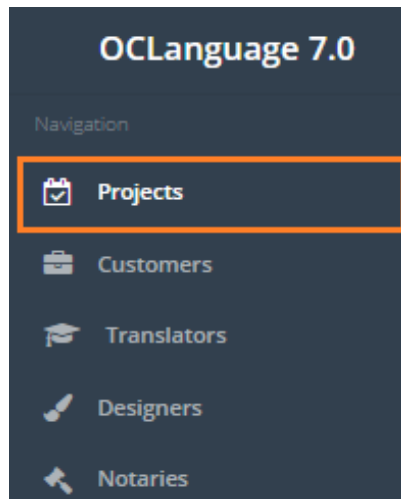


7.7. How to issue invoice for project

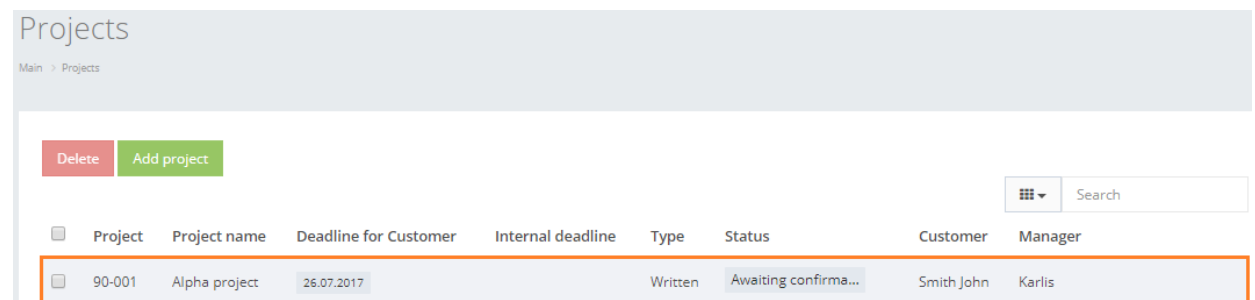
The system allows the user to create many tasks for the translation project. However, in the background it is still possible to issue various types of invoices. The system allows issuing one or several invoices for one project. Everything is tailored to the Customer's needs.

The manager should take the following steps to issue an invoice for the project:

1. Under the main menu click "Projects".

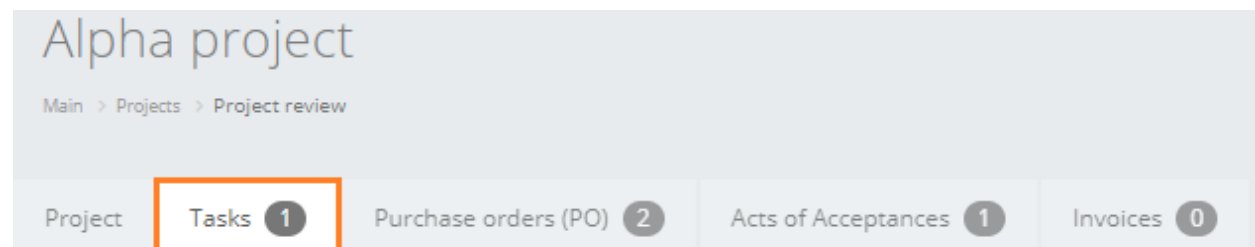


2. Click the project you want issue an invoice for.



3. The system will open a general window of project management. Mark all needed tasks to be included in the invoice. If the user wants to issue the invoice for the whole project, then it simply needs to include all tasks in the invoice. To include a task in the invoice, go through the following steps:

- 3.1. Click "Tasks" sheet.



- 1.2. Click check box icon to open task data.

Alpha project
Main > Projects > Project review

Project Tasks **1** Purchase orders (PO) **2** Acts of Acceptances **1** Invoices **0**

Notary approval ▼ ×

[Add task](#)

1.3. Check box “Include task in invoice and act”.

Include task in invoice and act

1.4. Click “Save”. The system will reload a project data window.

Include task in invoice and act

Completed

[Add task](#)

[Save](#) [Issue agreement](#) [Issue invoice](#) [Delete](#)

After the user has marked all tasks, that he wants to include in the invoice, click “Issue invoice” in the general project management window.

! Please note that “Issue invoice” option is available in all project management sheets (Project, Task, Acts of Acceptances, Invoices).

Alpha project
Main > Projects > Project review

Project Tasks **1** Purchase orders (PO) **2** Acts of Acceptances **1** Invoices **0**

#	Issuance date	Payment deadline	In total

[Save](#) [Issue agreement](#) [Issue invoice](#) [Delete](#)

5. The system will supply the manager with pre-invoice window. Review all data in pre-invoice window and make corrections, if needed. See below the description of pre-invoice window fields.

Field	Description
Name	Invoice name
Number	Unique invoice number – this parameter is adjusted to the translation agency’s internal standards
Invoice date	The system automatically supplies the user with actual date, however, the user is able to change this date
Order deadline	Deadline for project submission to the Customer
Payment due date	The system automatically counts payment due date based on the formula: Invoice date plus credit days for the Customer
Contact person	Contact person of the Customer
Payor	Customer’s name, surname (Individual) or Company name (Legal entity)
Personal code	Individual’s personal code
Registration No.	Legal entity’s registration number
Address	Individual’s address
Legal address	Company’s legal address
Actual address	Company’s actual address
Job name	Job name coincides with the task name. If the user wants to change the job name, it can be done in details window of the particular task.
No discount available	The system will say “Yes”, if a particular task does not receive discount. System will say “No”, if a particular task receives discount.
Unit	Unit of measurement
Amount	Unit amount
Price	Price per 1 unit
Total, currency	Total price of every task
Total	Total price of all tasks
Discount applicable	Total amount, from which discount will be calculated
Discount	Discount amount. The user is able to set the discount either in percentage or in amount. “(Customer discount)” – this hint reveals general discount amount for the particular Customer.

	<p>Number in field right to “Discount” box reveals predefined discount for this project (the user defines it in project details):</p> <p>(Customer discount: 4%) <input type="text" value="Discount"/> % <input type="text" value="2.00"/></p>
Total with discount	Total amount with discount
VAT	VAT rate – choose from available rates. Additional rates are set up upon request to OCLanguage support team
Total	Total amount for payment
Invoice signed by	<p>Choose a representative of translation agency, who will be signing the invoice.</p> <p>! Please note that the system will include translation agency manager in this list only if it has the authority of signing invoices (user rights can be edited in “Users” section).</p>

7. To finish the creation of invoice click "Save new invoice".

Invoice signed by

8. The system will lead the user to general project management window. If the invoice was saved, the system would reveal the text message "Added successfully!".

Added successfully!

Alpha project

Main > Projects > Project review

Project Tasks **1** Purchase orders (PO) **2** Acts of Acceptances **1** Invoices **1**

Project #

To view the invoice, take either of following 2 steps:

1. In particular project click "Invoices".

Alpha project

Main > Projects > Project review

Project Tasks **1** Purchase orders (PO) **2** Acts of Acceptances **1** **Invoices **1****

2. Open "Invoices" database (in the main menu click "Documents" -> "Invoices").

