Invoices

Creating dispatch invoices against purchase orders, draft and final invoice numbers, and marking an invoice as complete.

- Creating an invoice
- Viewing an invoice
- Changing an invoice
- Completing an invoice
- Marking an invoice as delivered
- The change history
- Finding invoices

Creating an invoice

TL;DR

> This page covers raising an invoice from one or more purchase orders: every field, how orders are brought in, and how tax is worked out. The company's and customer's details are copied onto the invoice as it is created, so correct them before you raise it, not after.

What this is for

An invoice turns one or more purchase orders into a shipment. It carries the goods, the prices, the ports, and the tax. Everything after it hangs off the invoice: packing, pallets, and the documents that travel with the goods.

An invoice starts as a draft. It carries a temporary number and can be changed freely. It becomes final only when you complete it. See Completing an invoice.

Before you start

- The **company** must be set up and switched on. Only companies that are switched on can be chosen.
- The **customer** must be set up under that company. Customers that are switched off still appear in the list here.
- The customer must have at least one purchase order in **Pending**, **In Progress** or **Partially Dispatch**, with quantity still outstanding on at least one line.
- The purchase order's currency must match the customer's currency.
- If the goods go to a dispatch location rather than the customer's own address, the purchase order must already name that same location.

Creating an invoice

1. Open **Invoice** in the top menu.

2. Select **Add new invoice**. The "Add Invoice" page opens.
3. Fill in the header fields, described below.
4. Choose the purchase orders and set the dispatch quantities.
5. Select **Save**.

You return to the list and see "Invoice has been created successfully!".

> **IMAGE PLACEHOLDER: creating-an-invoice-form-01** · annotated screenshot · status: pending
>
> **Shows:** the "Add Invoice" screen with its two parts: the header fields above, the purchase-order lines below
>
> **Must include:** the header boxes in screen order (Invoice Date, Company, Customer, Currency, Exchange Rate, Dispatch Details, Port of Loading, Port of Discharge, Transport Mode, Declaration, Allow Pallet, Terms of Delivery & Payment); the item table beneath with its columns; the totals row at the foot; a marker showing that Company, Customer, Currency and Dispatch Details can never be changed after the first save
>
> **Must not show:** any real customer, company, order number or price
>
> **Alt text (draft):** The Add Invoice screen has two parts. Header fields at the top set the company, customer, currency, ports, transport mode and pallet answer. A table below holds one row per purchase order line, with the dispatch quantity and rate for each. Company, customer, currency and dispatch location are fixed once the invoice is first saved.

The header fields

Field	Rules	Notes
Invoice Date	Required.	The date window is described below.
Company	Required.	Only companies that are switched on appear. **Fixed after the first save.**
Customer	Required.	Only customers belonging to the chosen company appear, switched on or not. **Fixed after the first save.**
Currency	Required.	Filled in from the customer and cannot be changed. **Fixed after the first save.**
Exchange Rate	Optional. A number, no less than 0.	Read below before entering 0.

Field	Rules	Notes
Dispatch Details	Optional.	The customer's delivery location, if the goods do not go to the customer's own address. **Fixed after the first save.**
Port of Loading	Required for export invoices only.	See below.
Port of Discharge	Required for export invoices only.	See below.
Transport Mode	Required for export invoices only. **Shipment** or **By Air**.	Decides what pallet work completion needs, and whether the ports apply. One of the few boxes that can still be corrected after completion; see Changing an invoice.
Declaration	Required.	The company's own wording, chosen from the declarations set up against it.
Allow Pallet	Required. **Yes** or **No**.	No default, so you must choose. Changing this to No later destroys pallet work; see Changing an invoice.
Terms of Delivery & Payment	Optional. Up to 5,000 characters.	Free text. Prints on the commercial invoice.

When the ports and transport mode are required

The rule is the destination country, not the customer's type.

Export ERP compares the **company's** country with the destination country. The destination is the dispatch location's country if you chose a dispatch location, and the customer's country otherwise.

- **The two countries differ**: an export. **Port of Loading**, **Port of Discharge** and **Transport Mode** are all required.
- **The two countries match**: a domestic invoice. All three boxes are switched off on screen, emptied, and lose their required marker. Anything already in them is cleared when you save.

The boxes react as soon as you change the company, the customer or the dispatch location. A box that was required a moment ago can empty itself in front of you.

What the Exchange Rate does

The exchange rate converts the invoice's currency into the company's own currency, for tax. The note beside the box shows the direction, as "(CUSTOMER CURRENCY to COMPANY CURRENCY)".

Leave it empty when it does not apply. An empty box is treated as a rate of 1, and nothing on the documents changes.

Do not enter 0 to mean "not applicable". Zero is accepted, and it does not zero your amounts. The screen treats 0 as 1 while working out the taxable amount, so the figures look right. But the 0 is stored. The tax invoice shows its converted-amount columns whenever the rate is anything other than 1. A rate of 0 therefore makes those columns appear, filled with figures worked out at a rate of 1. The document shows a conversion that did not happen.

If the two currencies are the same, the box fills itself with 1.

The date window

Invoice Date must fall between today and the first day of the month three months ahead. A date outside that range is refused with "Date must be after or equal to" or "Date must be before or equal to", followed by the boundary date in day-month-year form.

Your installation can be set to accept any date. Where that has been done, no window applies. If dates outside the window are accepted for you, that is why.

Bringing in purchase orders

Choose the company and customer first. The purchase order list then offers only orders that pass every one of these:

- They belong to that company **and** that customer.
- Their status is **Pending**, **In Progress** or **Partially Dispatch**. Complete and Delete orders never appear.
- At least one line still has quantity outstanding.
- Their dispatch location matches the invoice's. If you chose a dispatch location, only orders naming that same location appear. If you chose none, only orders with no dispatch location appear.

An order that seems to be missing has failed one of these. The dispatch-location rule is the one people miss.

Every order on one invoice must share the **customer's currency**. If any does not, the save is refused and the message names the offending orders: "The following Purchase Order(s) have a different currency than the invoice currency: " followed by the order numbers.

The dispatch location is checked again on save. If an order's location no longer matches the invoice's, the save is refused with "The following selected Purchase Order(s) do not match the selected invoice dispatch details: " followed by the order numbers.

Choosing orders brings in every line that still has quantity outstanding. Lines already fully dispatched are left behind.

Dispatch quantities

Each line arrives with **Dispatch Qty** already filled in with the amount still outstanding on that line. You can lower it, invoice part of the order now, and invoice the rest later on another invoice.

Remaining Qty on the row shows what was outstanding before this invoice.

The outstanding amount is the line's ordered quantity minus everything already dispatched on other invoices. Export ERP works it out again at the moment you save, so a colleague invoicing the same order while you were typing will change it.

Going above the outstanding amount is refused with "Exceeds available qty (12.000).", unless over-dispatching is allowed. Your own figure will differ.

