

Once an invoice is marked as delivered it cannot be deleted

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When an invoice is first created you will see the Delete button available.

If you click the Print/Envelope icon and then select either Print, Deliver or Mark as Delivered, the invoice will no longer be able to delete. For this reason, we encourage our Dealer to always select the Preview option. This way, you will be able to see the PDF invoice and if for some reason delete it you could.

1. Manual invoice 11856 was just created.

The screenshot displays the ABC Company software interface. At the top, the company name 'ABC Company' is visible. The user 'Erick' is logged in, and the 'Support' and 'Logout' options are available. A navigation menu includes 'Customers', 'Invoices', 'Payments', 'RMR', 'Work Orders', 'Proposals', 'Calendar', 'GL', 'Reports', 'Setup', and 'Accounting'. A notification banner states 'The invoice was successfully created.' The main heading is 'Manual Invoice: Simba Steckel - 9000'. Below this, there are two summary boxes: one for invoice details (Invoice Number: 11856, PO Number, Work Order, Invoice Date: 08/30/2024, Due Date: 11/28/2024, Contact) and one for customer details (Customer Site: #1 Simba Steckel - 1341 Weathervane Lane, Sales Tax: ohio base - 5.7500%, Term: 90 Days, Salesperson: Brad Solomon, Delivery Method: Mail, Warehouse: Main Warehouse - Main Warehouse, Sales Package: None). A summary table shows: Items Total \$100.00, Parts Total \$0.00, Tax Total \$0.00, Invoice Total \$100.00, Payments (\$0.00), Credits (\$0.00), and Amount Due \$100.00. Below the summary is a table for 'Invoice Items' with columns for Item Part Code, Item Description, Qty, Rate, Taxable, Sales Tax C..., and Amount. The first item is '311 Kit' with description 'Basic house Package', Qty 1, Rate \$100.00, Taxable No, Sales Tax C... ohio base, and Amount \$100.00. The interface also shows a 'Tax Exempt' checkbox and a pagination indicator '1 - 1 of 1 items'.

2. When you click the Print/Envelope icon (to the right of the Delete trash can button) you are given the option to Preview, Print, Deliver or Mark as Delivered.

The screenshot displays the ABC Company software interface. At the top, the company name "ABC Company" is visible, along with user information "Erick" and "Support". A navigation menu includes "Customers", "Invoices", "Payments", "RMR", "Work Orders", "Proposals", "Calendar", "GL", "Reports", "Setup", and "Accounting". A notification bar states "The invoice was successfully created." The main section is titled "Manual Invoice: Simba Steckel - 9000".

Invoice details include:
Invoice Number: 11856
PO Number:
Work Order:
Invoice Date: 08/30/2024
Due Date: 11/28/2024
Contact:
Customer Site: #1 Simba Steckel - 1341 Weathervane Lane
Sales Tax: ohio base - 5.7500%
Term: 90 Days
Salesperson: Brad Solomon
Delivery Method: Mail

A modal window titled "Invoice/Credit" is open, showing the following options:
Preview (with document icon)
Print (with printer icon)
Deliver (with envelope icon)
Mark as Delivered (with checkmark icon)
Cancel (with 'x' icon)

Summary fields show:
Items Total: \$100.00
Parts Total: \$0.00
Credits: \$0.00
Amount Due: \$100.00

Item Part Code	Item Description	Qty	Rate	Taxable	Sales Tax C...	Amount
Site: Simba Steckel - 1341 Weathervane Lane, OH						
311 Kit	Basic house Package	1	\$100.00	No	ohio base	\$100.00

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3. It is best practices to always select the Preview button until you are ready to physically print out the invoice or deliver/mark as delivered.
