

Processing Invoices

Once an invoice is created, there are a number of states it can have before it is finalised and paid.

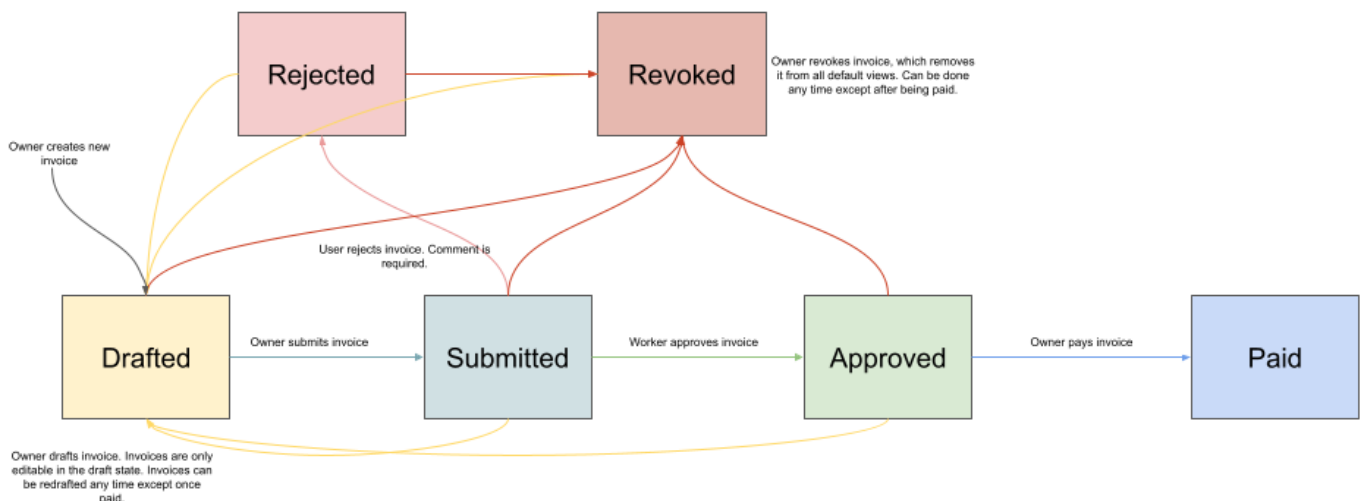
Initially, all invoices are created in the draft state. At this point, the invoice is only visible to owners, and can be edited. Once an invoice changes state, it can no longer be edited. However it can be returned to the draft state at any time, except after being marked as paid.

Once a draft is finished, it can be moved to the submitted state. At this point, the invoice is sent to the worker for approval. From here, the worker can either approve or reject the invoice. Rejecting the invoice will require the user to add a comment, and will send it back to the owner. From here the owner will need to return the invoice to draft state to make changes and continue from there.

When a worker approves an invoice it is also sent back to the owner, this time in a finalised state. It can then be marked as paid once complete.

The final state is revoked, which is for any invoices that need to be removed. Revoked invoices will be hidden from display by default, and only paid invoices are unable to be revoked. They can be restored to draft state at any time.

The below diagram outlines the flow of invoice state. You can view the state history of any invoice by clicking the "History" button from the details page.



Bulk processing is also available, which allows you to perform the same action across multiple invoices. From the Invoices landing page, select the invoices you wish to process with the checkboxes. Then use the dropdown at the top right of the table to select which action you would like to apply. A popup will confirm the action you are about to take.

A2B Staging

Adam Debono 9

My Dashboard

My Account

Workforce

Documents

Finances

Incident Reports

Messages

Configuration

Invoices

Create

worker

Teams +

11/01/2022

11/01/2022

Action Required

Clear

Filter

<input checked="" type="checkbox"/>	User	Dates	Status	
<input checked="" type="checkbox"/>	Worker Supervisor	7/10/2021 - 7/10/2021	Drafted	<div>Select... (2)<div>Submit</div><div>Pay</div><div>Export</div></div>
<input checked="" type="checkbox"/>	Worker Supervisor	1/10/2021 - 31/10/2021	Drafted	

Displaying all 2 Invoices

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