That permission comes from the **purchase order**, not from the customer. The order took a copy of the customer's **Allowed Extra Quantity** answer when the order was created. Changing the customer's answer afterwards does not reach orders already raised, and the invoice reads the order's copy. To change it for an order, revise the order. See The over-ordering setting.

Rates, amounts and totals

Each line carries a **Rate** you can change, and an **Amount** worked out as dispatch quantity times rate. You cannot type into Amount.

Additional Charges is the one figure under the table you can type into. It starts at 0.0000 and cannot be negative.

Everything else under the table is worked out for you: **Total Amount**, **Taxable Amount**, **Total Taxable Amount** and **Final Amount**. **Final Amount** is Total Amount plus Additional Charges.

Taxes

Which taxes apply is decided by where the company and the customer are, not by anything you choose:

- **The company is not in India**: no tax is worked out at all.
- The company is in India, the customer is **abroad**: IGST applies if the company is set up to export with payment of IGST, and no tax applies otherwise.
- **Both are in India, in the same state**: CGST and SGST apply, each half the product's GST percentage.
- **Both are in India, in different states**: IGST applies.

Each line's tax comes from its product's GST percentage, worked out on the line's converted amount.

Taxes are worked out **when you save the invoice**, not when you complete it. See Completing an invoice for why that matters.

Errors you may see

What happened	What you see
No date chosen	"Please select a date."
The date is outside the window	"Date must be after or equal to 01-04-2026." / "Date must be before or equal to 31-07-2026." (your dates will differ)
No company chosen	"Please select a company."
No customer chosen	"Please select a customer."
No currency chosen	"Please select a currency."
The exchange rate is not a number	"Exchange rate must be a number."
A negative exchange rate	"Exchange rate must be greater than or equal to 0."
No port of loading on an export invoice	"Please select a port of loading."
No port of discharge on an export invoice	"Please select a port of discharge."
No declaration chosen	"Please select a declaration."
No transport mode on an export invoice	"Please select transport mode."
No answer to Allow Pallet	"Please select whether pallet is allowed."

What happened	What you see
Terms of Delivery & Payment too long	"Terms of Delivery & Payment must be less than or equal to 5000 characters."
A negative figure in Additional Charges	"Additional charges cannot be negative."
No lines on the invoice	"Please add at least one item to the invoice."
A dispatch quantity left empty	"Please enter dispatch quantity."
A dispatch quantity of 0 or less	"Dispatch quantity must be greater than 0."
A dispatch quantity with too many decimals	"Dispatch quantity only up to 3 digits are allowed after the decimal point."
A dispatch quantity above what is outstanding	"Exceeds available qty (12.000)." (your figure will differ)
A rate left empty	"Please enter rate."
A rate of 0 or less	"Rate must be greater than 0."
A rate with too many decimals	"Rate only up to 4 digits are allowed after the decimal point."
An HSN code containing anything but digits	"HSN code must contain only numbers."
An order in a different currency	"The following Purchase Order(s) have a different currency than the invoice currency: " then the order numbers
An order with a different dispatch location	"The following selected Purchase Order(s) do not match the selected invoice dispatch details: " then the order numbers
Something else went wrong	"Something went wrong. Please try again later."

What happens behind the scenes

- The company's and customer's details are **copied onto the invoice as it is created**. From the company: name, address, logo, GSTIN, PAN, bank details, IEC, AEO certificate number, REX number, EORI number, CIN and country. From the customer: name, to-the-order name, address, GSTIN, EORI number, country, state and currency. Also the chosen dispatch location, the port names and the declaration wording. Correcting any of those afterwards **never reaches** this invoice or its documents. The correction must be made before the invoice is created, or the invoice must be raised again.
- Saving an invoice moves its purchase orders to **In Progress**, without telling you. Only orders sitting at Pending move; orders already further along stay where they are.
- **The orders' outstanding quantities are rewritten** to reflect what this invoice takes. Other invoices drawing on the same orders have their outstanding figures refreshed at the same time.
- The invoice is given a **draft number** as it is created, built from the company's own invoice numbering with "-DRAFT" on the end. See The different numbers.

- **Nothing about packing exists yet.** Packing is entered separately once the invoice exists. See How packing works.

FAQs

Why did the port and transport mode boxes empty themselves?

When the company's country and the destination country match, the invoice is domestic: Port of Loading, Port of Discharge and Transport Mode are switched off, emptied, and lose their required marker. The boxes react as soon as you change the company, the customer or the dispatch location.

Why is a purchase order missing from the list?

An order appears only if it belongs to the chosen company and customer, its status is Pending, In Progress or Partially Dispatch, at least one line still has quantity outstanding, and its dispatch location matches the invoice's. The dispatch-location rule is the one people miss.

Should I enter 0 in Exchange Rate when it does not apply?

No, leave the box empty; an empty box is treated as a rate of 1. A 0 is stored, and it makes the tax invoice's converted-amount columns appear, filled with figures worked out at a rate of 1, showing a conversion that did not happen.

Can I invoice only part of an order?

Yes. Each line arrives with the outstanding amount filled in as its Dispatch Qty, and you can lower it to invoice part of the order now. The rest stays on the order for another invoice later.

Why didn't correcting the customer's address change my invoice?

The company's and customer's details are copied onto the invoice as it is created, and corrections made afterwards never reach it or its documents. The correction must be made before the invoice is created, or the invoice must be raised again.

Why did the purchase order's status change to In Progress on its own?

Saving an invoice moves its purchase orders from Pending to In Progress without telling you. Orders already further along stay where they are.

Related pages

- Changing an invoice: what changes safely and what destroys work
- Completing an invoice: the final, irreversible step
- Finding invoices: the list, its filters and its exports
- Creating a purchase order: where the orders come from
- Customer: dispatch locations and the over-ordering setting
- Company: declarations, invoice numbering and the tax setting
- How packing works: the next step
- About documents: the paperwork this invoice produces
- Trade and tax terms: IGST, CGST, SGST and the rest

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Viewing an invoice

TL;DR

> This page covers the View screen: what the information icon on an invoice row opens, what it shows, and what it deliberately does not let you do. It is the one invoice screen that changes nothing, so it is safe to open on any invoice at any stage.

What this is for

The View screen is the whole invoice on one page: its numbers, its money, its shipping details, its lines, and how far its packing and pallet work has got. Nothing on it can be edited. Use it to check an invoice without risking it.

It is the only action available on every row, including removed ones.

Opening it

1. Open **Invoice** in the top menu.
2. Select the **View** (information) icon on the invoice's row.

What is on the screen

A status badge sits at the top, reading In Progress, Complete, Delivered or Delete, the same badge the list shows.

Panel	What it holds
Invoice Overview	Invoice Number, Draft Number, Invoice Date, PO Number, Company, Customer, Allow Pallet
The money panels	Total Amount, Additional Charges, Final Amount, Total Taxable Amount

Panel	What it holds
Invoice Documents	The same downloads and prints the list row offers
Currency & Exchange	Port of Loading, Port of Discharge, Transport Mode, Dispatch Details
The item table	One row per invoice line: Sales Order, Product, HSN Code, Actual Qty, Dispatch Qty, UOM, Rate, Amount

Ports, Transport Mode and Dispatch Details read "N/A" where they do not apply, which is normal on a domestic or By Air invoice.

