



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 contains a tree view with 'Accounts' selected. The main area displays an invoice for 'GAL002 Galaxy Media Corporation PLC'. The invoice details include 'Our Ref: 13755', 'Their Ref: L45', 'Date: 01/12/2022', and 'Amount: 600.00'. A 'Copy' button is highlighted in the top right corner of the invoice form. Below the invoice details, there is a table with columns: Document, Our Ref, Date, Amount, VAT, Outstanding, Their Ref, Description, Attention of, Payment Method, and Document Date. The table contains one row: Invoice 13755, 01/12/2022, 600.00, 100.00, 600.00, L45, Invoice for vter Smith, 01/12/2022.

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 the same details as the original invoice. The 'Account' field is 'GAL002', 'Date' is '01/12/2022', 'Their Ref' is 'L45', 'Attention of' is 'Mr Smith', and 'Description' is 'Invoice for work completed'. The 'Layout' is set to 'Sales Invoice'. The form includes a table with columns: Nominal, Description, VAT Rate, and Amount. The table contains one row: 10, Shift by V Scott at the Steading on 30/11/2022, Standard, 500.00. At the bottom, there are fields for 'Gross' (600.00), 'VAT' (100.00), and 'Amount' (500.00). The 'Save as Template' button is visible at the bottom left.

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.

From:

<https://iqxusers.co.uk/iqxhelp/> - iqx

Permanent link:

<https://iqxusers.co.uk/iqxhelp/doku.php?id=ug7-32>

Last update: **2022/12/01 12:17**

