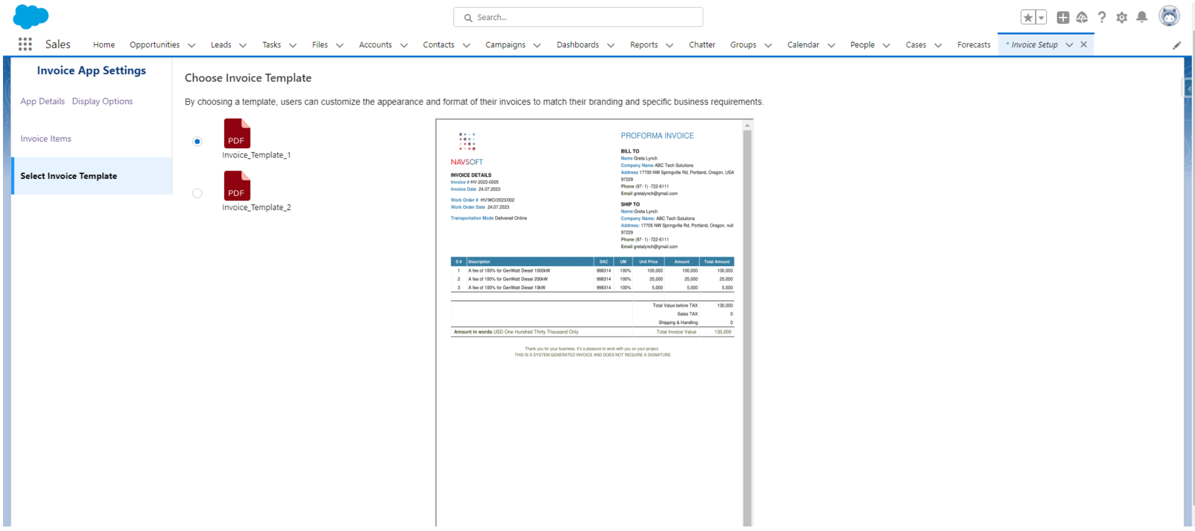


- Follow the steps below to set up this module:
  - Go to “Invoice Setup” tab option,
  - Under the **Manage Invoice Items** module option, configure the field option of “Additional Charges” to view in the final invoice as mentioned:
  - **Is Additional Charges Applicable? -**
    - If checked, the respective sections will be added to the “**Create Invoice**” page.
    - If unchecked, the tax column will not be added to the resource list column at the time of generating the invoice.
  - **Label -**
    - In this field option, add multiple labels by giving the label name (example: Delivery charge, Shipping charge, etc.).
    - **Tax (%) -**
      - The "Tax (%)" label in the Manage Invoice Items for “Additional Charges" section typically refers to the percentage of tax that applies to the additional charges on an invoice. The tax rate, usually in percentage form, that applies to the additional charges listed in the invoice items. This tax is typically a sales tax or any other tax that is imposed by local or national tax authorities.
      - To edit and save the specific tax (%) of the specific label, click the “**Edit**” and then “**Save**” icon as mentioned below in the screenshot;



- To delete the specific label and tax (%), click the "**Delete**" icon.
- The user can reshuffle the specific label by dragging and dropping the label to reflect it in the invoice.

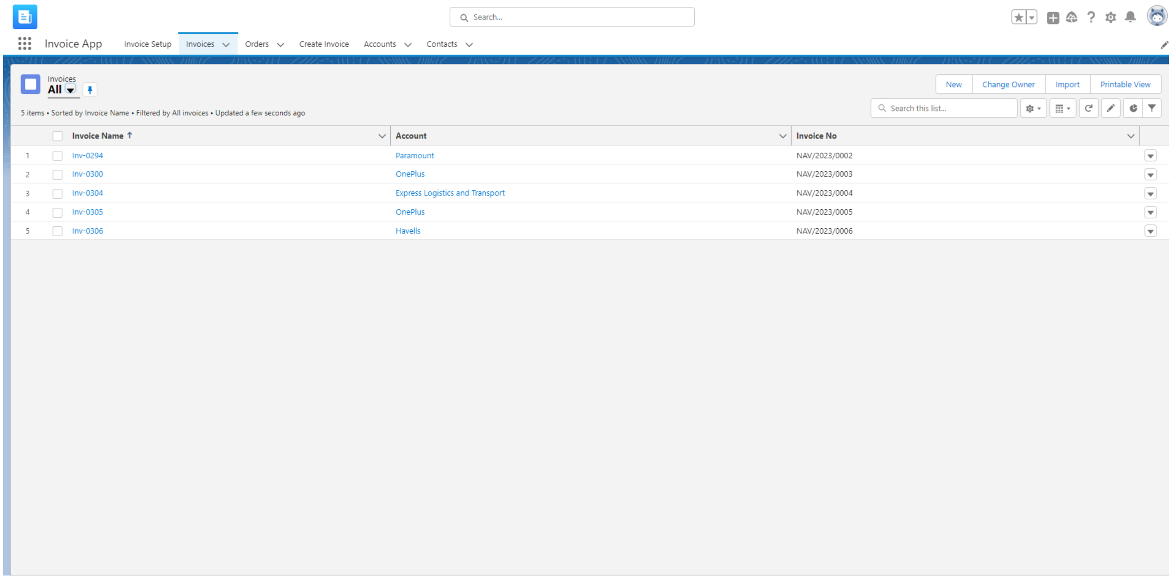
2.3.3 Select Invoice Templates



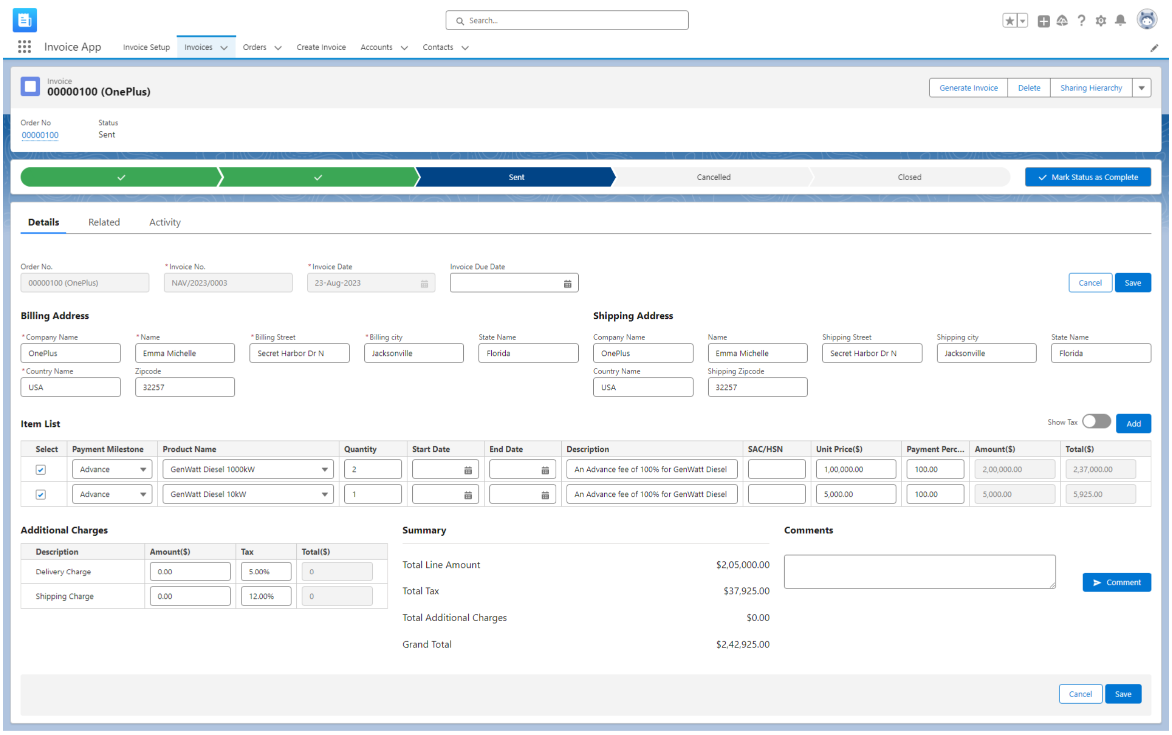
- By setting up the menu "**Select Invoice Template"** and choosing the specific invoice template, the user can customize the appearance and format of their invoices to match their branding and specific business requirements.
- By choosing any of the following options from the list, it shows the respective invoice template format (considering the above details) on the right hand side of the panel to confirm. It shows the success alert message, i.e., "**Template Saved Successfully.**" and the same template will be used during invoice PDF generation.

2.4 Invoices

- This tab option shows the list view page with the record details of the invoice and is used to store the record of the invoice. Here, the user can edit/change the details of the created invoice.



- By clicking on any of the created invoice numbers, It shows the details of the steps of method processing as mentioned: Created, Generated, Sent, canceled, and Closed.



- After changing the details for the specific invoice, it generates the invoice by clicking the "**Generate Invoice**" button (*function:* first it saves the details in the system database in the backend and generates the invoice in pdf format).

- In another way, if the user wants to change any details in the created invoice, the user has to click the “**Save**” button to save the invoice details and generate the invoice by clicking on the “Generate Invoice” button.
- By clicking on the “Cancel” button, it redirects the user to the previously opened page.

2.5 Orders

- To create an invoice, we need an order. An order contains An account, a contact, a contract (Optional), and order product object details.
- We have added a custom field to this "Order" tab, remaining fields are standard objects of order.

Below are the minimum fields of objects required to create the invoice:

Objects Name	**Fields Name**
Account	Account Name
Contact	Last Name
Opportunity	All the standard object
Opportunity Product	All the standard object
Opportunity Contact Role	All the standard object
Contract (Optional)	Account Name
	Status
	Contract Start Date
	Contract Term (months)
Order	Account Name
	Order Number
	Contract Number (If Contract Required)
	Order Start Date
	Status
	Email (navsoft__Email__c)
	Phone (navsoft__Phone__c)
	Bill To Contact
	Billing Address
	Ship To Contact
	Shipping Address
Order Product (OrderItem)	Product

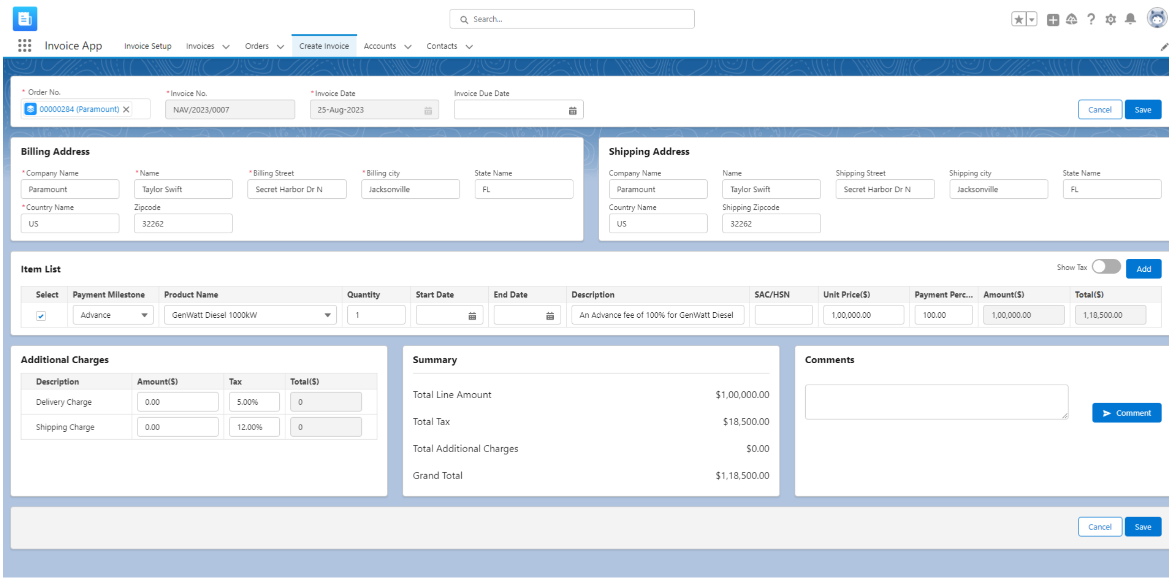
	Quantity
	List Price

2.6 Create invoice

- In this tab, the user creates or customizes the invoice format. By entering the order number, it maps the fields to the order number and fetches details in the respective field, as shown in the below-mentioned table:

Label Name	Function	Map the Order Field Name
Order No.	the fields can be searched either by “Order”, “Account” or “Contract”	Order Number (Auto Number)
Invoice No.	Auto Generated, read only mode	NA
Invoice Date	fetch today's Date and read only mode	NA
Invoice Due Date	fills in the field (Date Type)	NA

- As per the format configured in the “Invoice Setup” section:



  - In the “**Billing Address**” section of “Create Invoice”, it automatically fetches the details as per the label name as described in the below table:

Create Invoice Label Name	**Type**	**Function**	**Maps with the Order Field Name**
Company Name	Mandatory	autofetch & editable	Account Name
Name	Mandatory	autofetch & editable	Bill To Contact
Billing Street	Mandatory	autofetch & editable	Billing Address (BillingStreet)
Billing City	Mandatory	autofetch & editable	Billing Address (BillingCity)
State Name	Non - Mandatory	autofetch & editable	Billing Address (BillingState)
Country Name	Mandatory	autofetch & editable	Billing Address (BillingCountry)
Zip Code	Non - Mandatory	autofetch & editable	Billing Address (BillingPostalCode)

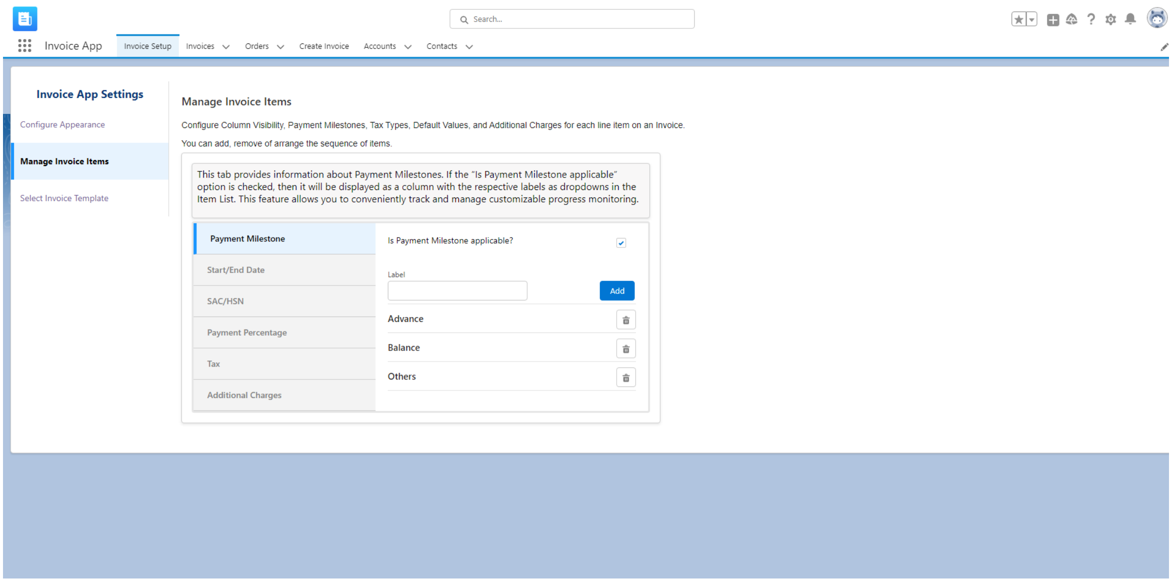
- In the "**Shipping Address**" section, it fetches the same field detail options as "Billing Address," as mentioned below in the table:

Create Invoice Label Name	**Type**	**Function**	**Maps with the Order Field Name**
Company Name	Mandatory	autofetch & editable	Account Name
Name	Mandatory	autofetch & editable	Ship To Contact
Shipping Street	Mandatory	autofetch & editable	Shipping Address (ShippingStreet)
Shipping City	Mandatory	autofetch & editable	Shipping Address (ShippingCity)
State Name	Non - Mandatory	autofetch & editable	Shipping Address (ShippingState)
Country Name	Mandatory	autofetch & editable	Shipping Address (ShippingCountry)
Shipping Zip Code	Non - Mandatory	autofetch & editable	Shipping Address (ShippingPostalCode)

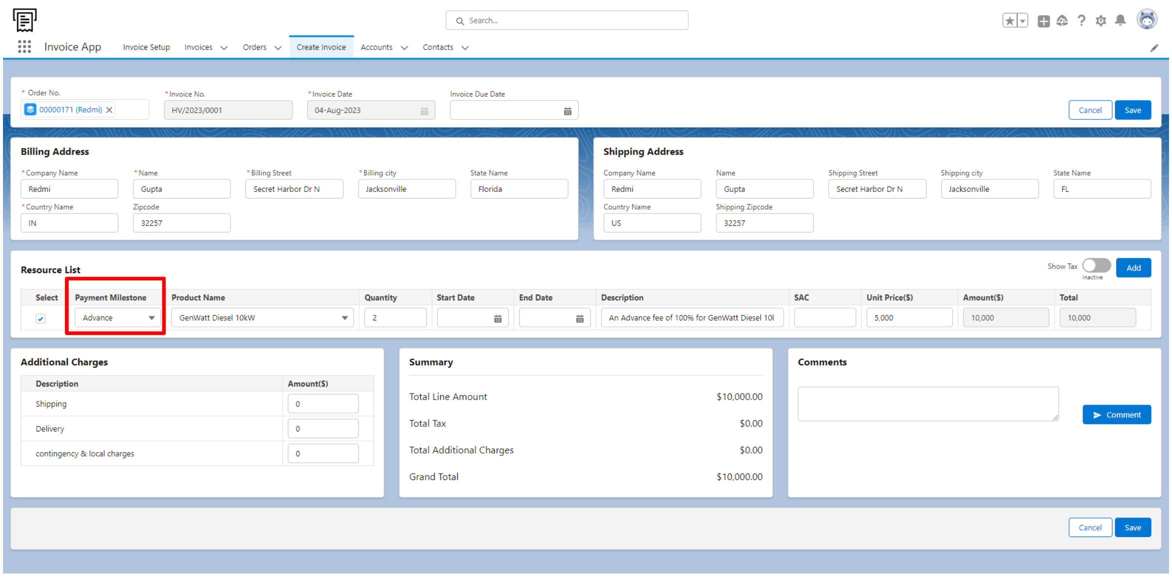
- In the “**Resource List**” section, it fetches against the specific order number and shows the product details list as a column field option as per the setting or configuration of the invoice setup.

Create Invoice Label Name	Order Product Field Name
Product Name	Product
Quantity	Quantity
Unit Price($)	Unit Price

- If the “Is Payment Milestone applicable” option is **checked** under “**Manage Invoice Items**” setup menu, then it will be displayed as a column with the respective labels as dropdowns in the resource list table section [refer to the below screenshots (1) and (2)]. Please refer to the below screenshots for better understanding:

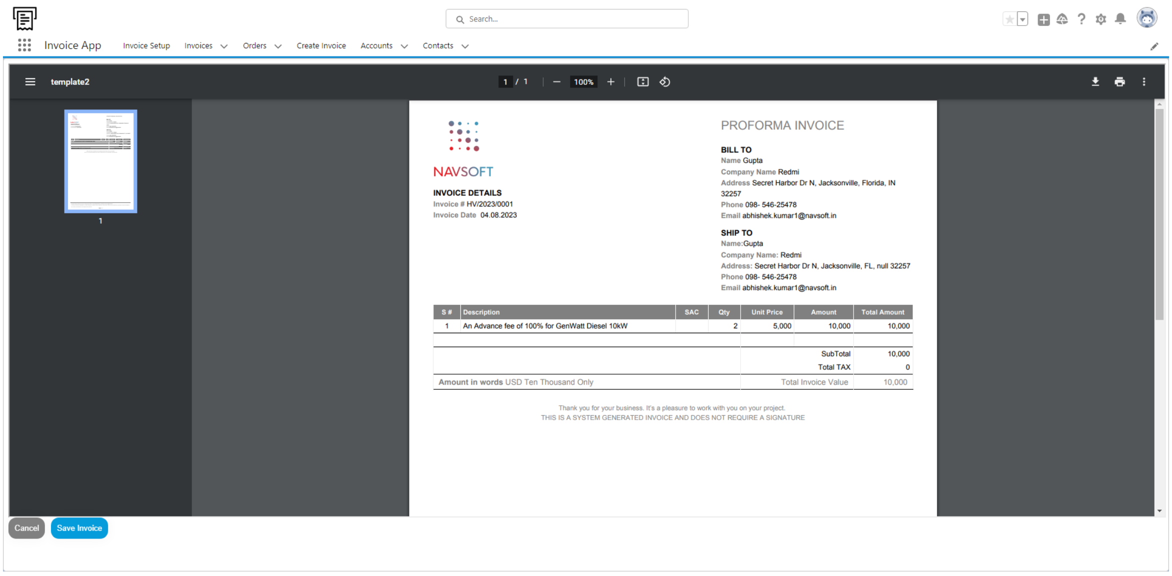


*Screenshot (1) → [If check the option **“Is Payment Milestone applicable”**]*



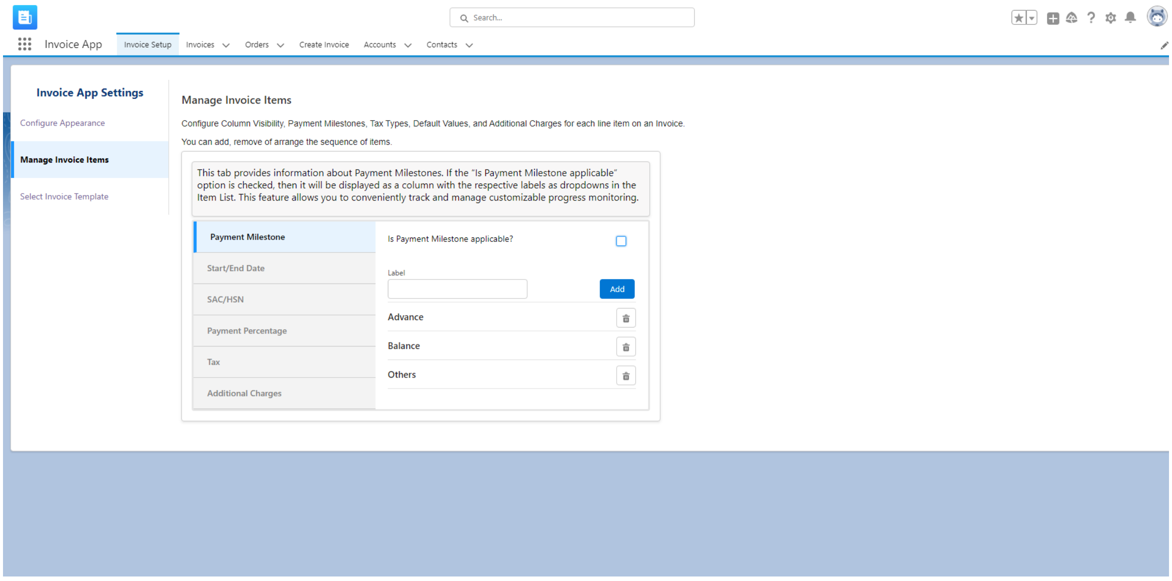
*Screenshot (2) → [Show the **"Payment Milestone"** column with the label option in the dropdown.]*

- But in the final invoice (which is generated in pdf format), then in the description column [refer to the below screenshot (3)].

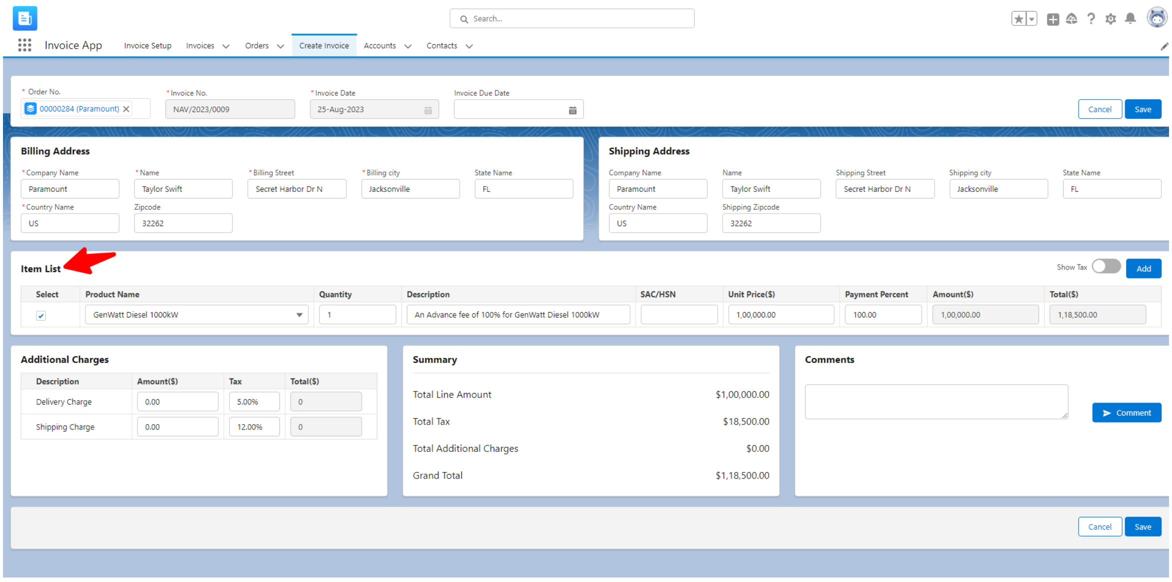


Screenshot (3) → [In Final invoice (in pdf), it does not show the "Payment Milestone" column with the label.]