Packaging and Pallet Details

Two panels at the foot show how far the shipment work has got, without leaving the invoice. Both are collapsed until you select their heading.

Panel	What it summarises
Packaging Details	A status badge, then the totals: so many cartons, so much quantity
Pallet Details	A status badge, then the totals: so many pallets, so many cartons, the gross weight in kilograms

Where the work has not started, the panel says "Not created yet", with "No packaging has been created for this invoice yet." or "No pallets have been created for this invoice yet." inside it.

The panels follow your access. The Packaging panel needs Packaging Read; the Pallet panel needs Pallet Read. Without either, neither panel is drawn at all.

What this screen will not do

- **Nothing here can be edited.** There are no boxes to type in and no Save button, whatever the invoice's status.
- **It does not replace the packing or pallet screens.** The panels summarise; the work itself is done on its own screens.
- **A removed invoice opens but its documents do not.** Reaching a download or print for one is refused with "This invoice has been deleted and cannot be accessed."

FAQs

Why can I not change anything on this screen?

By design. The View screen exists to be read. Use the Edit (pencil) icon on the row for a draft, or for the four fields a completed invoice still allows.

Why do I not see the Packaging or Pallet panels?

They follow your access: the Packaging panel needs Packaging Read and the Pallet panel needs Pallet Read. Without either permission neither panel is drawn.

Why do the ports and transport mode read "N/A"?

Because they do not apply. A domestic invoice carries no ports and no transport mode, and an invoice going By Air carries no ports.

Related pages

- Finding invoices: the list this screen opens from, and what else each row offers
- Changing an invoice: the screen that does allow changes
- The change history: what was corrected after completion
- About documents: what the Invoice Documents panel offers
- How packing works: the work the Packaging panel summarises
- Building a pallet manifest: the work the Pallet panel summarises

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Changing an invoice

TL;DR

> This page covers changing a draft invoice, and what each change costs. Most changes are safe, but three destroy packing and pallet work that cannot be recovered. Read the three warnings below before you change a dispatch quantity, remove a line, or switch Allow Pallet off.

What this is for

A draft invoice can be changed until you complete it. Most changes are safe. **Three are not.** They destroy packing and pallet work permanently, and the software does not always warn you.

This page marks each of the three at the point where you make it. Read the warning before you act, not afterwards.

Before you start

What you can change depends on how far the invoice has got:

- **In Progress.** Everything on this page applies.
- **Complete.** Four things can still be corrected, and every correction is recorded. See **Changing a completed invoice** below.
- **Delivered.** Nothing can be changed, by anyone. See **Once the invoice is delivered** below.

Changing an invoice

1. Open **Invoice** in the top menu.
2. Select the **Edit** (pencil) icon on the invoice's row. The icon appears on every row that is not Delivered. On a completed invoice it opens a much narrower screen. See **Changing a**

completed invoice below.
3. Change what you need.
4. Select **Update**.

You return to the list and see "Invoice has been updated successfully!".

What can never be changed

Four boxes are switched off on the edit screen and cannot be changed for the life of the invoice:

- **Company**
- **Customer**
- **Currency**
- **Dispatch Details**

Dispatch Details is the one people try. The box sits on the screen, filled in, looking editable. It is not, and no message explains why. The delivery location is fixed when the invoice is created, because the purchase orders were matched against it.

To send goods to a different location, delete this invoice and raise a new one.

Changing a dispatch quantity

> **This destroys packing work. Nothing on the screen warns you.**

Changing a line's **Dispatch Qty** on an invoice that already has packing removes work you cannot get back. It happens on **any** change to the figure, larger or smaller, not only when you reduce it.

Here is what a reader sees afterwards, for one changed line:

- Every packing row for that line disappears **except one**. The one that survives is the row holding the largest quantity, which is not necessarily the first row on the packing screen.
- The pallet placements of those removed rows **go with them**. The cartons are no longer on any pallet.
- **The surviving row's gross weight returns to zero** if it now holds more than the new quantity.
- If the surviving row was in a carton group, the group is **broken up**. The row goes back to the carton it used before it joined the group, and its gross weight returns to zero whatever the quantity.
- If the total packed **still exceeds** the new quantity, further rows are removed, newest first, until it fits. A row that is only partly over is kept and recalculated.

- **Pallets left holding nothing are removed**, and a manifest left with no pallets is removed too.

None of this can be undone. Re-pack the line and type the weights in again.

> **IMAGE PLACEHOLDER: changing-an-invoice-dispatch-qty-01** · before-and-after diagram · status: pending
>
> **Shows:** what a single dispatch-quantity change removes from packing and pallets
>
> **Must include:** a "before" column with one invoice line packed across three carton rows, two of them on a pallet and one of them inside a carton group; an "after" column showing only the largest row surviving, its gross weight back at zero, the carton group broken up, and the removed rows' pallet placements gone; a caption stating this happens on any change to the figure, up or down
>
> **Must not show:** any real customer, invoice number, product or company data
>
> **Alt text (draft):** Changing a line's dispatch quantity removes every packing row for that line except the one holding the largest quantity, together with the pallet placements of the removed rows. The surviving row loses its gross weight if it now holds too much, and is taken out of any carton group it was in.

Removing a line

> **This destroys packing and pallet work for that line. It cannot be recovered.**

Taking a line off the invoice removes, permanently:

- Every packing row belonging to that line.
- Every pallet placement of those rows.
- The line itself.

None of it is kept in a removed state anywhere. It is gone from the system, and no screen or export will show it again. Carton groups left holding nothing are tidied away, pallets left empty are removed, and a manifest left with no pallets is removed too.

The purchase order behind the line is put back in step: its outstanding quantity is recalculated and its status reworked, so the goods become available to invoice again.

Turning Allow Pallet from Yes to No

> **This destroys every pallet for the invoice, permanently. Switching it back to Yes brings nothing back.**

Setting **Allow Pallet** to **No** and saving removes every pallet, every carton placement on those pallets, and every pallet measurement for this invoice, including ones already removed earlier. The invoice's pallet quantity is set to zero.

There is no way back. The manifest must be built again from the start.

A confirmation appears first, but only sometimes. Export ERP asks only when the invoice already has at least one pallet. The window is headed "Are you sure?" and reads:

"Disabling pallets will permanently delete all created pallet records associated with this invoice upon submitting. This action cannot be undone."

The buttons are **Yes, delete** and **Cancel**. Choosing Cancel puts the answer back to Yes.

Two things about that confirmation are worth knowing. It appears when you change the answer, not when you save. The deletion happens later, when you select **Update**. And if the invoice has no pallets yet, no confirmation appears at all, because there is nothing to lose.

Changing the Rate on a line that is already there

The rate you type is **not kept**. Everything worked out from it is kept. The line's amount, the invoice totals and the tax all follow the new rate, while the Rate column keeps the old one.

