

Create New Invoice for General Customer.



1

Navigate to

<https://staging.hoponticket.com/compta/facture/card.php?facid=42428>

2

Click "Billing | Payment"

3 Click "New invoice"

The screenshot shows the 'Billing and payment area' of a software application. The top navigation bar includes 'Home', 'Third...', 'Produ...', 'MRP', 'Projects', 'Comm...', 'Billing ...', 'Banks ...', 'HRM', 'Agenda', 'Tickets', 'Tools', 'NTAK', and 'Simple...'. The left sidebar is expanded to show 'Customer invoices' with 'New invoice' highlighted. The main content area features a bar chart titled 'Number of open invoices - Customer invoice'. The chart shows a single bar representing the number of open invoices, with a legend indicating different categories: 'Late (> 30 days)', 'Late (15 to 30 days)', 'Late (< 15 days)', 'To be collected (< 15 days)', 'To be collected (15 to 30 days)', and 'To be collected (> 30 days)'. Below the chart is a section for 'Number of open invoices - Vendor invoice'.

4 Click for the third party dropdown menu.

The screenshot shows the 'Select a third party' dropdown menu in the software application. The menu is open, displaying several options: 'Standard invoice', 'Receipt', 'Deposit invoice', 'Replacement invoice (This option is only available when creating an invoice from tab "Customer" of third party)', 'Credit note (This option is only available when creating an invoice from tab "Customer" of third party)', and 'Template invoice'. The 'Standard invoice' option is selected. Below the dropdown menu, there are several input fields and a 'Due Upon Receipt' dropdown menu.

5 Choose and click the Customer you want to use.

Select a third party

- Select a third party
- General Customer EUR
- John Smith
- Általános Vevő / General Customer

from tab "Customer" of the
Customer" of third party)

Now

Due Upon Receipt

de

6 Choose and click the type you want to use.

Third-... Produ... MRP Projects Comm... Billing ... Banks ... HRM Agenda Tickets Tools NTAK Simple... Group ... Storage B

New invoice

Customer: Általános Vevő / General Customer - Current outstanding bill:

Type:

- Standard invoice
- Receipt
- Deposit invoice
- Replacement invoice for invoice
- Credit note to correct invoice
- Template invoice

Discounts or credits available: This customer has no relative discount by default. (Edit relative c
This customer has no discount credit available. (Edit absolute dis

Invoice date: Now

Payment Terms: Due Upon Receipt

Payment method:

7 Fill or click "Now" to autofill date field.

Type

- Standard invoice ⓘ
- Receipt ⓘ
- Deposit invoice ⓘ
- Replacement invoice for invoice _____ ⓘ
- Credit note to correct invoice _____ ⓘ
- Template invoice ⓘ

Discounts or credits available

This customer has no relative discount by default. (Edit relative discount)
This customer has no discount credit available. (Edit absolute discounts)

Invoice date

Due Upon Receipt

Payment Terms

Due Upon Receipt

Payment method

Bank account

Project

Customer ZIP

Customer Country Code

Customer is foreigner

8 Fill the payment terms by using the dropdown menu.

Type

- Standard invoice ⓘ
- Receipt ⓘ
- Deposit invoice ⓘ
- Replacement invoice for invoice _____ ⓘ
- Credit note to correct invoice _____ ⓘ
- Template invoice ⓘ

Discounts or credits available

This customer has no relative discount by default. (Edit relative discount)
This customer has no discount credit available. (Edit absolute discounts)

Invoice date

2024/05/27 ⓘ Now

Payment Terms

Due Upon Receipt

Payment method

Bank account

Project

Customer ZIP

Customer Country Code

Customer is foreigner

Jutalék

NTAK Status

9 Choose and click what you want to use for Payment method.

Discounts or credits available

Invoice date

Payment Terms

Payment method

Bank account

Project

Customer ZIP

Customer Country Code

Customer is foreigner

Jutalék

NTAK Status

NTAK ID

Commission deduction

Credit note to correct invoice

Template invoice ⓘ

This customer has no relative discount by default. (Edit relative discount)
This customer has no discount credit available. (Edit absolute discounts)