- As per the requirement, if the "Is Payment Milestone applicable" option is **unchecked** under "Manage Invoice Items" for the Invoice App Setting option, then it will not be displayed in the resource list column [refer to the below screenshots (1) and (2)]. Please refer to the below screenshots for a better understanding:

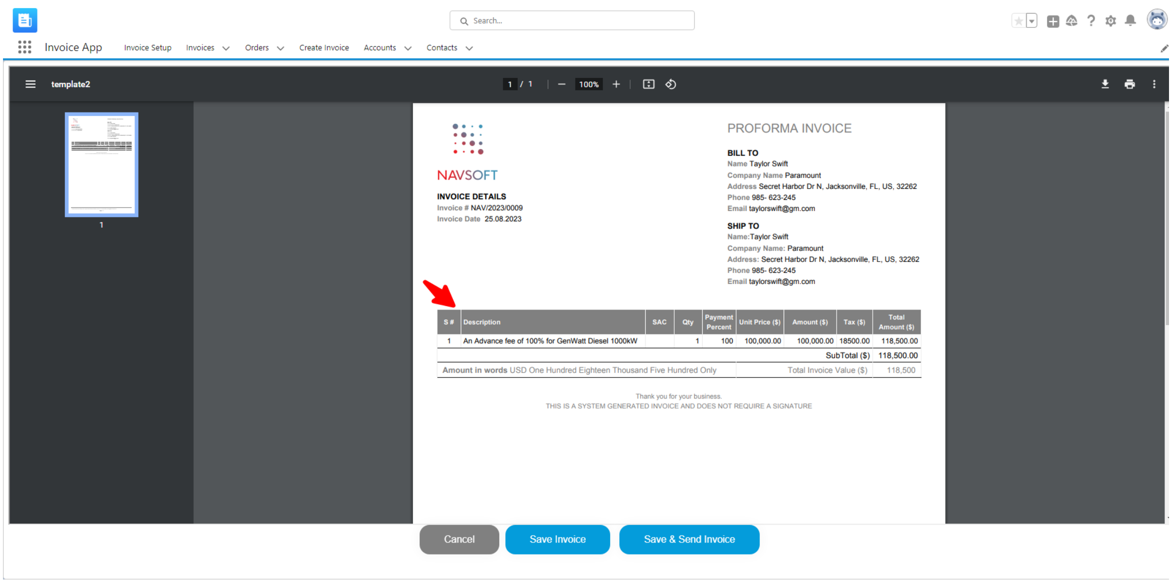


*Screenshot (1)→ [If uncheck the option **"Is Payment Milestone applicable"**]*



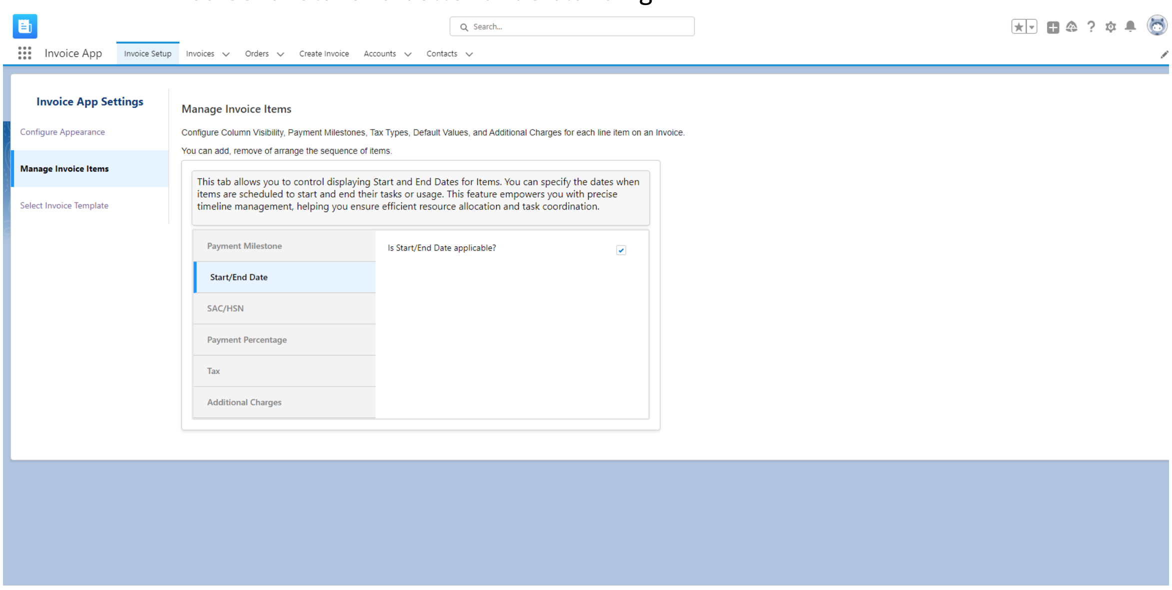
*Screenshot (2) → [Not show the **"Payment Milestone"** column with the label option]*

- Also, in the final invoice (which is generated in pdf format), the specific column is not showing [refer to the below screenshot (3)].

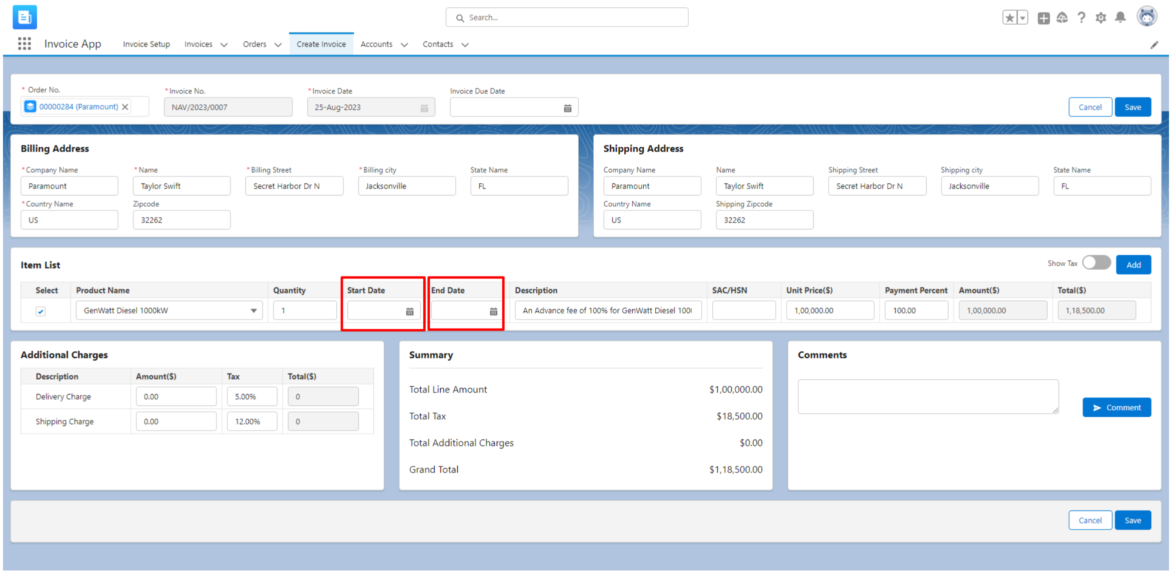


*Screenshot (3) ⟶ [In Final invoice (in pdf), it does not show the "**Payment Milestone**" column with the label.]*

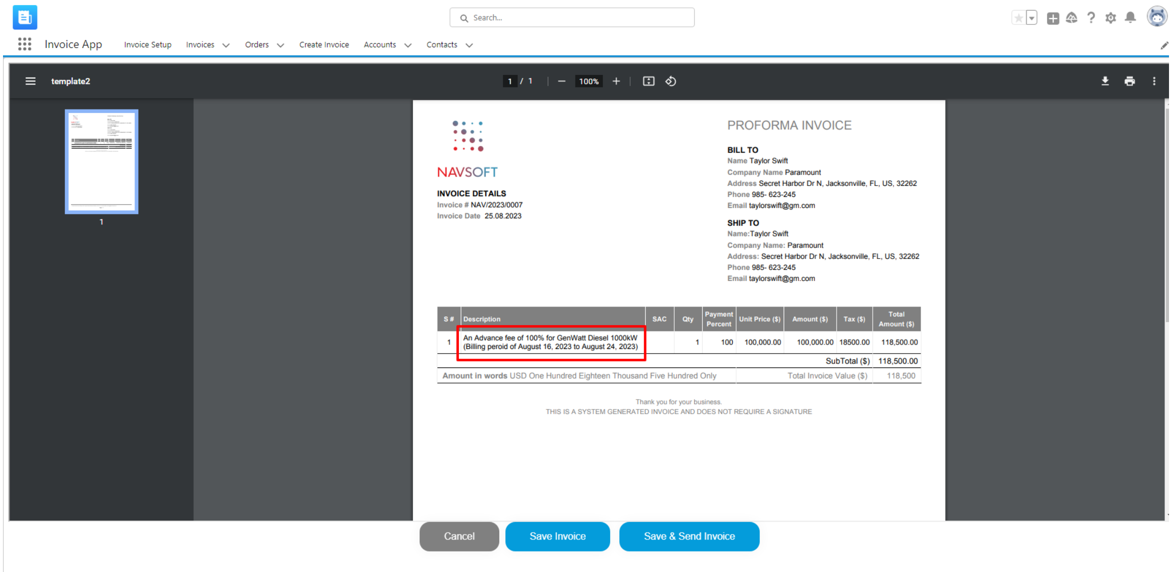
- In this "**Start/End Date**" field option, it gets the data from the order number and fetches it in this field.
    - As per the requirement, if the "**Is Start/End Date applicable?"** option is **checked** under "Manage Invoice Items" for the Invoice Setup option, then it will be displayed as a column with the respective labels in a dropdown in the resource list table section [refer to the below screenshots (1) and (2)]. As a result, in the final invoice (which is generated in pdf format), the specific column is not showing [refer to the below screenshot (3)]. Please refer to the below screenshots for a better understanding:



Screenshot (1) ⟶ [If check the option **"Is Start/End Date applicable?"***]*

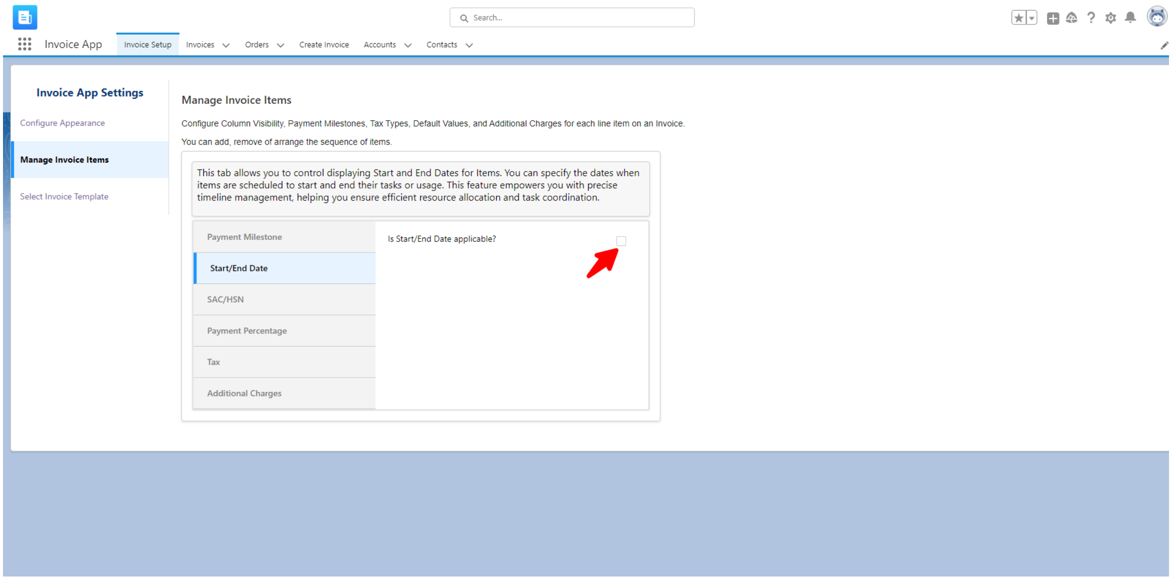


Screenshot (2) ⟶ [Show the ***"Start/End Date"*** *column with the label option in the dropdown.]*