Type a new rate and the screen behaves as you expect. The **Amount** on the line, the invoice totals and the tax all move. Save, then reopen the invoice. The **Rate** box holds the value it had before. The **Amount** box holds the figure worked out from the rate you typed.

The two no longer agree. Quantity times the rate shown does not give the amount shown.

This reaches your customer. Four documents print a rate beside an amount: "Invoice", "Invoice To The Order", "Tax Invoice" and "Tax Invoice To The Order". Each prints the stored rate next to an amount worked out from a different one. A buyer, a bank or a customs officer sees a line that does not multiply out.

A rate typed on a line that is **new to the invoice** is kept. What decides it is the age of the line, not the value.

Set the rate before the first save. On a line brought in from a purchase order and saved for the first time, whatever you type is stored.

To replace a rate that is already stored, remove the line and add it again from the purchase order. Enter the correct rate before you save.

Removing a line destroys the packing and pallet work for that line, **permanently**. That repair is therefore safe only before packing starts. Once a line is packed, correcting its rate costs the packing rows, their weights and their pallet placements. See **Removing a line** above.

If the line is already packed and its rate is wrong, neither choice is free. Tell your administrator before you decide.

Things that do not work as expected describes the same behaviour from the symptom. Look for the entry "I changed a Rate on an invoice and the total updated, but the rate went back".

Changes that are safe

Everything else on the edit screen can be changed without losing work:

- **Invoice Date**, within the same window as when creating.
- **Exchange Rate** and **Additional Charges**.
- **Port of Loading**, **Port of Discharge** and **Transport Mode**, where the invoice is an export. On a domestic invoice all three stay switched off.
- **Declaration** and **Terms of Delivery & Payment**.
- **HSN Code** on a line.
- Adding a line from another purchase order, as long as it passes the same currency and dispatch-location checks as when creating.

Changing a completed invoice

A completed invoice is not the dead end it looks like. The **Edit** icon stays on its row, and four things can still be put right:

Field	When it can be changed
Exchange Rate	Always
Transport Mode	Always, unless the invoice is domestic

Field	When it can be changed
Port of Loading	Only while Transport Mode is **Shipment**
Port of Discharge	Only while Transport Mode is **Shipment**

Everything else on the screen is locked. Lines, quantities, rates, dates, customer, company, declaration: none of them can be touched after completion.

Ports and transport mode move together. Switching to **By Air** clears both ports, because ports never apply to an air shipment. Switching back to **Shipment** lets you pick them again. A domestic invoice carries no transport mode and no ports at all.

What happens when you save

1. Change what needs correcting and select **Update**.
2. A **"Reason for Change"** window opens. It lists all four fields with their old and new values, showing an arrow only against the ones that moved.
3. Type the reason. It is required, up to 500 characters.
4. Confirm.

> **The reason is required on every save of a completed invoice**, even a save that changes nothing. Leaving it empty is refused with "Please enter a reason for updating this completed invoice."

What the figures do

Changing the exchange rate does not only change the rate. Export ERP rebuilds:

- every line's converted amount,
- the taxable amount and total taxable amount,
- the GST,
- and with them the grand total.

Each line is recalculated from its own stored amount in the customer's currency, not from the last converted figure. That is deliberate: it means correcting the rate five times in a row does not accumulate rounding error.

Example. An invoice for 6,718.45 in the customer's currency was completed at a rate of 109.2500, giving a total taxable amount of 733,990.6625. The bank confirms the rate should have been 110.5000. Correcting it produces 742,388.7250, and the change history records both figures.

Every revision is recorded

Each save writes an entry to the invoice's change history: the old and new values, the totals before and after, your reason, your name and the time. Nothing is silent, and nothing overwrites what came before. See The change history.

A completed invoice still cannot be deleted: "Invoice cannot be deleted as it is already complete." And there is still no way to reopen one as a draft. See Completing an invoice.

Once the invoice is delivered

Marking an invoice as delivered closes the door completely. The **Edit** icon disappears from its row, and reaching the edit screen another way is refused with:

"Invoice cannot be edited as it has been marked as delivered."

There is no way to undo it.

> **Check the exchange rate, transport mode and ports before you mark an invoice as delivered.** That is the last moment any of them can be corrected inside Export ERP.

See Marking an invoice as delivered.

Errors you may see

What happened	What you see
You opened the edit screen for a delivered invoice	"Invoice cannot be edited as it has been marked as delivered."
You saved a completed invoice without giving a reason	"Please enter a reason for updating this completed invoice."
The reason runs past 500 characters	"Reason must be less than or equal to 500 characters."
You tried to delete a completed invoice	"Invoice cannot be deleted as it is already complete."
A dispatch quantity above what is outstanding	"Exceeds available qty (12.000)." (your figure will differ)
An added order in a different currency	"The following Purchase Order(s) have a different currency than the invoice currency: " then the order numbers

What happened	What you see
An added order with a different dispatch location	"The following selected Purchase Order(s) do not match the selected invoice dispatch details: " then the order numbers
A date outside the window	"Date must be after or equal to 01-04-2026." / "Date must be before or equal to 31-07-2026." (your dates will differ)
A rate of 0 or less	"Rate must be greater than 0."
Something else went wrong	"Something went wrong. Please try again later."

The full list of every message is on Error messages.

What happens behind the scenes

- **A save of a completed invoice always records an entry**, even when none of the four fields moved. The entry carries the totals before and after and your reason, with the untouched fields left blank.
- **The company's and customer's details are never refreshed.** They were copied when the invoice was created. Correcting the customer's address today does not change this invoice, however many times you save it.
- **The packing sweep runs on every save**, for every line, not only the lines you touched. It compares each line's dispatch quantity against the packing it already has, and acts where they differ. A save that changes nothing changes nothing.
- Removed packing rows and pallet placements are **erased, not archived**. Unlike a deleted invoice or purchase order, they leave no trace and appear on no list.
- **Taxes are worked out again on every save**, from the current rates, quantities and charges.
- Adding lines moves their purchase orders to **In Progress**, the same as when creating.

FAQs

Why can't I change Dispatch Details when the box looks editable?

Dispatch Details is fixed for the life of the invoice, along with Company, Customer and Currency, and no message explains why. The delivery location is set when the invoice is created because the purchase orders were matched against it; to send goods elsewhere, delete this invoice and raise a new one.

Why did my packing rows disappear after I changed a dispatch quantity?

Any change to a line's Dispatch Qty, larger or smaller, removes every packing row for that line except the one holding the largest quantity, along with the removed rows' pallet placements. Nothing on the screen warns you and none of it can be undone; re-pack the line and type the weights in again.

Can I get my pallets back by switching Allow Pallet back to Yes?

No. Setting Allow Pallet to No and saving removes every pallet, every carton placement and every pallet measurement permanently, and switching it back to Yes brings nothing back. The manifest must be built again from the start.

Why did no confirmation appear before my pallet work was deleted?