2024/05/27 Now

Due Upon Receipt

- Due Upon Receipt
- 30 days
- 30 days of month-end
- 60 days
- 60 days of month-end
- Order
- Delivery
- 50-50
- 10 days

10 Choose the Payment method.

Type

Standard invoice ⓘ

Receipt ⓘ

Deposit invoice ⓘ

Replacement invoice for invoice ⓘ

Credit note to correct invoice ⓘ

Template invoice ⓘ

Discounts or credits available

Invoice date

Payment Terms

Payment method

Bank account

Project

Customer ZIP

Customer Country Code

Customer is foreigner

Jutalék

NTAK Status

NTAK ID

Commission deduction

This customer has no relative discount by default. (Edit relative discount)
This customer has no discount credit available. (Edit absolute discounts)

2024/05/27 Now

30 days

ⓘ ⓘ

11 Choose and click the payment method you want to use.

Discounts or credits available

This customer has no discount credit available. (Edit absolute discounts)

Invoice date 2024/05/27 Now

Payment Terms 30 days

Payment method **Credit card**

Bank account

Project

Customer ZIP

Customer Country Code

Customer is foreigner

Jutalék

TAK Status

TAK ID

Commission deduction

Marked for storno

Payment Trans. id

12 Click to choose the Bank account.

Receipt i

Deposit invoice i

Replacement invoice for invoice i

Credit note to correct invoice i

Template invoice i

Discounts or credits available

This customer has no relative discount by default. (Edit relative discount)

This customer has no discount credit available. (Edit absolute discounts)

Invoice date 2024/05/27 Now

Payment Terms 30 days

Payment method **Credit card**

Bank account **Bank account**

Project

Customer ZIP

Customer Country Code

Customer is foreigner

Jutalék

NTAK Status

NTAK ID

Commission deduction

Marked for storno

15 On the following page you can choose the products and services to add.

The screenshot shows a software interface for creating a vendor invoice. The interface is divided into several sections:

- Vendor Invoices:** A sidebar on the left with options like 'New invoice', 'List', 'List of templates', 'Payments', 'Statistics', 'Billable orders', 'Taxes | Special exp...', 'Social/fiscal taxes', 'VAT', and 'Miscellaneous paym...'.
- Invoice Details:** A central area with fields for 'Discounts or credits available', 'Invoice date' (2024/05/27), 'Payment Terms' (30 days), 'Payment due on' (2024/06/26), 'Payment method' (Credit card), 'Currency' (HUF - Hungary Forint), 'Bank account' (granthuf), 'Customer ZIP', 'NAV Transaction ID', 'Customer Country Code', 'Customer is foreigner', 'Jutalék', 'NTAK Status', 'NTAK ID', 'Commission deduction', 'Marked for storno', 'Payment Tranz. id', and 'Group'.
- Amount VAT:** A table on the right showing 'Amount (inc. tax)' as 0 Ft, 'Payments' as 0, and 'Remaining unpaid' as 0.
- Add new line:** A section at the bottom with a dropdown menu for 'Free-text item, type' and 'Predefined products/services to sell'. An orange circle highlights the dropdown menu. Below this are fields for 'DiscountHours', 'DiscountPercent', and 'If product is a service with limited duration: From' to 'to'. An 'ADD' button is visible.

16 Choose and click what you want to add.

The screenshot shows a dropdown menu for selecting products and services. The menu is open, displaying several options. An orange circle highlights the option 'Boat24HUFBundleBase - Boat 24h (HUF) - 25 Hours - 787.4015 Ft Excl. tax'.

