Invoices

~ BASIC ~

The tab holds the invoice header: customer, dates, delivery data, payment method and payment entry. The fields are listed in the order they appear on screen. The **clock** icon next to a date field resets the date to today.

Customer

- ***{Employee}***
- ***{Template}***
- ***{Type}***
  Invoice type. The types and their specifics are described in Invoice types.
- ***{Customer}***
  Next to the field, shows the customer's details, opens the customer's data for editing, and opens the customer's account card.
  - Selecting a **domestic partner** runs an automatic OIB check.
  - Selecting a **foreign partner** runs an automatic VAT ID check.
  - In companies using the mer intermediary, selecting a customer checks whether the customer's account is blocked; if it is, a message is shown.
- ***{Customer department}***

Temporary Customer

Frame for entering the basic data of a temporary customer.

Shipping Address

Frame for entering the shipping address when it differs from the customer's main address.

Invoice data

- ***{Number}***
  The invoice number is assigned by Brix. The third part of the number is the billing device number — see till_number. The **list** icon next to the number shows documents linked to the invoice, e.g. a job card or a quote.
  - In a department with the ***FREE_IRA*** setting enabled, the number is entered by the user, strictly as a single integer (e.g. *1234*), without the business premises code, the billing device code or any other characters. On approval Brix adds the prescribed codes (e.g. *1234/P1/1*). On an approved invoice the number is corrected with the pencil icon next to it, again without codes — see Transcript of invoices issued in other programs.
- ***{Date}***

Invoice date.

- ***{Foreign Currency}***
  In a retail department the currency is not entered and equals the company currency. In a wholesale department the currency can be chosen freely; if none is chosen, the invoice is in the company currency.
- ***{Delivered (Tax date)}***
  Date of delivery of goods or performance of the service. The invoice enters the VAT return and the balance sheet by this date, and item prices are taken from the price list as at this date — see Unit Price. The delivery date may fall in an earlier month than the invoice date.
- ***{Days}*** and ***{Payment Due}***
  Number of days of deferred payment and the payment due date. The date is calculated from the number of days.
  - When a new invoice is opened, the number of days is proposed from the customer's payment terms — see terms. If the customer has no terms, the department's default terms from the ***~ OTHER DATA ~*** tab are used.
  - The proposed value is only a starting point. A number of days entered or corrected on the invoice is kept and is no longer overwritten from the terms — not on saving, changing tabs, approving or reopening the invoice.
  - The number of days applies only to the payment terms *End of month* and *Deferral*; with other terms the field is not shown.
  - On an advance payment invoice the due days are not set.
- ***{Delivery Territory}***
  Geographic delivery territory for invoices issued to natural persons. Brix uses it to decide whether the invoice must be sent to F1 fiscalisation — see Sending invoices to F1 or F2.0 fiscalisation:
  - *Domestic* — fiscalised
  - *Other EU countries* — not fiscalised
  - *Export (Outside EU)* — not fiscalised
- ***{Business Process}***
- ***{Purchase Order/Contract}***
- ***{Draft}***
  Shown on an order from the webshop. When ticked, the order becomes a draft invoice and is no longer shown in the list with the *Ordered* status.
- ***{EU preferential origin}***
  The tick box is shown on export invoices if the company has a ***{REX}*** number entered in ~ BASIC ~. It is ticked by default.
  - If it is ticked and the customer's country has a Free Trade Agreement, the EU preferential origin clause is printed on the invoice.
  - Untick the box if the invoice contains goods not produced in the EU. The exporter is responsible for the accuracy of the origin declaration.
- ***{Courier}***
  Courier who collects and delivers the parcel with the goods from the invoice. The partners offered are those with ***{Courier}*** ticked in their partner data. The icons next to the field are the same as next to ***{Customer}***, and the × icon clears the selection.
- ***{Mass (kg)}***
  Mass of the shipment. Entered manually or automatically from a connected scale.
- ***{VAT Exemption}***
  Correcting the exemption basis on an approved invoice is described in correction.
- ***{Description}***
  Up to 80 characters.

- ***{Notes}***

Advance

A regular invoice can be linked to one or more invoices for advance payments received (RAPP). The frame is shown only if the customer has open advance payment invoices.

1. Enter all invoice items.
2. Select the advance payment and enter the ***{Amount}*** to be deducted from it. The amount cannot exceed the invoice total or the remaining open amount of the advance payment.
3. Approve the invoice. Brix automatically creates void invoices for the draft advance payments and checks that the usable amount is not exceeded.



The void of an advance payment created on approving the invoice remains a draft and must be approved manually.

When the amounts per VAT rate in the advance payment differ from those in the invoice — see rapp.

Method of Payment

- ***{Method of Payment}***
  Only the payment methods defined for the department in which the invoice is issued are offered — see ~ PAYMENT METHODS ~. If only one is entered in the department, it is filled in automatically; if there are several, one must be chosen before the invoice is saved — see Automatic filling of the payment method, bank account and card company. The payment method decides which protocol the invoice is fiscalised with, ***F1*** or ***F2.0*** — see Sending invoices to F1 or F2.0 fiscalisation.
- ***{Card Company}***
  Shown with the payment methods *Card* and *Paypal/PaymentGW*. It determines the POS terminal, i.e. the card company against which the receivable is opened.
- ***{IBAN}***
  Shown with the payment method *Bank Transfer*. Only the bank accounts entered in the department are offered; if only one is entered, it is filled in automatically — see Automatic filling of the payment method, bank account and card company.

Payment

Frame for entering a payment against the invoice into the till — see Payments against an invoice.

- ***{Till}***
- ***{Date}***
  Payment date.
- ***{Outstanding}***
  Part of the invoice amount not yet paid.
- ***{Received}***

Amount received.
- ***{Notes}***
- **PAYMENT** — Enters the payment into the till and links it to the invoice. The button is disabled if the payment has already been entered.



The payment methods *Bank Transfer*, *Paypal/PaymentGW*, *Cash on Delivery* and *Representation* are not entered into the till. For *Paypal/PaymentGW*, companies that do not keep their accounts in Brix get a bank transfer pay-in when the invoice is approved — see Payments against an invoice.

Buttons

Only the buttons valid for the current invoice status are shown.

- **SAVE** — Saves the tab data.
- **APPROVE** — Approves the invoice. Shown on a draft invoice.
- **DELETE** — Deletes the invoice. Shown on a draft invoice.
- **VOID** — Starts voiding the invoice — see Void an invoice. Shown on an approved invoice.
- **PAID F2.0** — See eReporting of invoice payments.
- **F1** — Round button in the bottom right corner; sends the invoice to F1 fiscalisation manually. It is shown only on an approved invoice that was not sent to F1 automatically, and not on invoices sent under F2.0.

Limitations

- **Delivery Territory** — On an approved or voided invoice ***{Delivery Territory}*** cannot be changed.
- **Method of Payment** — The payment method can be changed afterwards only between payment methods that are not fiscalised.
- **Delivery date in a closed VAT period** — Once a VAT period is closed, a delivery date in that period cannot be entered — see vat_period.
- **Material items** — If the invoice has material items, the delivery date cannot be earlier than today.

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