Export ERP asks "Are you sure?" only when the invoice already has at least one pallet. If the invoice has no pallets yet, no confirmation appears at all, because there is nothing to lose.

Why did the Rate go back to its old value while the total kept my new figure?

A rate typed on a line that is already on the invoice is not kept, though the amount, totals and tax worked out from it are. To replace a stored rate, remove the line and add it again from the purchase order with the correct rate before saving, but note that removing a packed line destroys its packing and pallet work permanently.

Can I change a completed invoice?

No. The Edit icon disappears from its row, reaching the edit screen another way is refused, and a completed invoice cannot be deleted either. There is no way to reopen it.

Related pages

- Creating an invoice: the fields and the rules behind them
- Completing an invoice: the point after which nothing can be changed
- Finding invoices: which rows offer an Edit icon

- How packing works: the packing this page can destroy
- When pallet work changes on its own: every silent pallet change, from the pallet side
- When work seems to have disappeared: what to check when packing has vanished
- Error messages: every message in one list

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Completing an invoice

TL;DR

> This page covers marking an invoice as complete: what must be true first, what the window asks you for, and what changes afterwards. Completion cannot be reversed by anyone, so check the invoice before you start.

What this is for

Completing an invoice is the moment a draft becomes a real commercial document. The invoice takes its permanent number, and the shipment locks.

Complete is not the last state an invoice reaches. After it comes **Delivered**, which somebody marks by hand and which closes off even the few corrections completion leaves open. See Marking an invoice as delivered.

> **Completing an invoice cannot be undone.** There is no button, no menu entry, and no path anywhere in Export ERP that returns a completed invoice to a draft. Nothing you can do afterwards will reopen it. Four things can still be corrected on a completed invoice: the exchange rate, the transport mode and the two ports. Nothing else. See [Changing an invoice](/books/invoices/page/changing-an-invoice); for anything beyond those four, the remedy is outside this system.

Before you start

- Every line on the invoice must be packed to its full dispatch quantity.
- Every row on the packing list must carry a gross weight above zero.
- The pallet requirements for this invoice must be met. What those are depends on **Allow Pallet** and **Transport Mode**. See When pallets are needed.
- You need the final invoice number to use, and the invoice date.

Completing an invoice

1. Open **Invoice** in the top menu.
2. Select the **Mark as Complete** (tick) icon on the invoice's row. The icon appears only on In Progress rows.
3. The "Mark as Complete" window opens.
4. Check **Invoice Number** and **Invoice Date**.
5. Select **Mark as Complete**. (**Cancel** closes the window and changes nothing.)

You return to the list and see "Invoice has been completed successfully!".

The window is a form, not a confirmation

This is the part people misread. The window does not only ask "are you sure". It takes **two pieces of information** and saves them both.

Invoice Number arrives pre-filled with the next number available for this company. **You can change it**, and whatever is in the box when you select **Mark as Complete** becomes the invoice's permanent number. Your company's prefix or postfix sits beside the box, greyed, showing how the finished number will read; you type only the number part.

Invoice Date arrives holding the invoice's current date. The date you leave in this box **replaces the date on the invoice**. A date typed here overwrites what was entered when the invoice was created.

So treat the window as data entry. Read both boxes before selecting the button.

What the system checks, in order

The checks run in this order and stop at the first failure.

#	What is checked	Message when it fails
1	The invoice is not already complete	"This Invoice has already been marked as complete."

#	What is checked	Message when it fails
2	The number sequence is not already used by this company	"This Invoice Number sequence (7) has already been used by another user. Please refresh and try again." (your number will differ)
3	Every line is packed to its full dispatch quantity, and no packing row has a gross weight of zero	"Invoice cannot be marked as complete as some products are not fully packaged."
4	The pallet requirements are met	"Invoice cannot be marked as complete as some products are not fully palletized."
5	For a **By Air** invoice with **Allow Pallet** set to Yes and no pallet manifest, that you have confirmed you meant it	"No pallet has been configured for this By Air invoice. Please confirm if you want to proceed without a pallet."

Check 3 covers two different problems with one message: unpacked quantity and a missing weight. Check the packing list for both.

Check 5 is a question, not a refusal. It appears as a window carrying that message, with **Yes, complete it!** and **No, cancel**. Confirming lets the completion go ahead without pallets.

The **Invoice Number** and **Invoice Date** boxes are checked before any of this. An empty, non-numeric, over-long or already-used number is refused first.

What changes at completion

- **The invoice takes its permanent number.** The draft number stops being the one that matters.
- **The invoice date is set** to whatever was in the window.
- **The status becomes Complete.** The Delete and Mark as Complete icons disappear from the row. The **Edit** icon stays, but now opens a much narrower screen. Two icons appear in their place: **Change History** and **Mark as Delivered**.
- **The packing list becomes Complete too.** It can no longer be edited.
- **The pallet manifest becomes Complete.** It can no longer be edited.
- **The documents stop saying DRAFT.** Every document now carries the real number, and downloaded files are named with it. See About documents.

Draft numbers

An invoice is given a draft number the moment it is created. It is built from the company's own invoice numbering: its pattern as a prefix or a postfix, and the next sequence number, with **-DRAFT** on the end. A company using the pattern EXG as a prefix produces draft numbers reading EXG12-DRAFT. Set as a postfix, the same company produces 12EXG-DRAFT. Any separator you see is part of the pattern the company entered.

Draft numbers are counted separately from invoice numbers, so the draft sequence and the final sequence are not the same run of numbers.

The draft number is kept after completion. It is not cleared, and it stays visible in the **Draft ID** column of the invoice list. It is only ever a working label: it appears on no document and in no downloaded file name.

> **IMAGE PLACEHOLDER: completing-an-invoice-number-lifecycle-01** · timeline diagram · status: pending
>
> **Shows:** how one invoice's numbers change from creation to completion
>
> **Must include:** four stages left to right: created (draft number ending -DRAFT, no invoice number, documents show DRAFT or N/A), edited (unchanged), completed (permanent invoice number assigned, invoice date set from the completion window, draft number kept and still shown in the Draft ID column), delivered (nothing further changes, and no number moves); a note that the tax invoice shows N/A rather than DRAFT before completion; a note that completion cannot be reversed; a note that the exchange rate, transport mode and ports remain correctable between completed and delivered, and not after
>
> **Must not show:** any real customer, company or invoice number
>
> **Alt text (draft):** An invoice carries a draft number ending in -DRAFT from creation until completion. Completing it assigns the permanent invoice number and sets the invoice date from the completion window. The draft number is kept and stays in the Draft ID column. Completion cannot be reversed. Between completion and delivery the exchange rate, transport mode and ports can still be corrected; marking the invoice as delivered closes that window and changes no number.

Errors you may see

What happened	What you see
The invoice was completed by someone else while your window was open	"This Invoice has already been marked as complete."

