



Copying Invoices

Only ad hoc/manual invoices can be copied. Open the invoice from the Accounts View, there is a Copy button at the top of the form

The screenshot shows the 'Accounts' view in a software application. On the left, a sidebar lists 'Macellaneous', 'Accounts', 'Contact Events', and 'Alternative Inv. Address'. The 'Accounts' section is active, displaying a list of invoices. The top invoice is selected, showing details for 'Sales Account GAL002 Galaxy Media Corporation PLC Invoice 19755'. The 'Copy' button is highlighted in the top right of the invoice form.

This opens the Invoice form attached to the same account and filled with the same details as the original

The screenshot shows the 'Invoice' form for account 'GAL002'. The form is filled with details from the original invoice, including the date '01/12/2022', their ref 'L45', and a description 'Invoice for work completed'. The 'Save as Template' button is visible at the bottom.

What if you want to use it for a different account? From 2.22.9+ you can use the Save As Template button on the invoice form and give it an appropriate name



Then got to the other company record and on the Accounts view use the Invoice T to create a new invoice based on that template, simply select the relevant template from the list and it will populate the invoice form with the saved details.

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