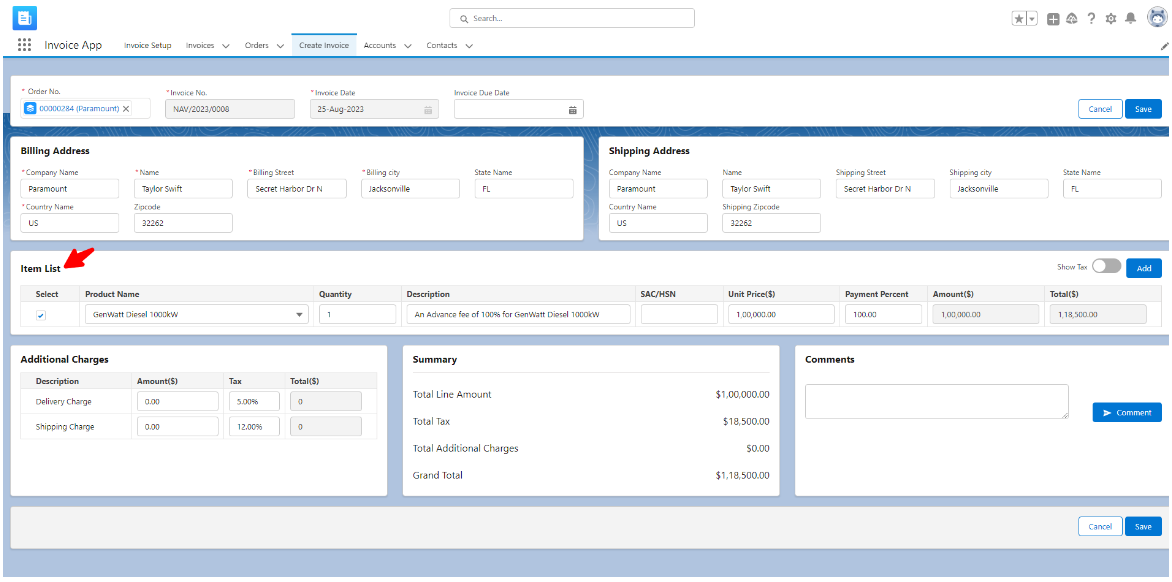


Screenshot (3) ⟶ [In Final invoice (in pdf), it shows the "Start/End Date" with the description label.]

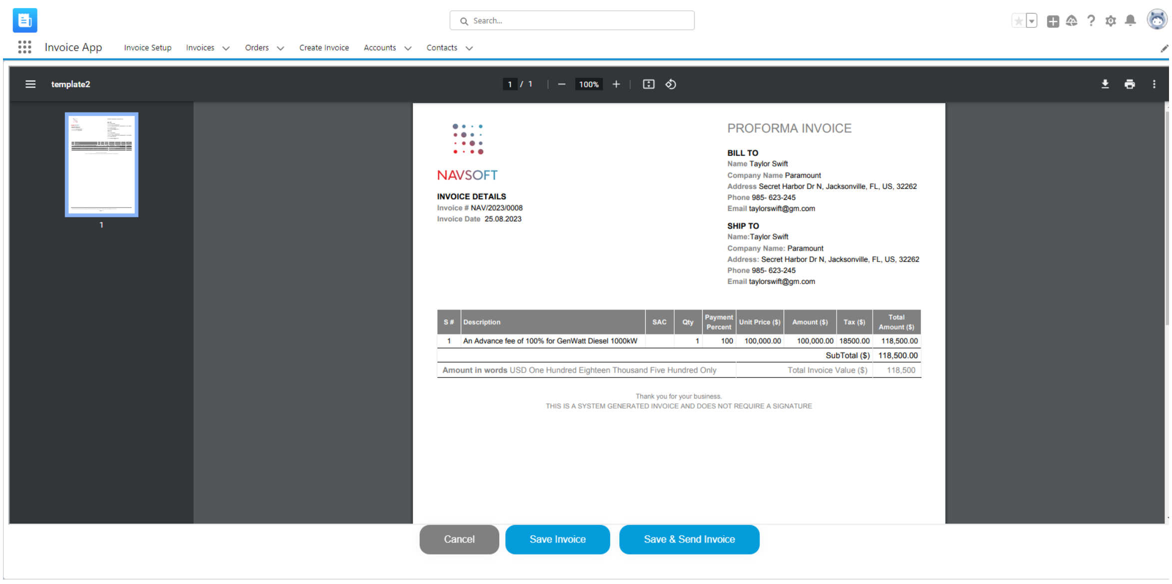
- As per the requirement, if the "**Is Start/End Date applicable?**" option is **unchecked,** then, as a result, this field is not showing in the resource list on the "Create Invoice" page and the final invoice (generated in.pdf format). Refer to the screenshots sequentially (*Screenshot (1)* , *Screenshot (2), and Screenshot (3)*) below for understanding:



Screenshot (1) → [If uncheck the option **"Is Start/End Date applicable?"**]



Screenshot (2) → [Not showing the ***"Start/End Date"*** *column with the label option in the dropdown.]*



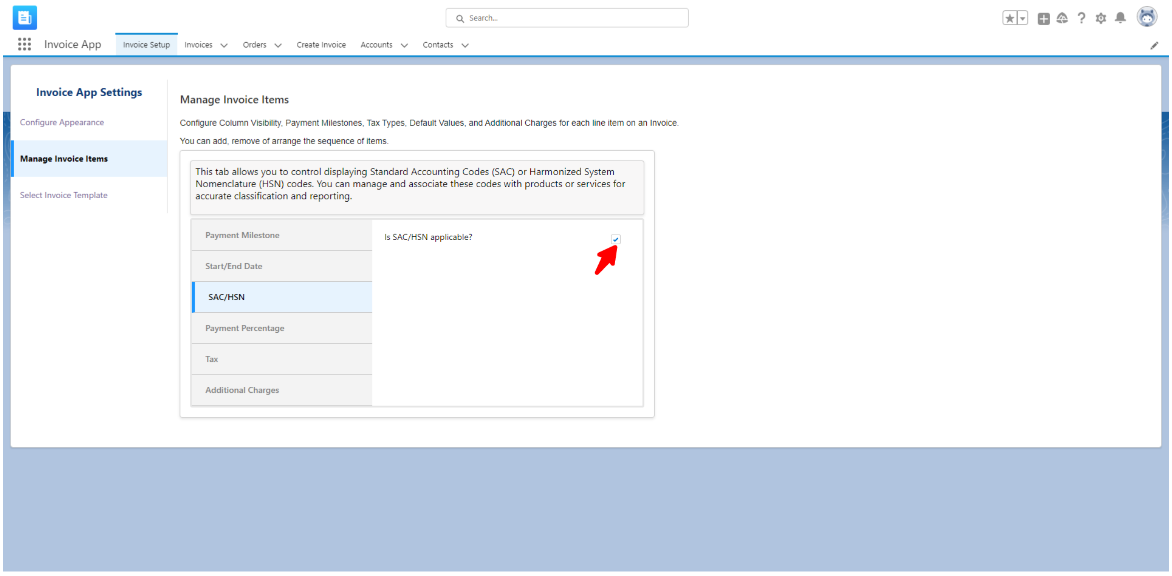
Screenshot (3) ⟶ [In Final invoice (in pdf), it doesn't show the "Start/End Date" column with the label.]

- In this "Description" field option, it doesn't show the details of start and end dates.

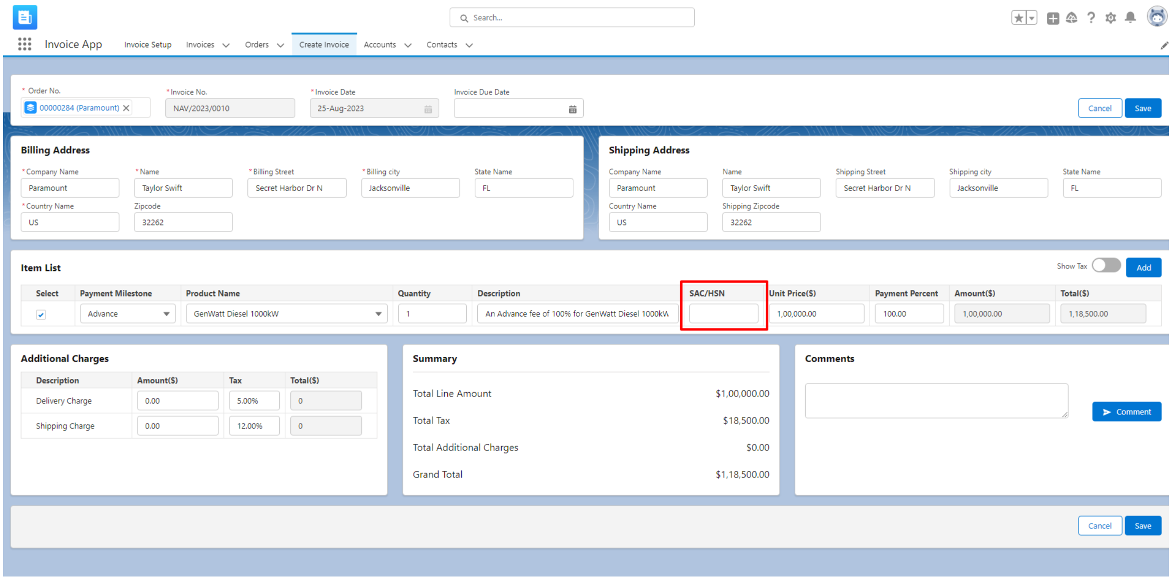
Field Name	Type	Function	Maps with the Order Tab
Product Name			Product
Quantity			Quantity
Start Date	date picker		Start Date
End Date	date picker		End Date
Unit Price			unit price of the product
Amount			amount by calculating the unit price ($) and unit of measure (%) in this field
Show tax/Hide Tax	radio button	resource list change (show or hide tax details)	
Invoice Due Date	date picker		
Comments	text box	fetched below of the product description in the final invoice (in PDF).	
Summary		get the amount details from the orders	
Total Line Amount			Total Sum of Line Amount
Total Tax			Total Sum of Tax Amount
Total Additional Charges			Total Sum of Additional Charges Amount
Grand Total			Total Line Amount + Total Tax Amount + Total Additional Charges

- o By enabling or disabling the radio button option “Show Tax” or “Hide Tax,” the tax setting option (in the invoice item) resource list will change accordingly. By clicking the “Add” button, the user can add the resource manually.
- ○ After filling out the above field option details, it saves all the details in the system, generates the invoice (in pdf format), and adds the invoice to the list view page with the record details systematically by clicking the “**Save**” button. By clicking the “**Cancel**” button, it redirects to the previous open page. At any time, as per the requirement, the authorized user can edit/change the invoice details for the specific order number in the “Invoice” tab option.

- This **SAC/HSN** tab allows the user to control the display of Standard Accounting Codes (SAC) or Harmonized System Nomenclature (HSN) codes. The user can manage and associate these codes with products or services for accurate classification and reporting. If the “**Is SAC/HSN applicable**” option is **checked** under “**Manage Invoice Items**” setup menu, then it will be displayed as a column with the respective labels as dropdowns in the resource list table section [refer to the below screenshots (1) and (2)]. Please refer to the below screenshots for better understanding:

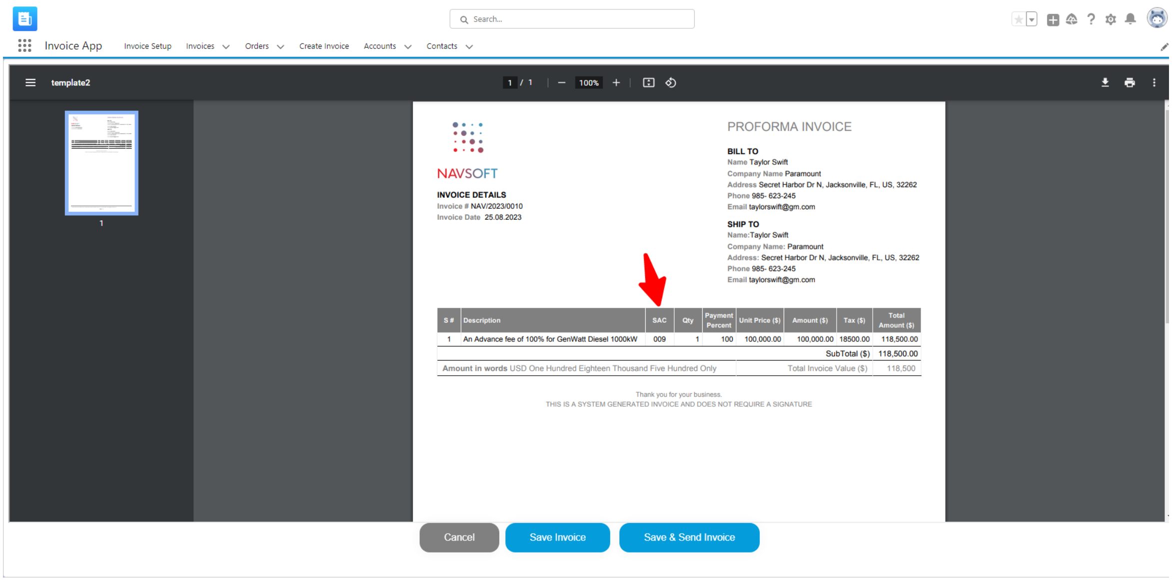


*Screenshot (1) ⟶ [If check the option **“Is SAC/HSN applicable”**]*



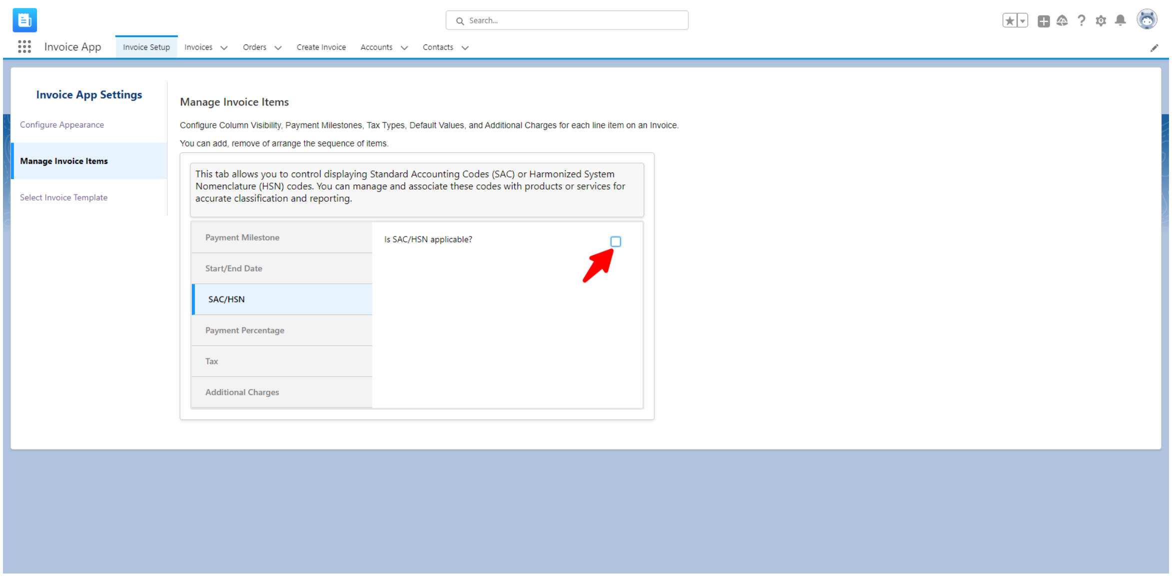
*Screenshot (2) ⟶ [Show the **"SAC/HSN"** column with the label option.]*

- But in the final invoice (which is generated in pdf format), then in the description column [refer to the below screenshot (3)].

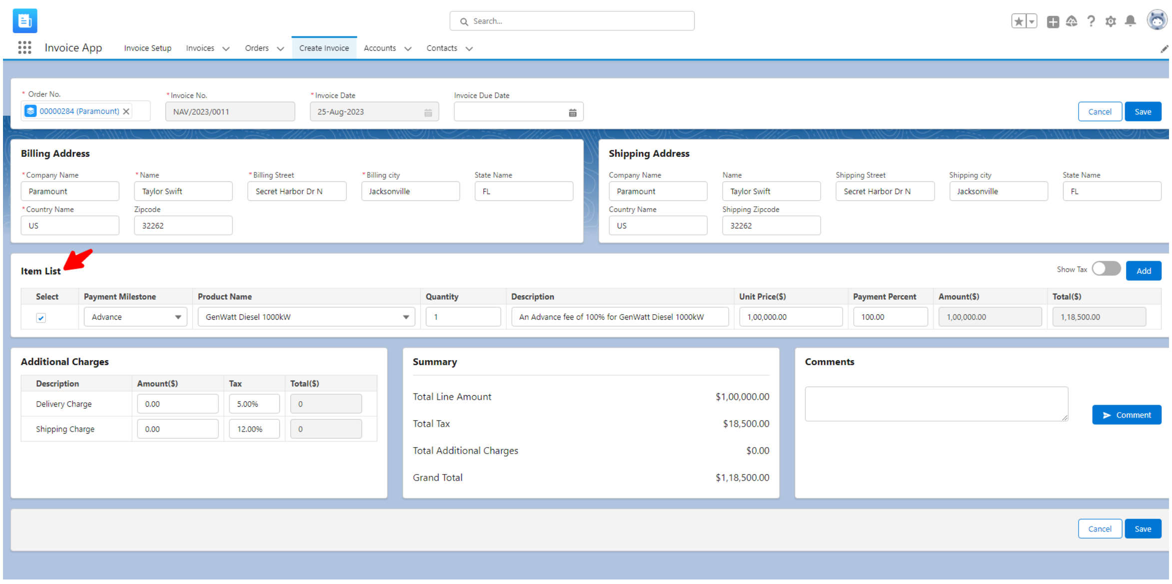


Screenshot (3) ⟶ [In Final invoice (in pdf), "SAC/HSN" column.]

- As per the requirement, if the "**Is SAC/HSN applicable**" option is **unchecked** under "**Manage Invoice Items**" for the Invoice App Setting option, then it will not be displayed in the resource list column at the time of creating the invoice [refer to the below screenshots (1) and (2)]. Please refer to the below screenshots for a better understanding:

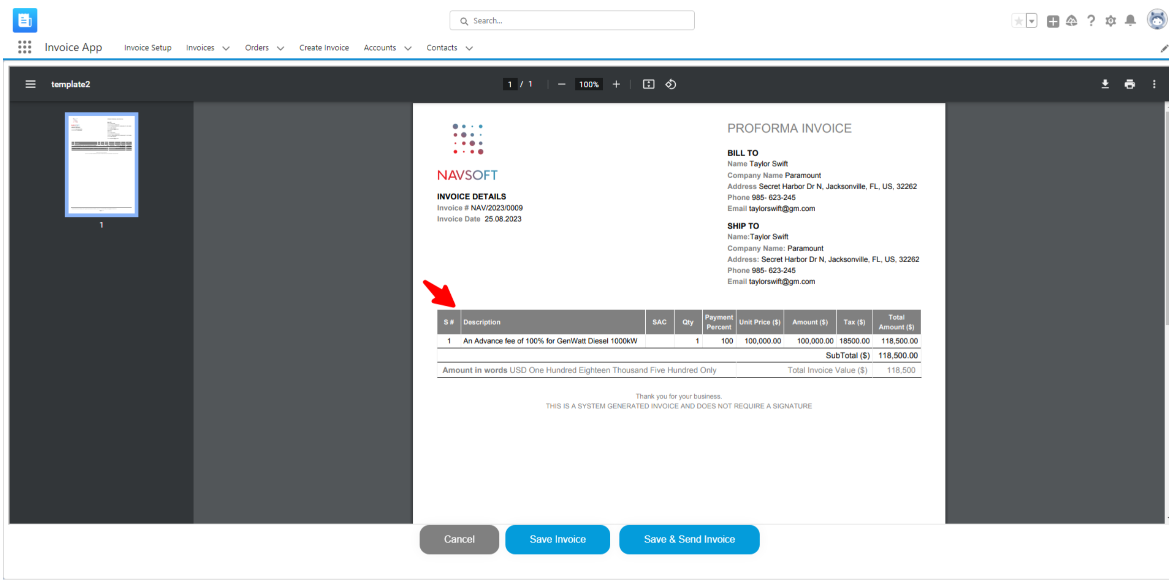


*Screenshot (1)→ [If uncheck the option **"Is SAC/HSN applicable"**]*



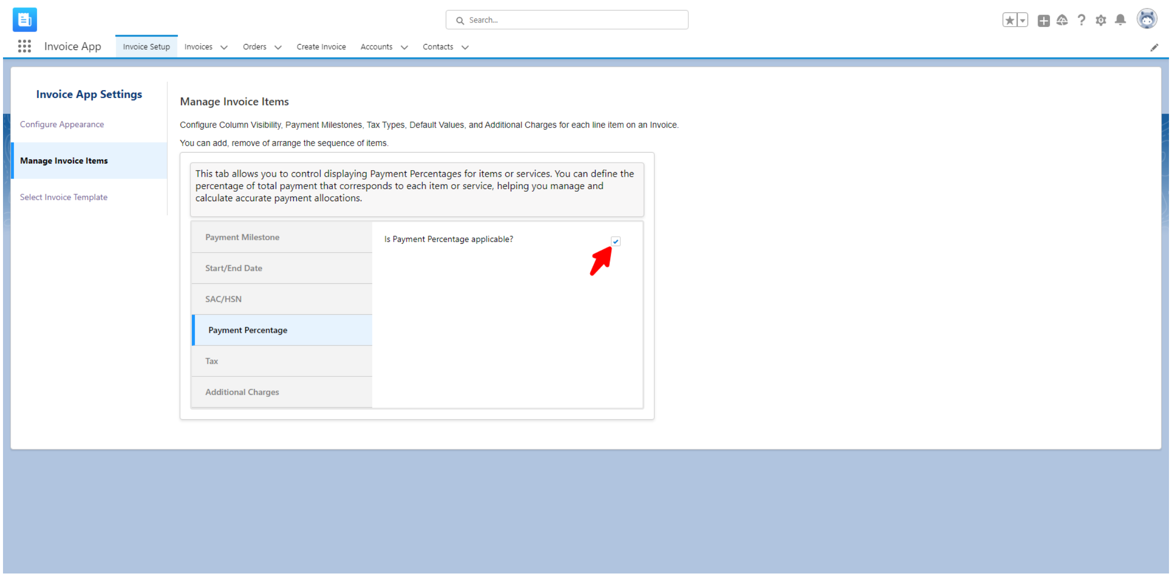
*Screenshot (2) → [Not show the **"SAC/HSN"** column in item list.]*

- As a result, in the final invoice (which is generated in pdf format), the specific column is not showing [refer to the below screenshot (3)].

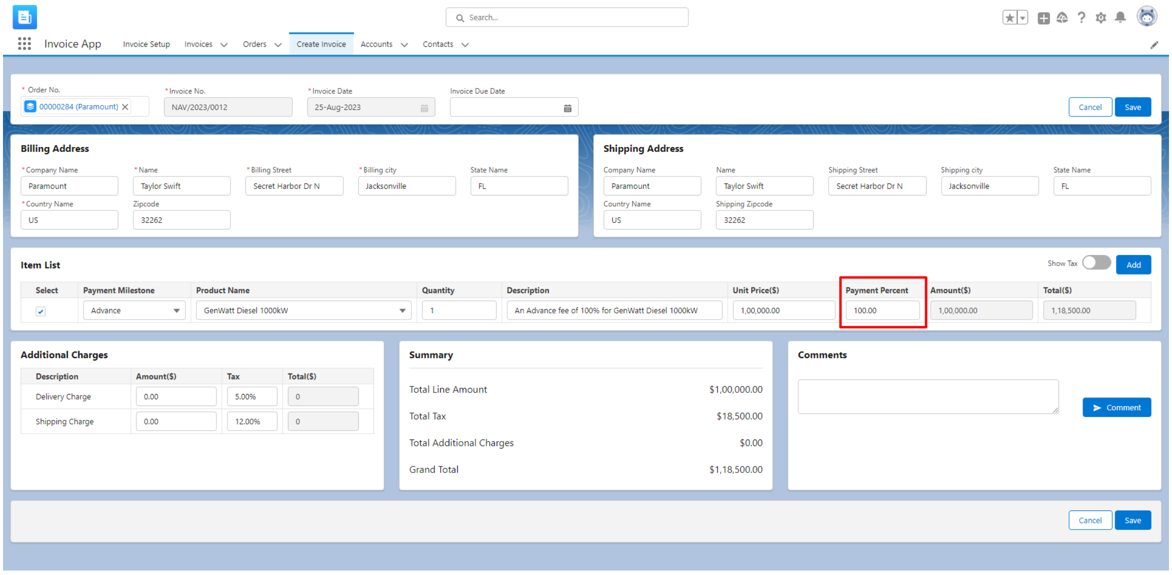


*Screenshot (3) → [In Final invoice (in pdf), it does not show the "**SAC/HSN**" column.]*

- This "Payment Percentage" tab allows the user to control the display of payment percentages for items or services. The user can define the percentage of total payment that corresponds to each item or service, helping you manage and calculate accurate payment allocations. If the "**Is Payment Percentage applicable**" option is **check** under the "**Manage Invoice Items**" setup menu, then it will be displayed as a column with the respective labels as dropdowns in the resource list table section [refer to the below screenshots (1) and (2)]. Please refer to the below screenshots for better understanding:

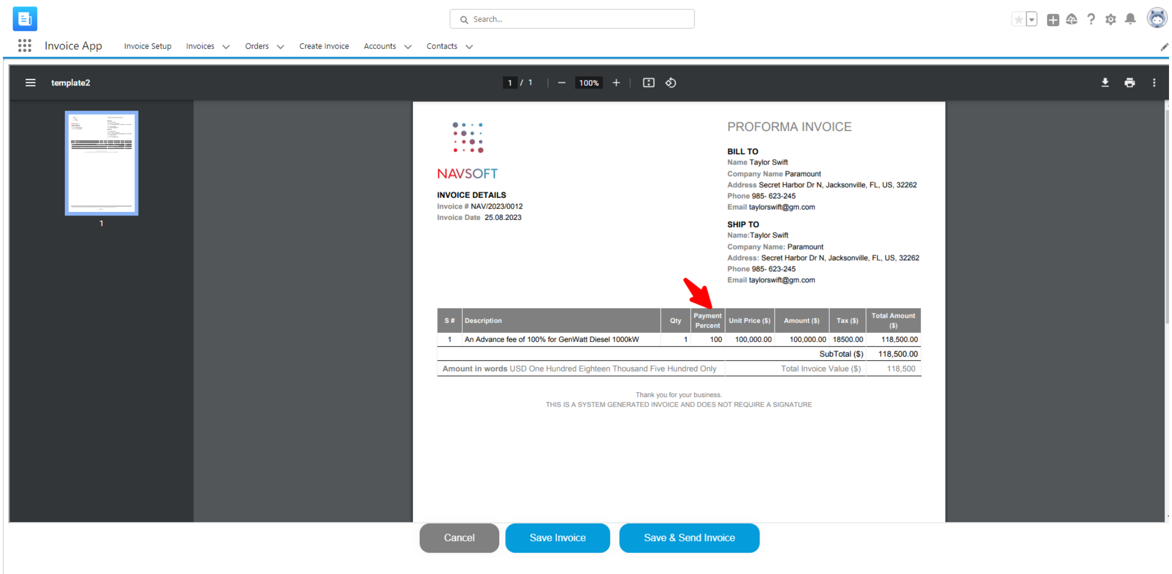


*Screenshot (1) → [If check the option **"Is Payment Percentage applicable"**]*



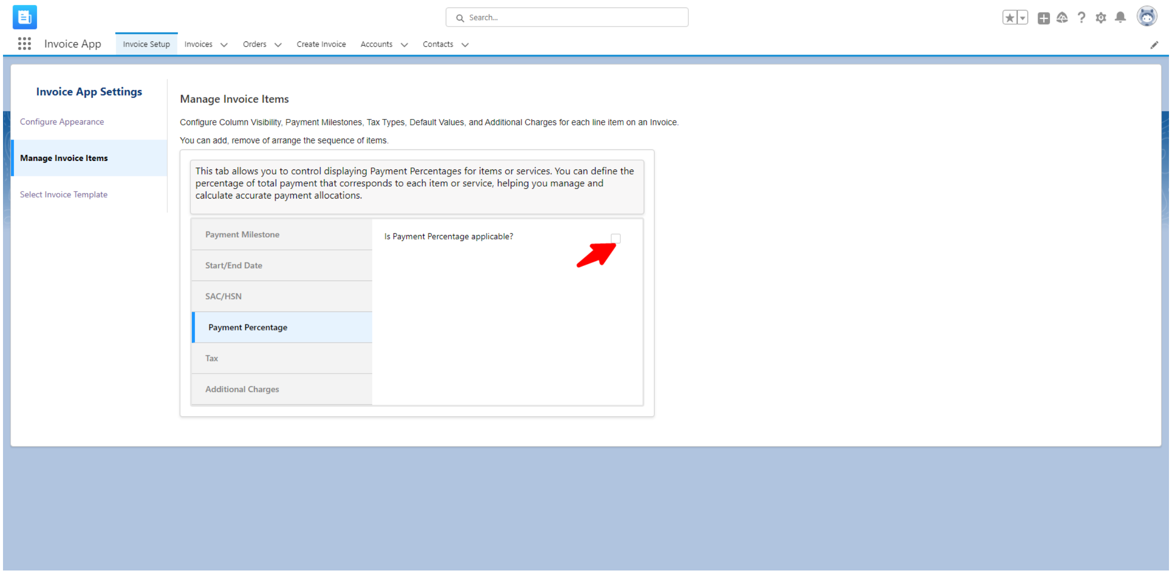
*Screenshot (2) ⟶ [Show the **"Payment Percentage"** column with the label option.]*

- As a result, in the final invoice (which is generated in pdf format), it shows the payment percentage details in the description column [refer to the below screenshot (3)].

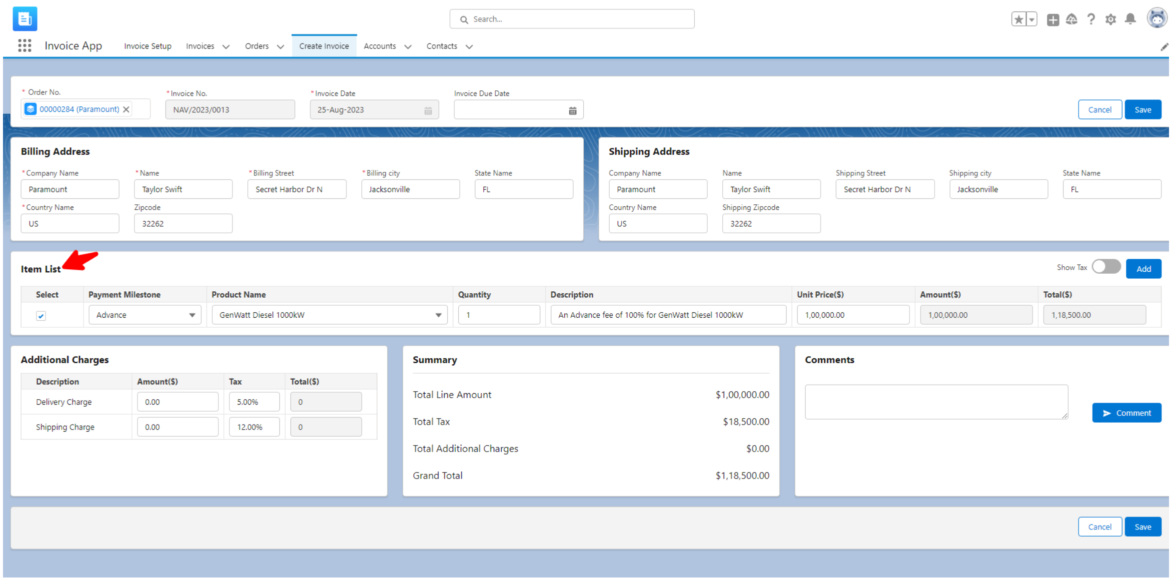


Screenshot (3) ⟶ [In Final invoice (in pdf), "Payment Percentage" column.]

- As per the requirement, if the "Is Payment Percentage applicable" option is **unchecked** under "**Manage Invoice Items**" for the Invoice App Setting option, then it will not be displayed in the resource list column at the time of creating the invoice [refer to the below screenshots (1) and (2)]. Please refer to the below screenshots for a better understanding:

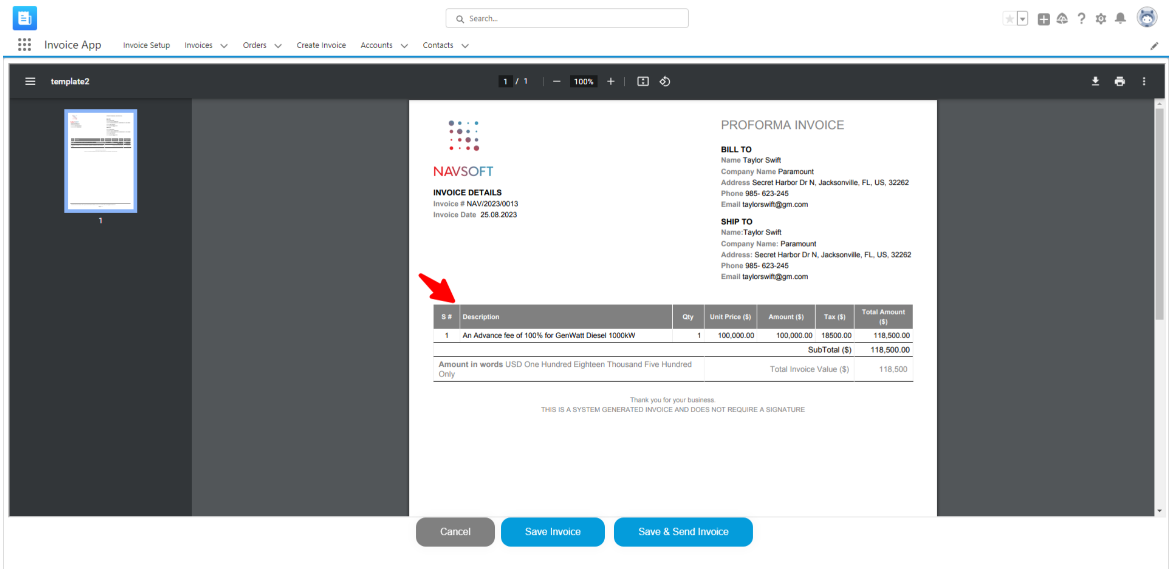


*Screenshot (1)⟶ [If uncheck the option **"Is Payment Percentage applicable"**]*



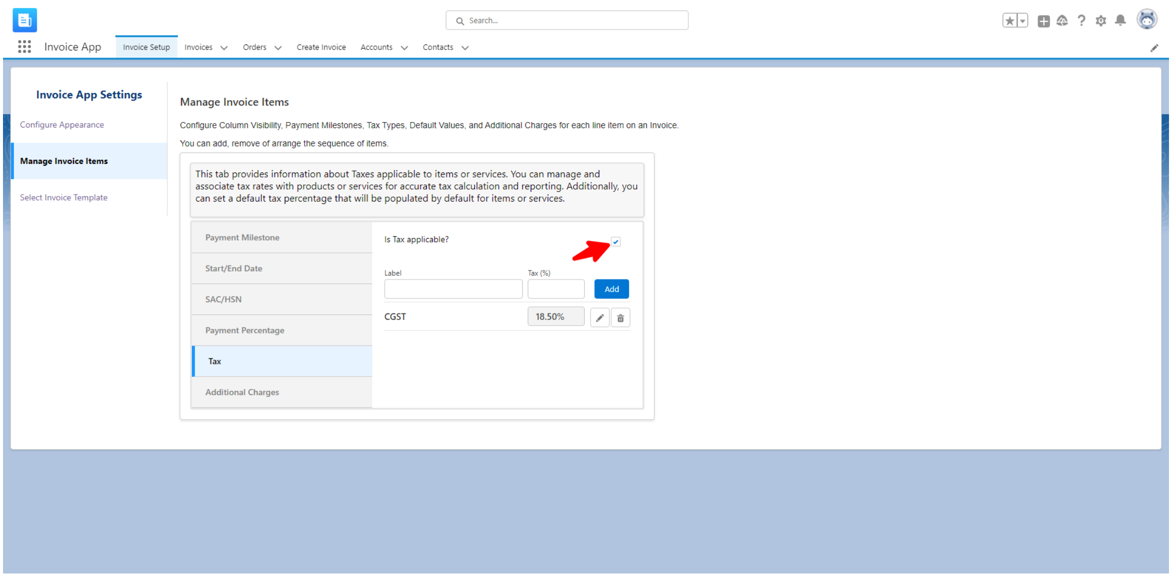
*Screenshot (2) ⟶ [Not show the **"Payment Percentage"** column in item list.]*

- As a result, in the final invoice (which is generated in pdf format), the specific column is not showing [refer to the below screenshot (3)].