What happened	What you see
Someone used this number sequence while your window was open	"This Invoice Number sequence (7) has already been used by another user. Please refresh and try again."
A line is not fully packed, or a packing row has no gross weight	"Invoice cannot be marked as complete as some products are not fully packaged."
The pallet requirements are not met	"Invoice cannot be marked as complete as some products are not fully palletized."
By Air, pallets allowed, no manifest built	"No pallet has been configured for this By Air invoice. Please confirm if you want to proceed without a pallet."
The number box is empty	"Please enter invoice number."
The number contains anything but digits	"Invoice number must be a number."
The number is too long	"Invoice number must be less than or equal to 10 digits."
Another invoice already carries this number	"Invoice number already exists."
No date in the window	"Please select invoice date."
The date is outside the window	"Date must be after or equal to 01-04-2026." / "Date must be before or equal to 31-07-2026." (your dates will differ)
Something else went wrong	"Something went wrong. Please try again later."

When you cannot complete an invoice works through each refusal and what to do about it.

What happens behind the scenes

- **Taxes are not worked out again at completion.** They are frozen as they stood at the last save of the invoice. This matters: if a rate, an additional charge or an exchange rate was changed and the invoice was not saved afterwards, the tax on the completed invoice reflects the older figures. Save the invoice before completing it.
- **The invoice number is checked twice**: once against every invoice in the system, and again against this company's own numbering. The second check is what produces the "already been used by another user" message.
- The packing list and pallet manifest are **locked in the same action**, without a separate message for either.
- **Nothing about the documents is stored.** They are still built fresh each time; only the number they carry has changed.
- **Numbers are never reused.** Both sequences are worked out from the highest number this company has already used, counting deleted invoices as well. Deleting an invoice does not free its number for the next one.

FAQs

Can I undo completing an invoice?

No. There is no button, no menu entry, and no path anywhere in Export ERP that returns a completed invoice to a draft. Four things can still be corrected on a completed invoice, each one recorded in its change history: the exchange rate, the transport mode and the two ports. For anything else, the remedy is outside this system.

Can I change the invoice number the window suggests?

Yes. The Invoice Number box arrives pre-filled with the next number available for this company, but whatever is in the box when you select Mark as Complete becomes the invoice's permanent number. You type only the number part; the company's prefix or postfix sits greyed beside it.

Why did the invoice date change after I completed it?

The Mark as Complete window is a form, not a confirmation. The date you leave in its Invoice Date box replaces the date on the invoice, overwriting what was entered when the invoice was created. Read both boxes before selecting the button.

What does "not fully packaged" actually mean?

That message covers two different problems: a line not packed to its full dispatch quantity, or a packing row with a gross weight of zero. Check the packing list for both.

Why is the tax on my completed invoice wrong?

Taxes are not worked out again at completion; they are frozen as they stood at the last save of the invoice. If a rate, an additional charge or an exchange rate was changed without saving afterwards, the completed invoice reflects the older figures, so save the invoice before completing it.

Does deleting an invoice free its number for the next one?

No. Numbers are never reused; both sequences are worked out from the highest number the company has already used, counting deleted invoices as well.

Related pages

- Creating an invoice: where the draft begins
- Changing an invoice: the last chance to change anything
- Marking an invoice as delivered: the step after this one
- The change history: what was corrected after completion, and why
- Finding invoices: how completed invoices appear in the list
- When you cannot complete an invoice: every refusal and its remedy
- When pallets are needed: what check 4 is testing
- About documents: what completion changes on the paperwork
- The different numbers: draft number, invoice number, sales order number

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Marking an invoice as delivered

TL;DR

> This page covers marking a completed invoice as delivered: when the action appears, what it asks you, and what it takes away. Marking as delivered cannot be reversed, and it is the point after which nothing about the invoice can be corrected.

What this is for

Marking an invoice as delivered records that its job is finished. It is the last step in an invoice's life and the only one that comes after completion.

Export ERP does not work this out for itself. Nothing in packing, pallets, documents or dates sets it, and nothing clears it. It is a marker one person puts on the invoice, by hand, once.

> **Marking an invoice as delivered cannot be undone.** There is no button, no menu entry and no path anywhere in Export ERP that returns a delivered invoice to Complete. Check the exchange rate, transport mode and ports first: this is the last moment any of them can be corrected.

Before you start

- The invoice must be **Complete**. A draft cannot be marked as delivered.
- You need the same access that lets you edit invoices.
- Check anything still correctable. See Changing an invoice.

Marking an invoice as delivered

1. Open **Invoice** in the top menu.
2. Find the invoice. Its badge must read **Complete**.
3. Select the **Mark as Delivered** (double tick) icon on its row. The icon appears only on Complete rows.
4. A confirmation window opens, headed "Are you sure you want to mark this Invoice as Delivered?" and warning "Once delivered, the invoice can no longer be edited."
5. Select **Yes, mark as delivered!**. (**Cancel** closes the window and changes nothing.)

You return to the list and see "Invoice has been marked as delivered successfully!".

What changes

- **The badge turns cyan and reads Delivered.**
- **The invoice leaves the Complete group.** The Select Status filter's "Complete" choice, and the dashboard's Complete figure, both stop counting it. It is now found under "Delivered".
- **It moves in the list.** The default order groups Delivered between In Progress and Complete, most recently changed first.
- **The Edit icon disappears.** Reaching the edit screen another way is refused with "Invoice cannot be edited as it has been marked as delivered."
- **The Mark as Delivered icon disappears too.** The action is available once.
- **Everything else stays.** View, Change History, Downloads and Print all work exactly as before.

What does not change

Nothing else moves at all. Worth stating plainly, because people expect more:

- The invoice number, the invoice date and every figure stay as they were.
- The packing list and the pallet manifest are untouched.
- **No document changes.** Delivery appears on no PDF anywhere.
- No email is sent, and nobody is notified.

Marking as delivered records a fact for the people using Export ERP. It does not act on anything.

Errors you may see

What happened	What you see
The invoice is still a draft	"Only a completed Invoice can be marked as delivered."
Somebody marked it while your screen was open	"This Invoice has already been marked as delivered."
You opened the edit screen for a delivered invoice	"Invoice cannot be edited as it has been marked as delivered."
Something else went wrong	"Something went wrong. Please try again later."

Where delivered invoices show up

Screen	What you see
Invoice list	A Delivered badge, a **Delivered** choice in Select Status, and the word "delivered" working in the search box
The dashboard	A fourth Invoices figure, "Delivered", counted into the card's total
Customer Dashboard	A Delivered badge on the Dispatches table, and **Delivered** in its Invoice Status filter
Pallet manifest	Its header badge reads "Invoice: Delivered"

IMAGE PLACEHOLDER: marking-an-invoice-as-delivered-lifecycle-01 · timeline diagram · status: pending

Shows: where marking as delivered sits in an invoice's life, and what each step closes off

Must include: four stages left to right: In Progress (everything editable, can be deleted, can be completed), Complete (numbered and locked, but exchange rate, transport mode and ports still correctable, and every correction recorded), Delivered (nothing editable at all), with Delete shown as a one-way exit reachable only from In Progress; one-way arrows between the stages showing no path back; a note that the correctable window closes at Delivered

Must not show: any real customer, company or invoice number

Alt text (draft): An invoice moves one way through In Progress, Complete and Delivered. A draft can be edited fully, deleted or completed. A completed invoice keeps a narrow window in which its exchange rate, transport mode and ports can be corrected, with every correction recorded. Marking it as delivered closes that window permanently. Delete is a one-way exit available only from In Progress.