The options listed in the dropdown menu are:

- Boat24EURBundleBase - Boat 24h (EUR) - 25 Hours - 2.3622 Ft Excl. tax
- Boat24EURBundleBase_hotel - Boat 24h (EUR) - 25 Hours - 2.3622 Ft Excl. tax
- Boat24HUFBundleBase - Boat 24h (HUF) - 25 Hours - 787.4015 Ft Excl. tax**
- Boat24HUFBundleBase_hotel - Boat 24h (HUF) - 25 Hours - 787.4015 Ft Excl. tax
- Boat24nolimitEUR - Boat 24h (EUR) (nolimit) - 25 Hours - 12.5984 Ft Excl. tax
- Boat24nolimitEUR_hotel - Boat 24h (EUR) (nolimit) - 25 Hours - 13 Ft Excl. tax
- Boat24nolimitHUF - Boat 24h (HUF) (nolimit) - 25 Hours - 4,724.4097 Ft Excl. tax

17 Click 'ADD' button to finish the process.

	U.P. (net)	Qty	Disc.	
<input type="text"/>	787.4015	1	0 %	ADD

CLONE **DELETE**

18 here you can check the details of the products/services you handle in the invoice.

Commission deduction

Marked for storno

Payment Tranz. id

Group

Description

Boat24HUFBundleBase - Boat 24h (HUF)

DiscountHours

DiscountPercent

Free-text item, type:

Predefined products/services to sell

DiscountHours

DiscountPercent

19 By using the dropdown shown in the picture you can add other products/services.

The screenshot shows a software interface with a menu bar at the top containing options like 'Prods...', 'MRP', 'Projects', 'Comm...', 'Billing...', 'Banks...', 'HRM', 'Agenda', 'Tickets', 'Tools', 'NTAK', 'Simple...', 'Group...', 'Storage', 'BBus', and 'Financ...'. The main area contains a form for product details with fields for 'Description', 'VAT', 'U.P. (net)', 'Qty', 'Disc.', and 'Total (excl.)'. A dropdown menu is open, showing a list of products with their descriptions, VAT rates, and prices. An orange circle highlights the dropdown arrow. Below the form are buttons for 'VALIDATE', 'CLONE', 'CONVERT INTO TEMPLATE INVOICE', and 'DELETE'. At the bottom, there is a 'Linked files' section with a table of files and an 'Actions on invoice' section with a table of actions.

Description	VAT	U.P. (net)	Qty	Disc.	Total (excl.)
Boat24HUFBundleBase - Boat 24h (HUF)	27% (27)	787.4015	1		787

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Ref.	By	Type	Title	Date
None				

20 Choose the product/service you want to add.

The screenshot shows a software interface with a menu bar at the top containing options like 'Prods...', 'MRP', 'Projects', 'Comm...', 'Billing...', 'Banks...', 'HRM', 'Agenda', 'Tickets', 'Tools', 'NTAK', 'Simple...', 'Group...', 'Storage', 'BBus', and 'Financ...'. The main area contains a form for product details with fields for 'Description', 'VAT', 'U.P. (net)', 'Qty', 'Disc.', and 'Total (excl.)'. A dropdown menu is open, showing a list of products with their descriptions, VAT rates, and prices. An orange circle highlights the dropdown arrow. Below the form are buttons for 'VALIDATE', 'CLONE', 'CONVERT INTO TEMPLATE INVOICE', and 'DELETE'. At the bottom, there is a 'Linked files' section with a table of files and an 'Actions on invoice' section with a table of actions.

Description	VAT	U.P. (net)	Qty	Disc.	Total (excl.)
Boat48EURBundleBase_hotel - Boat 48h (EUR) - 49 Hours - 3.1496 Ft Excl. tax					
Boat48HUFBundleBase - Boat 48h (HUF) - 49 Hours - 1,181.1023 Ft Excl. tax					
Boat48HUFBundleBase_hotel - Boat 48h (HUF) - 49 Hours - 1,181.1023 Ft Excl. tax					
Boat72EURBundleBase - Boat 72h (EUR) - 73 Hours - 3.937 Ft Excl. tax					
Boat72EURBundleBase_hotel - Boat 72h (EUR) - 73 Hours - 3.937 Ft Excl. tax					
Boat72HUFBundleBase - Boat 72h (HUF) - 73 Hours - 1,574.8031 Ft Excl. tax					
Boat72HUFBundleBase_hotel - Boat 72h (HUF) - 73 Hours - 1,574.8031 Ft Excl. tax					