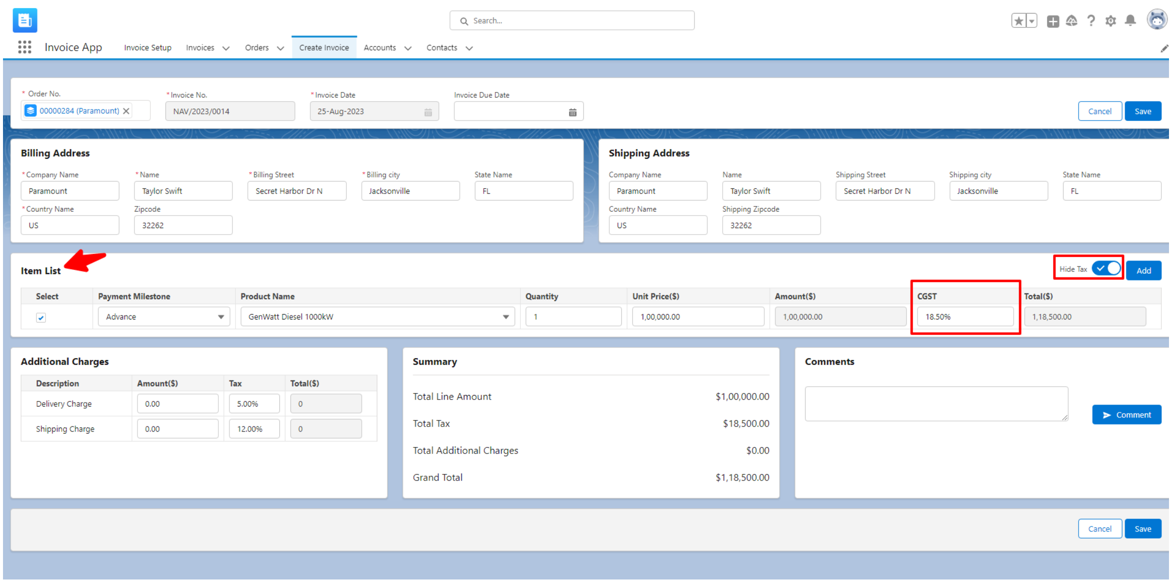


*Screenshot (3) → [In Final invoice (in pdf), it does not show the "**Payment Percentage**" column.]*

- This "Tax" tab provides information about Taxes applicable to items or services. The user can manage and associate tax rates with products or services for accurate tax calculation and reporting. Additionally, the user can set a default tax percentage that will be populated by default for items or services. If the "**Is Tax applicable**" option is **check** under the "**Manage Invoice Items**" setup menu, then it will be displayed as a column with the respective labels as dropdowns in the resource list table section [refer to the below screenshots (1) and (2)]. Please refer to the below screenshots for better understanding:

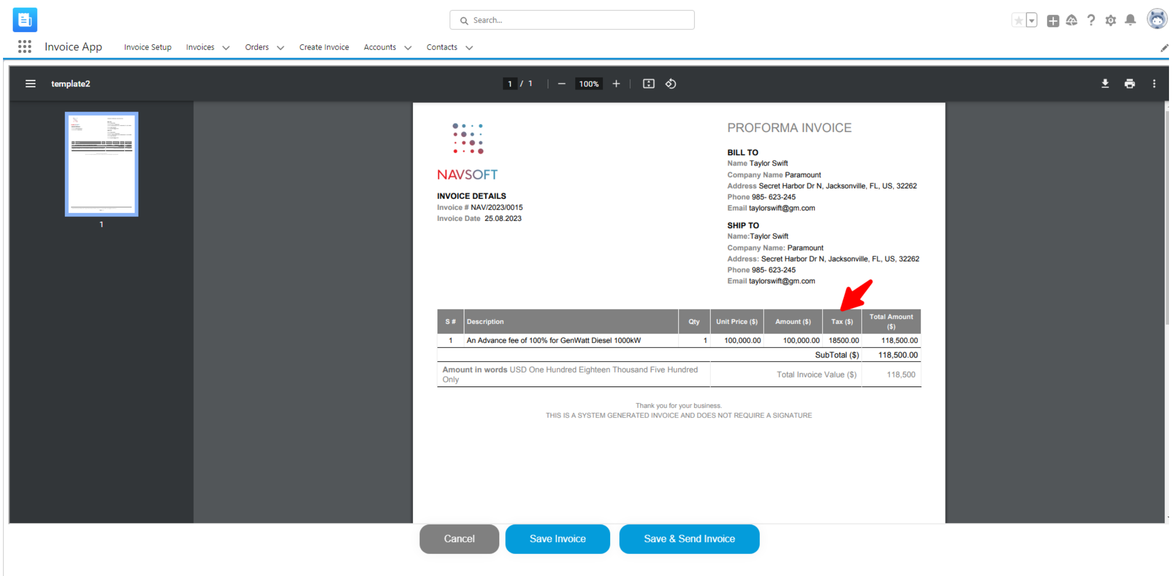


*Screenshot (1) → [If check the option **"Is Tax applicable"**]*



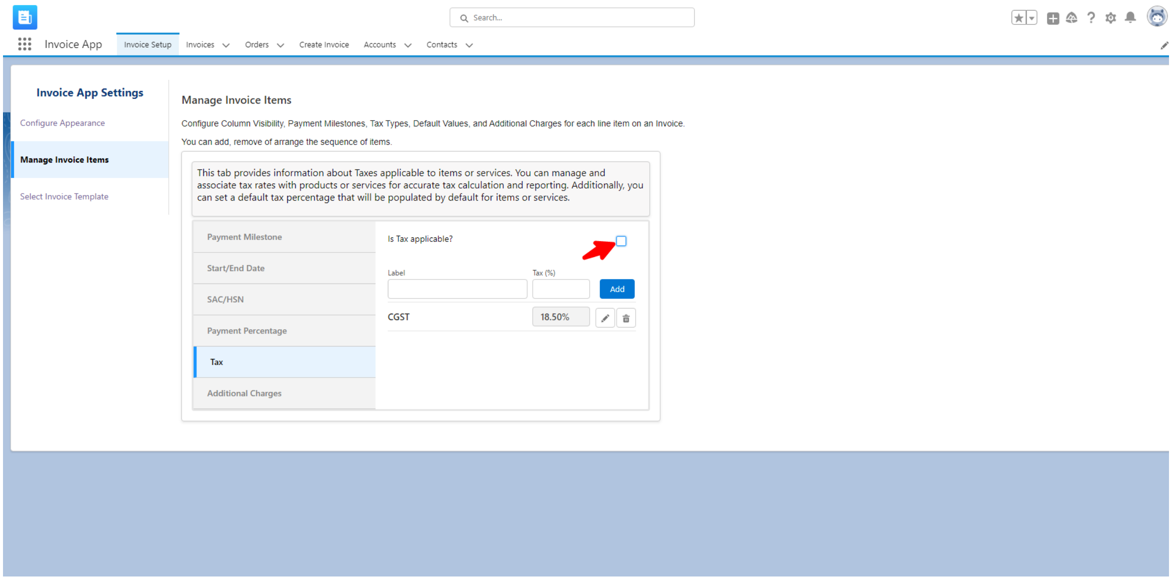
*Screenshot (2) ⟶ [Show the "**Tax**" column with the label option.]*

- As a result, in the final invoice (which is generated in pdf format), then in the description column [refer to the below screenshot (3)].

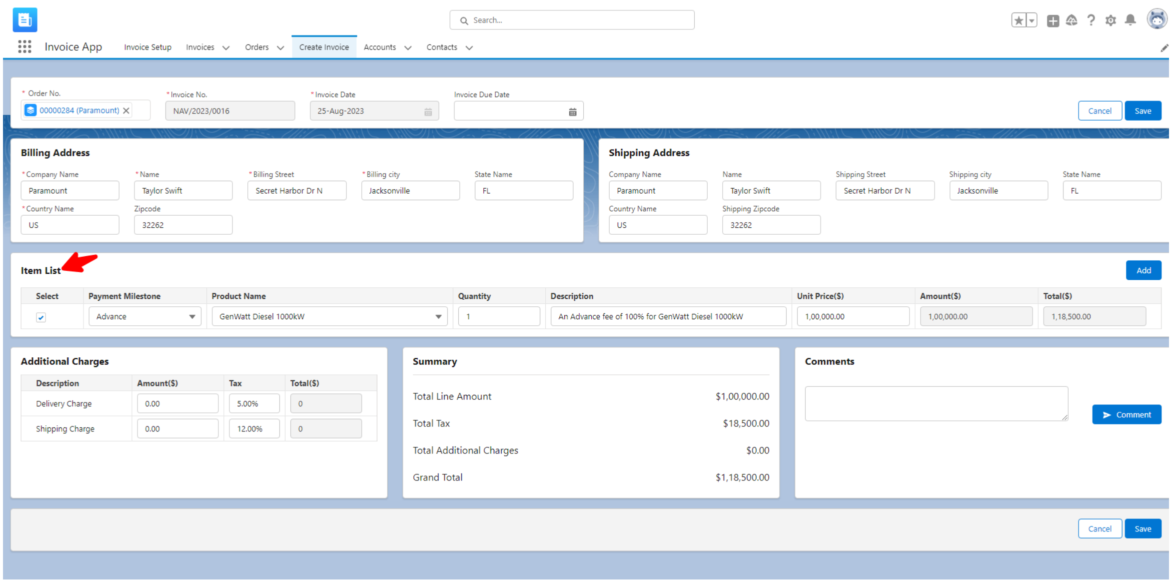


*Screenshot (3) ⟶ [In Final invoice (in pdf), "**Tax**" column.]*

- As per the requirement, if the "Is Tax applicable" option is **unchecked** under "**Manage Invoice Items**" for the Invoice App Setting option, then it will not be displayed in the resource list column at the time of creating the invoice [refer to the below screenshots (1) and (2)]. Please refer to the below screenshots for a better understanding:

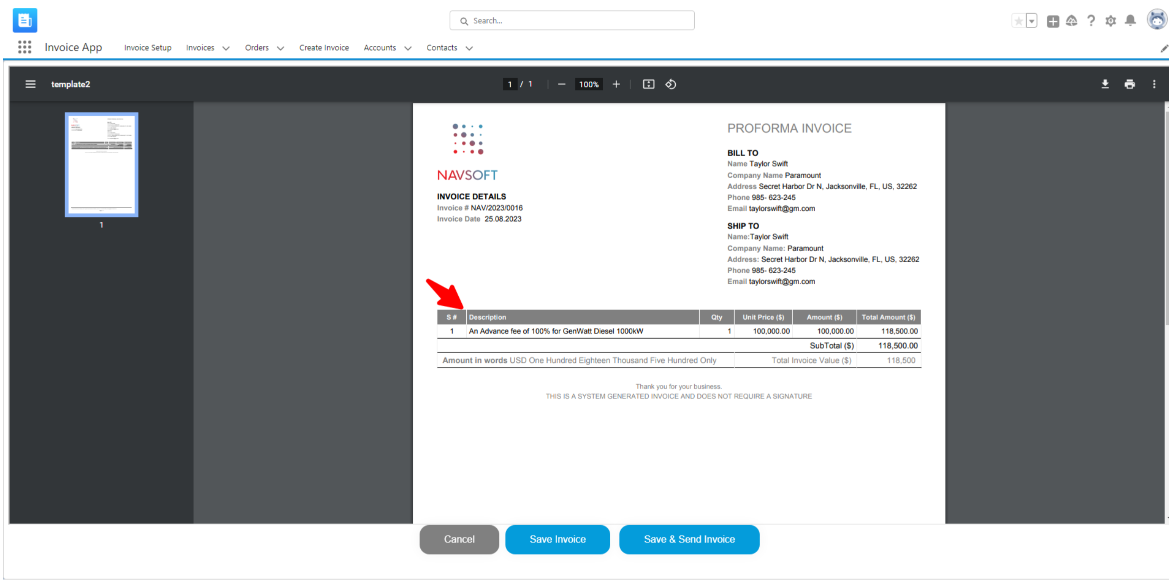


*Screenshot (1)⟶ [If uncheck the option **"Is Tax applicable"**]*



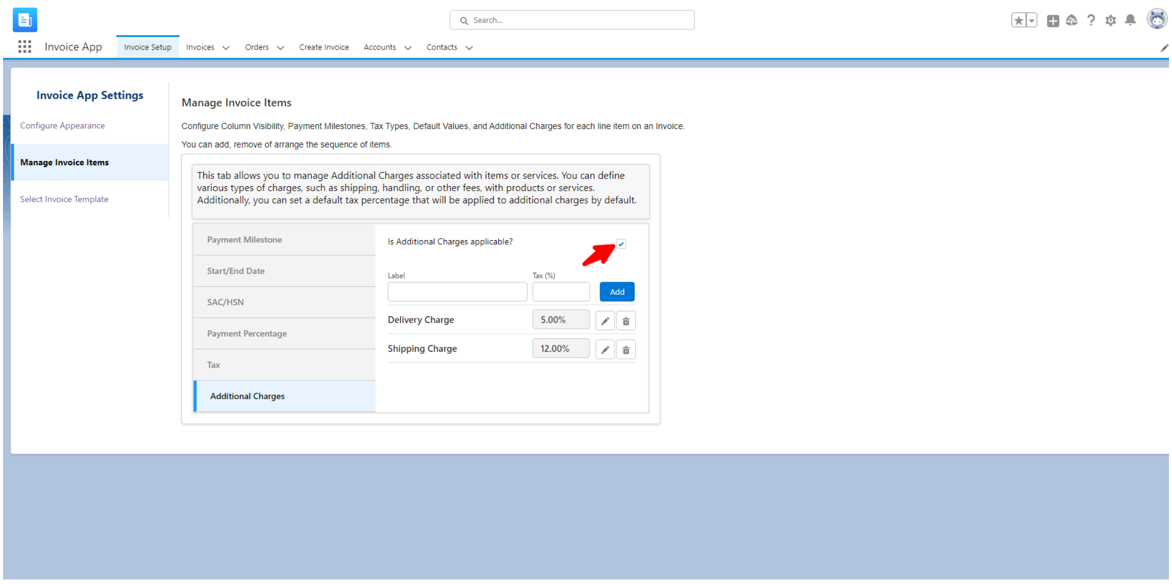
*Screenshot (2) ⟶ [Not show the **"Tax"** column in item list.]*

- Also, in the final invoice (which is generated in pdf format), the specific column is not showing [refer to the below screenshot (3)].