FAQs

Can I undo marking an invoice as delivered?

No. There is no button, no menu entry and no path anywhere in Export ERP that returns a delivered invoice to Complete. Nothing you can do afterwards will reopen it.

Why did my Complete count drop when nobody deleted anything?

Somebody marked an invoice as delivered. Complete means "complete but not yet delivered", so a delivered invoice leaves the Complete group and joins the Delivered one. The total is unchanged.

Can I mark a draft as delivered?

No. The icon appears only on Complete rows, and reaching the action another way is refused with "Only a completed Invoice can be marked as delivered." Complete the invoice first.

Does marking as delivered change the paperwork?

No. Delivery appears on no document. The invoice number, the invoice date, every figure, the packing list and the pallet manifest all stay exactly as they were.

Who can mark an invoice as delivered?

Anyone whose role can change invoices. No separate permission was added for it, so the same access that allows editing allows marking as delivered.

I need to fix the exchange rate on a delivered invoice. What now?

Nothing inside Export ERP will do it. The correctable window closes at Delivered, which is why the confirmation warns you before you use it. The remedy is outside this system.

Related pages

- Completing an invoice: the step before this one
- Changing an invoice: what can still be corrected while an invoice is Complete
- The change history: what was corrected, and why
- Finding invoices: the badges, the filters and what each row offers
- The dashboard: where the Delivered figure appears

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The change history

TL;DR

> This page covers the change history: the clock icon on completed and delivered invoices, what it records, and how to read an entry. It exists because a completed invoice can still be corrected, and every correction leaves a trace.

What this is for

Completing an invoice locks almost everything, but four things can still be corrected afterwards: the exchange rate, the transport mode and the two ports. The change history is the record of those corrections. It answers "who changed this figure, when, and why".

It only ever covers what happened **after** completion. Nothing a draft did appears here.

Opening it

1. Open **Invoice** in the top menu.
2. Select the **Change History** (clock) icon on the invoice's row. The icon appears on Complete and Delivered rows only.
3. A window headed **Change History** opens, with the invoice number beside the heading.

You need read access to invoices, and the invoice must belong to a company you are assigned to.

How to read an entry

Entries run newest first. Each one carries the date and time, the person who made the change, the reason they typed, and six figures shown as "before" and "after":

Line	What it holds
Exchange Rate	The rate before and after this change

Line	What it holds
Transport Mode	Shipment or By Air
Port of Loading	
Port of Discharge	
Total Taxable Amount	In the company's currency
Grand Total	In the company's currency

All six are listed every time, whether or not they moved. A line that did not change shows the same value on both sides. This is on purpose: the reason was written against the whole picture, so the whole picture is kept with it.

The last entry is the original. Below the oldest change, the window shows the values the invoice carried before anything was corrected.

What "N/A" means here

"N/A" is not zero and not an error. It means the value genuinely does not exist:

- **Ports on a By Air invoice.** Ports never apply to air shipments, so both read N/A.
- **A figure from before that line was recorded.** The ports were added to the history later than the rest, so entries written before that read N/A for them.
- **A person who no longer exists.** A change made by a user since removed shows N/A in place of the name.

When the window is empty

An invoice that has been completed but never corrected has nothing to show:

"No changes have been recorded for this invoice yet."

This is the normal state. Most invoices never need a correction.

Worked example

An invoice was completed at an exchange rate of 109.2500, giving a total taxable amount of 733,990.6625. The bank later confirmed the rate should have been 110.5000. Someone opened the invoice, corrected the rate, and gave "Bank advice: rate corrected" as the reason.

The change history now holds one entry:

Line	Before	After
Exchange Rate	109.2500	110.5000
Transport Mode	By Air	By Air
Port of Loading	N/A	N/A
Port of Discharge	N/A	N/A
Total Taxable Amount	733,990.6625	742,388.7250
Grand Total	(before)	(after)

Transport Mode repeats because it did not change. Both ports read N/A because the invoice ships By Air. Below the entry sits the original, showing the same starting figures.

What happens behind the scenes

- **Every save of a completed invoice writes an entry**, even a save where nothing moved. Such an entry shows all six lines unchanged, with the reason you gave.
- **Nothing here can be edited or removed.** Entries are written once and kept.
- **The history follows the invoice**, including after it is marked as delivered and after it is removed from the list.
- **Amounts use the company's currency**, not the customer's, because they are the converted figures.
- **The history is scoped by company.** You see it only for companies you are assigned to. A super admin sees them all.

FAQs

Why does the clock icon not appear on my invoice?

It appears only on Complete and Delivered rows. A draft has no history, because the history records only what changed after completion.

Why does a line show the same value twice?

Because that line did not change in that revision. All six lines are listed every time, so the reason is kept against the full picture rather than against one figure in isolation.

Why do both ports read N/A?

Either the invoice ships By Air, where ports never apply, or the entry was written before ports were recorded in the history. N/A means the value does not exist, not that it is zero.

There is an entry but nothing looks different. Why?

Somebody saved the completed invoice without altering any of the four correctable fields. A reason is required on every such save, so the entry records the reason with all six lines unchanged.

Can an entry be corrected or removed?

No. Entries are written once and kept, and they stay with the invoice after it is delivered or removed.

Related pages

- Changing an invoice: what can be corrected after completion, and what the save asks you
- Marking an invoice as delivered: the step that ends the correctable window
- Completing an invoice: where the history starts
- Finding invoices: which rows carry the clock icon

Last verified: 22 September 2026

Finding invoices

TL;DR

> This page covers the invoice list: its columns, search, filters, exports, and why some rows offer fewer actions than others. Use it when you are looking for an invoice, or wondering why an action you expected is missing from a row.

What this is for

The invoice list under **Invoice** in the top menu shows every invoice ever raised: drafts, completed ones, delivered ones, and ones marked Delete. This page explains the columns, the search, the filters, the exports, and why some rows offer fewer actions than others.

The list screen

Ten rows show at a time. The selector under the list offers 25, 50, 100, 500 and All. A search box at the top filters the list as you type, settling about a second after you stop.

If you can make changes, a button above the list offers **Add new invoice**.

The default order groups by status. In Progress first, then Delivered, then Complete, then Delete. Inside the Delivered group, the most recently changed invoices come first. Inside the Complete group, the highest invoice number comes first. Inside each group, the most recently added invoices come first.