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Ref.	By	Type	Title	Date
None				

21 Type in the quantity of the product/service you want to add.

VAT	U.P. (net)	Qty	Disc.	Total (excl.)
27% (27)	787.4015	1		787

<input type="text"/>	1,574.803	<input type="text" value="1"/>	0%	ADD
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VALIDATE **CLONE** **CONVERT INTO TEMPLATE INVOICE** **DELETE**

22 Click 'ADD' button.

VAT	U.P. (net)	Qty	Disc.	Total (excl.)
27% (27)	787.4015	1		787

<input type="text"/>	22,826.77	<input type="text" value="1"/>	0%	ADD
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VALIDATE **CLONE** **CONVERT INTO TEMPLATE INVOICE** **DELETE**

23 Click "VALIDATE" to finish the process.

The screenshot shows a software interface for managing invoices. At the top, there is a search bar on the left and a summary area on the right displaying '27% (27)' with a dropdown arrow, a white input field, a white box containing the number '1', and a white box containing '0 %'. A purple button labeled 'AD' is partially visible on the far right. Below this, three purple buttons are arranged horizontally: 'VALIDATE' (with an orange circle around it), 'CLONE', and 'CONVERT INTO TEMPLATE INVOICE'. Underneath these buttons is the heading 'Actions on invoice'. At the bottom, there is a table with a header row containing 'Ref.', 'By', 'Type', 'Title', and 'Date' (with a small upward arrow). The first row of the table has the value 'None' under the 'Ref.' column. On the left side of the table, there is a timestamp '1/27 14:15' and a trash icon.

24 Click "Yes"

The screenshot shows a 'Validate invoice' dialog box overlaid on a blurred background. The dialog box has a title bar with the text 'Validate invoice' and a close button (an 'x' in a square). The main content of the dialog box contains two lines of text: 'Are you sure you want to validate this invoice with reference FA2405-0003?' and '@ No automatic email notifications are planned for this event type and company'. At the bottom right of the dialog box, there are two buttons: 'Yes' (with an orange circle around it) and 'No'. The background behind the dialog box is a blurred view of a table with a header row that includes the text 'Already paid (without credit)'. The table below the header has several empty rows.

25 Click "ENTER PAYMENT"

▲ Boat24HUFBundleBase - Boat 24h (HUF)
DiscountHours 27%
DiscountPercent

📁 bcard96huf - Budapest card 96h (HUF)
DiscountHours 27%
DiscountPercent

MODIFY SEND EMAIL **ENTER PAYMENT** CLASSIFY 'ABANDONED' CREATE CREDIT

Linked files Action

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26 Type in or click the autofill the Payment amount.

Remaining amount, original currency	Payment amount, original currency	Amount (inc. tax)	Received	Remaining amount to take	Payment amount
		5,000	0	5,000	↵ <input type="text"/>
		14,000	0	14,000	↵ <input type="text"/>
		29,990	0	29,990	↵ <input type="text"/>
		48,990	0	48,990	

Replacement invoices as "Paid" when payment is done entirely.

PAY

27 Type in or click "Now" to fill the date field.

RP Projects Comm... Billing ... Banks ... HRM Agenda Tickets Tools NTAK Simple... Group ... Storage BBus Financ...

Enter payment received from customer

Company **Általános Vevő / General Customer**

Date **Now** Invoice date

Payment method **Credit card**

Account to credit **Gránit_HUF**

Number (Cheque/Transfer N*)

Sender (Check/Transfer sender)

Bank (Bank of Cheque)

Comments

28 Click "PAY" button.

	5,000
	14,000
	29,990
	48,990

Classify automatically all standard, down payment or replacement invoices as "Paid" when payment is done entirely.

PAY

29 Choose "Yes" and click "VALIDATE" button.

14,000	0	14,000	14000
29,990	0	29,990	29990
48,990	0	48,990	

Yes ▼

VALIDATE