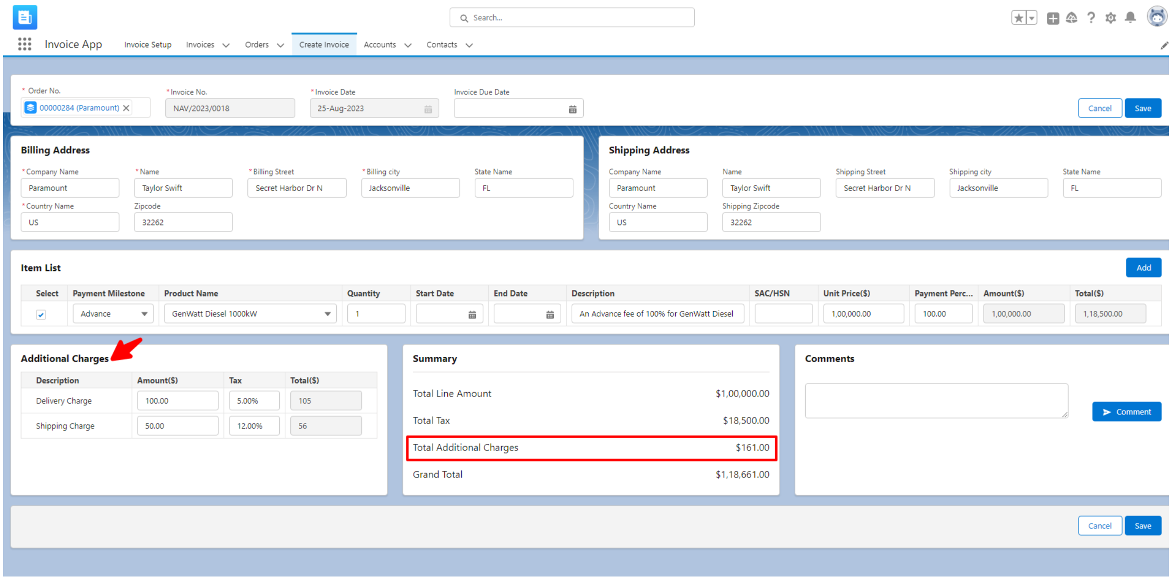


*Screenshot (3) ⟶ [In Final invoice (in pdf), it does not show the "**Tax**" column.]*

- This "Additional Charges" tab allows the user to manage Additional Charges associated with items or services. The user can define various types of charges, such as shipping, handling, or other fees, with products or services. Additionally, the user can set a default tax percentage that will be applied to additional charges by default. If the "**Is Additional Charges applicable**" option is **check** under the "**Manage Invoice Items**" setup menu, then it will be displayed as a column with the respective labels as dropdowns in the resource list table section [refer to the below screenshots (1) and (2)]. Please refer to the below screenshots for better understanding:

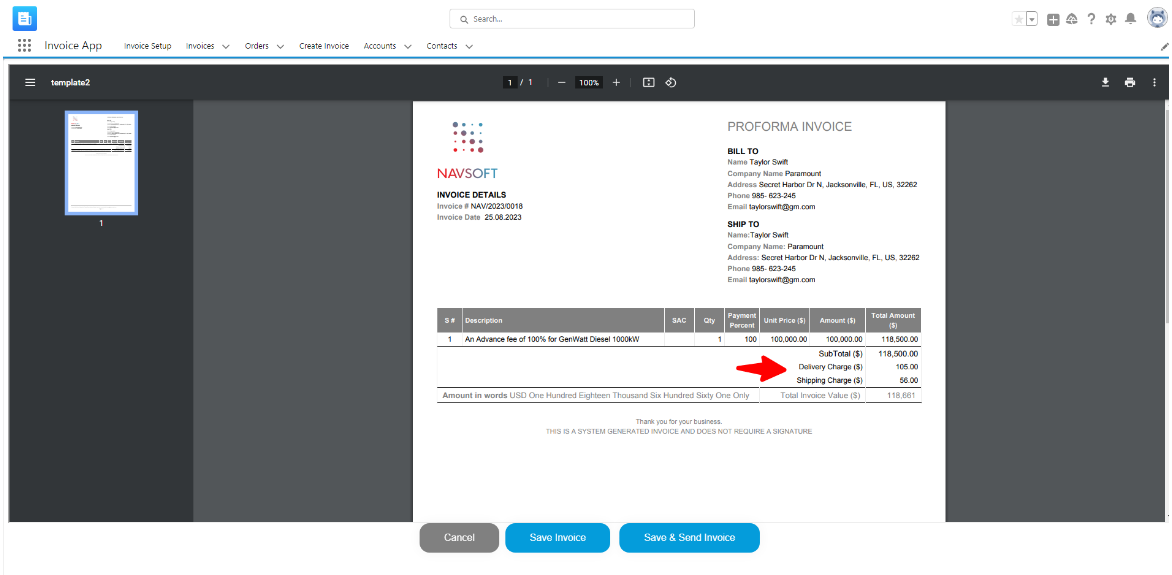


*Screenshot (1) ⟶ [If check the option **"Is Additional Charges applicable"**]*



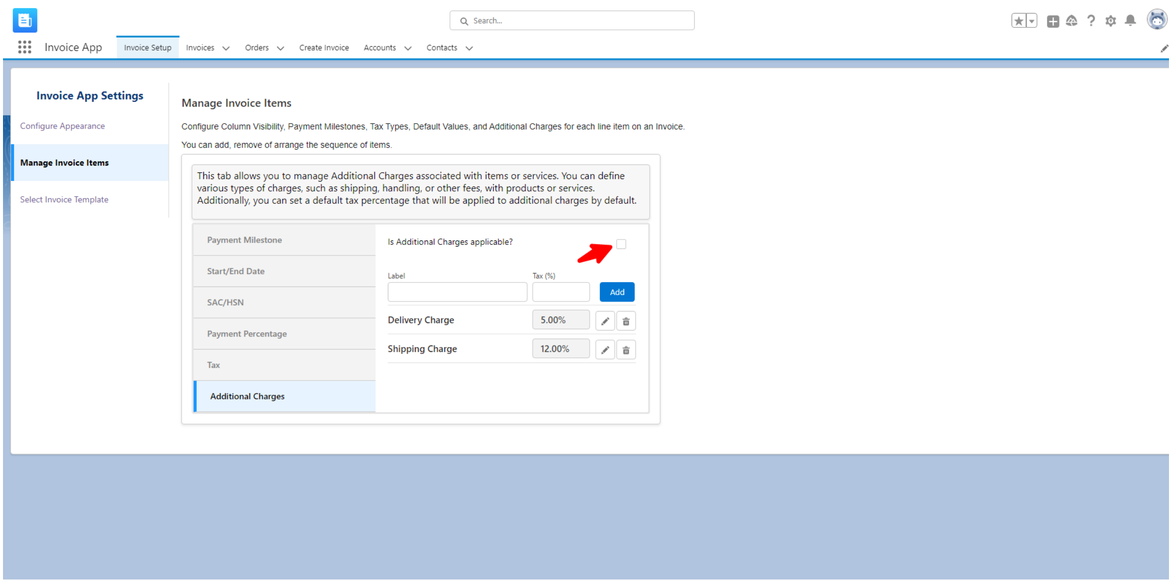
*Screenshot (2) ⟶ [Show the **"Additional Charges"** column with the label option.]*

- As a result, in the final invoice (which is generated in pdf format), then in the description column [refer to the below screenshot (3)].

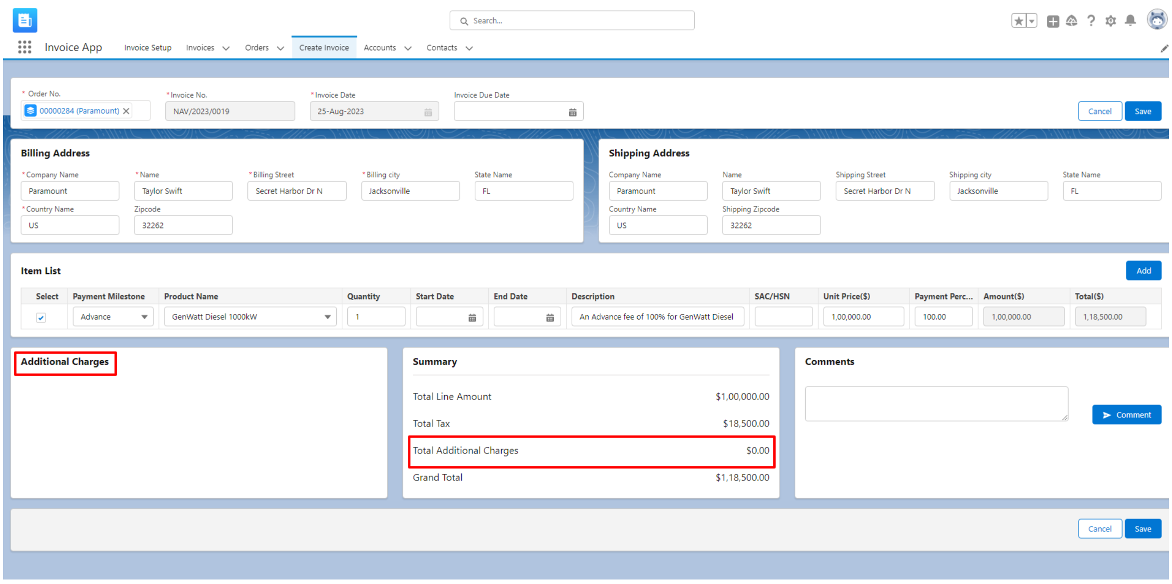


Screenshot (3) ⟶ [In Final invoice (in pdf), Additional Charges details.]

- As per the requirement, if the "Is Additional Charges applicable" option is **unchecked** under "**Manage Invoice Items**" for the Invoice App Setting option, then it will not be displayed in the resource list column at the time of creating the invoice [refer to the below screenshots (1) and (2)]. Please refer to the below screenshots for a better understanding:

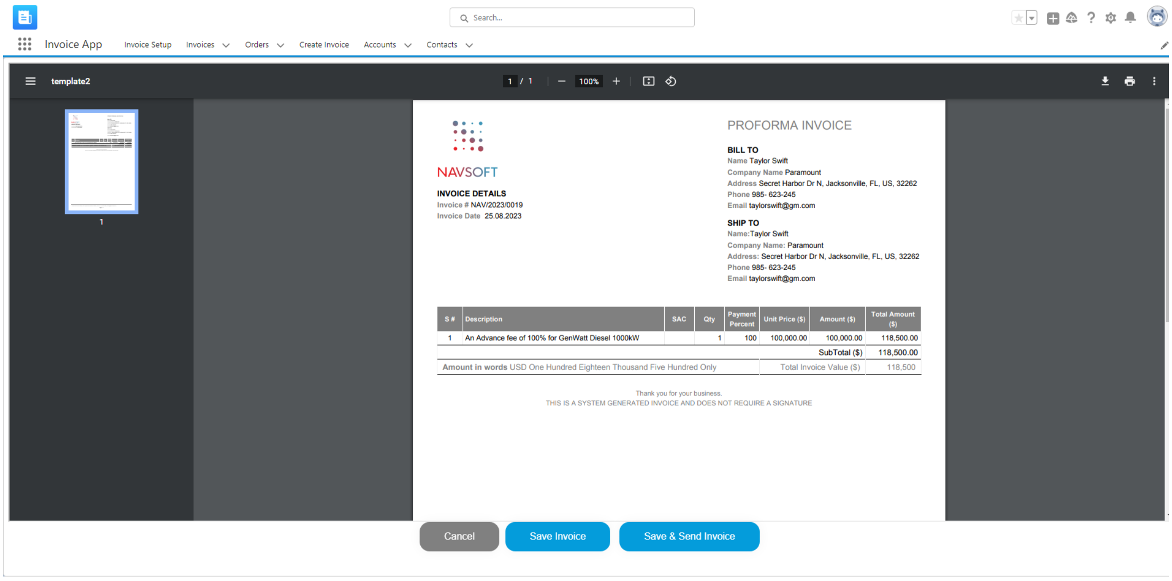


*Screenshot (1)⟶ [If uncheck the option **"Is Additional Charges applicable"**]*



*Screenshot (2) ⟶ [Not show the **"Additional Charges"** details.]*

- As a result, in the final invoice (which is generated in pdf format), the specific column is not showing [refer to the below screenshot (3)].



*Screenshot (3) → [In Final invoice (in pdf), it does not show the "**Additional Charges**" details.]*

– END –