The columns:

Column	What it holds
ID	The invoice's number in the system
Draft ID	The draft number, ending in "-DRAFT". Kept after completion
Invoice Number	The permanent number. Reads "N/A" until the invoice is completed

Column	What it holds
Invoice Date	Shown as day-month-year
Company	
Customer	
Status	A coloured badge. See below
Total Quantity	The quantity ordered across all lines
Total Dispatch Quantity	The quantity this invoice dispatches
Total Pallet Quantity	The quantity placed on pallets
Total Net Weight	In kilograms
Final Amount	Total Amount plus Additional Charges

The last column holds the actions, described below.

More columns exist than are shown. Eleven columns are held against the invoice but hidden from the screen. They are Total Amount, Additional Charges, Taxable Amount and Total Taxable Amount. Then Currency, Exchange Rate, Port of Loading, Port of Discharge, Dispatch Details, Terms of Delivery & Payment and Transport Mode. They appear in the exports.

Search and sorting

The search box matches the ID, the draft number, the invoice number, the date, the company name, the customer name and the status name. Typing "complete" finds completed invoices, "delivered" finds delivered ones, and "delete" finds ones marked Delete.

The date is searched in day-month-year form as well as the way it is stored, so either works.

Columns can be sorted by selecting their heading. Sorting by **Status** uses the grouped order described above rather than alphabetical order.

Filters

Three dropdowns sit beside the search box:

- **Select Status**: "All Statuses", "In Progress", "Complete", "Delivered" and "Delete".
- **Select Company**: narrows to one company. Choosing one clears the customer choice.
- **Select Customer**: narrows to one customer.

The filters and the search work together, and both apply to the "All" exports.

The four badges

Badge	Meaning
In Progress (blue)	A draft. It can be edited, deleted and completed. It has a draft number but no invoice number
Complete (green)	Numbered and locked, but **not yet delivered**. Its exchange rate, transport mode and ports can still be corrected
Delivered (cyan)	Marked as delivered. Nothing about it can be changed, by anyone, ever
Delete (red)	Removed. Still listed, and still readable

Complete means "complete but not yet delivered". Marking an invoice as delivered moves it out of the Complete group and into the Delivered one. The Complete filter, and the Complete figure on the dashboard, both leave delivered invoices out. A Complete count that drops by one on the day somebody marks a delivery is behaving correctly; nothing has gone missing. See Marking an invoice as delivered.

Delete is not a status the invoice holds. It is what the list shows for an invoice that has been removed. Only a draft can be removed; a completed or delivered invoice cannot.

Removed invoices stay in the list. They are never hidden and never purged. Their row keeps its numbers, dates and totals, and can still be opened and read.

What each row offers

Row	Actions available
In Progress	View, Downloads, Print, Edit, Delete, Mark as Complete
Complete	View, Change History, Downloads, Print, Edit, Mark as Delivered
Delivered	View, Change History, Downloads, Print
Delete (removed)	View only

The reasons are worth knowing:

- **Delete and Mark as Complete appear only on In Progress rows.** Both act on a draft, and a completed invoice is not a draft.
- **Edit appears on every row that is not Delivered**, completed ones included. On a completed invoice it opens a far narrower screen than on a draft: four fields rather than the whole invoice. See Changing an invoice.
- **Mark as Delivered appears only on Complete rows**, and only until it is used. It is the action that strips a row back to reading. See Marking an invoice as delivered.
- **Change History (the clock icon) appears on Complete and Delivered rows.** A draft has no history to show, because the history only records what changed after completion. See The change history.
- **A removed row offers nothing but View.** The Downloads and Print icons are not drawn on it at all. Reaching one of those links another way is refused with "This invoice has been deleted and cannot be accessed."
- **Downloads and Print need the right access.** Readers without it see neither icon on any row.
- **The Pallets entry is left out** of the Downloads and Print menus when "Allow Pallet" is No, and when the invoice ships By Air with no pallet manifest built.

See About documents for what the Downloads and Print menus contain.

Exporting the list

The **Export** menu offers Excel, Excel All, CSV, CSV All, PDF and PDF All.

The plain versions take the rows on screen. The "All" versions cover every matching invoice across all pages. If the search box or any filter is set, the export contains only the matches. Clear them first to export everything.

The exports carry more than the screen does. They include the hidden columns listed above: Total Amount, Additional Charges, Taxable Amount, Total Taxable Amount, Currency, Exchange Rate, both ports, Dispatch Details, Terms of Delivery & Payment and Transport Mode.

The PDF is produced in A3, landscape, and its file is named `Invoices_` followed by a number that changes each time.

What happens behind the scenes

- The company and customer names shown are the **invoice's own copies**, taken when the invoice was created. Renaming a company or customer afterwards does not change what this list shows for invoices already raised. Searching by the new name will not find them.

- **Invoice Number reads "N/A" rather than being blank** on drafts, because no number exists yet.
- **Total Pallet Quantity drops to zero** the moment "Allow Pallet" is switched to No on an invoice that had pallets.
- **Removed invoices keep their number sequences.** Deleting an invoice does not free its number for the next one.

FAQs

What is the difference between Complete and Delivered?

Complete means the invoice has taken its permanent number and locked, but its exchange rate, transport mode and ports can still be corrected. Delivered means somebody has marked it delivered, which removes even that: a delivered invoice can only be read. Marking as delivered cannot be undone.

Why did my Complete count drop when nobody deleted anything?

Somebody marked an invoice as delivered. Complete means "complete but not yet delivered", so a delivered invoice leaves the Complete group and joins the Delivered one. The total is unchanged. Filter by Delivered to see where it went.

How do I find deleted invoices?

Choose "Delete" in the Select Status filter, or type "delete" in the search box; the search matches the status name. Removed invoices are never hidden and never purged, so they stay in the list.

Why can't I find an invoice by searching the customer's new name?

The company and customer names shown are the invoice's own copies, taken when the invoice was created. Renaming a company or customer afterwards does not change what the list shows for invoices already raised, so searching by the new name will not find them.

Why does Invoice Number read "N/A" on some rows?

Those are drafts. An In Progress invoice has a draft number but no permanent invoice number yet, so the column reads "N/A" rather than being blank until the invoice is completed.

Why does my export contain columns the screen does not show?

Eleven columns are held against the invoice but hidden from the screen, including Total Amount, Additional Charges, Taxable Amount, Total Taxable Amount, Currency, Exchange Rate, both ports, Dispatch Details, Terms of Delivery and Payment, and Transport Mode. They appear in the exports.

Why did Total Pallet Quantity drop to zero on its own?

It drops to zero the moment "Allow Pallet" is switched to No on an invoice that had pallets.

Related pages

- Creating an invoice: what **Add new invoice** opens
- Viewing an invoice: what the information icon opens
- Changing an invoice: what the Edit icon opens, and what it can destroy
- Completing an invoice: what the tick icon opens
- Marking an invoice as delivered: what the double-tick icon opens
- The change history: what the clock icon opens
- About documents: the Downloads and Print menus
- Finding orders: the same ideas on the order list
- The different numbers: draft number against invoice number
- When numbers do not match: when a total here disagrees with another screen

Last verified: 22 September 2026