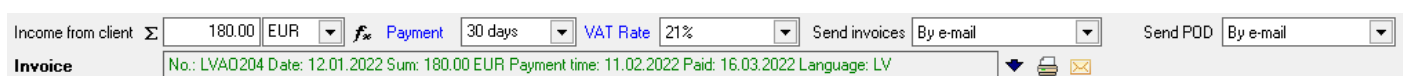


Outgoing invoice with CMR

1. **Income from the client**
2. **Issuing of invoice**
3. **Correcting an Invoice**
4. **Invoice by email or mail (with CMR)**

The invoice is issued and sent together with CMR in the Client's order window



The screenshot shows the top section of an invoice form. It includes fields for 'Income from client' with a sum symbol (Σ), a value of 180.00, and a currency dropdown set to EUR. Next to it is a 'Payment' field with a 30-day term and a 'VAT Rate' field set to 21%. There are also dropdowns for 'Send invoices' (set to 'By e-mail') and 'Send POD' (set to 'By e-mail'). Below these fields is a green bar containing invoice details: 'Invoice No.: LVAD204 Date: 12.01.2022 Sum: 180.00 EUR Payment time: 11.02.2022 Paid: 16.03.2022 Language: LV'. To the right of this bar are icons for a dropdown arrow, a printer, and an email icon.

1. Income from the client:

In the field **Income from the client** enter the total amount excluding VAT and the currency to be paid by the client.

- If the amount changes during the processing of the order, e.g. the customs declaration is purchased in addition, then the field "**Income from client**" must be updated accordingly.
- If a Credit Invoice has been issued, the "**Income from client**" **must be manually reduced by its amount.**

Summing up Σ - If pressed, the field "**Income from client**" will be filled in automatically, summing up the services related to this client order. - If this function Σ is enabled, it is not possible to fill in the field "**Income from client**" **manually.**

Payment: Outgoing invoice payment term.

- The client's default payment term can be defined: Ozols > Contacts > Lists > All partners > Open the card of the partner you want to edit > choose page **Other data** > set **Term of payment**

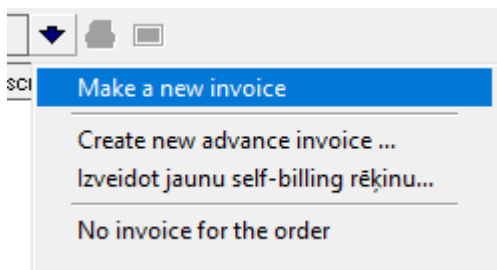
VAT rate:

- Selecting the VAT rate and then hovering over the field shows the VAT rate Article.
- VAT rates can be changed in the list: General lists > Tax list

2. Issuing of invoice

Once the order is entered, click  to create Invoice for client

- Selects the invoice type or choose from already created invoice list



The invoice template window allows you to:

- Check the information included in the invoice;
- Write notes that will be included in red at the bottom of the invoice;
- Print or Email invoice;
- Accept or cancel invoice confirmation.

Outgoing invoice - Draft

Invoice

Number: 13 Date: 09.05.2022

Client: Demo

Explanation: S23-510089

Payment: 14 days

| # | Fin.cat. | Type | Code | Name | UOM | Price | Quantity | Sum | Trip/Sped. | Order No. |
|-----|----------|---------|------|-------------------|------|---------|----------|--------|------------|-----------|
| 001 | Service | Freight | | Freight | gab. | 120.000 | 1.00 | 120.00 | | 10084 |
| 002 | Service | Freight | | Freight | gab. | 100.000 | 1.00 | 100.00 | S23 | 10089 |
| 003 | Service | Freight | | Freight | gab. | 80.000 | 1.00 | 80.00 | | 10090 |
| 004 | Service | Freight | | Freight | gab. | 120.000 | 1.00 | 120.00 | | 10091 |
| | | V.A.T. | | VAT 21% (21.00%) | | | | 88.20 | | |
| | | | | Total without VAT | | | | 420.00 | | |

Quantity: 4.0000 Sum: 508.20 EUR Rate: 1.000000000 Sum: 508.20 EUR

Manager: Veldre Janis Sent: ☐ Send invoice only by email Received: 09.05.2022

Notes: Notes written here will be included at the bottom of the invoice in red letters


Save Cancel

6 records Saved: 09.05.2022 17:07 demo LV Swed EUR

Important! If you make any changes , press F5 to overwrite the contents of the invoice.

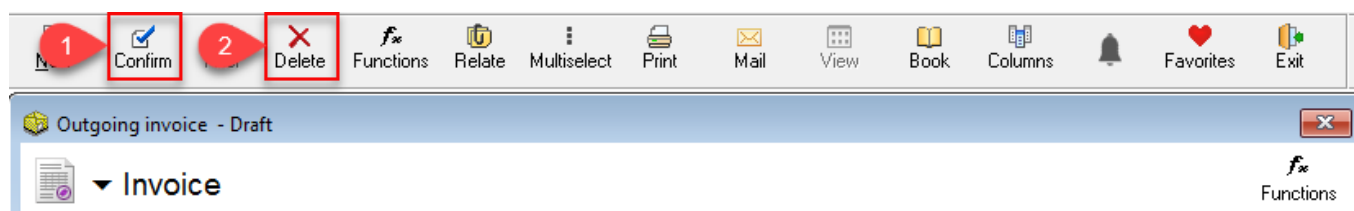
3. Correcting an Invoice

The content of the invoice is formed from the information entered in the client's order. Therefore, if you need to correct the invoice, you must correct the order and then regenerate the invoice.

If the income from client changes or additional services are added after creating the invoice, select  and **regenerate the content of the invoice**.

To delete an invoice, open the invoice template, then

1. Cancel confirmation;
2. Click Delete Invoice.



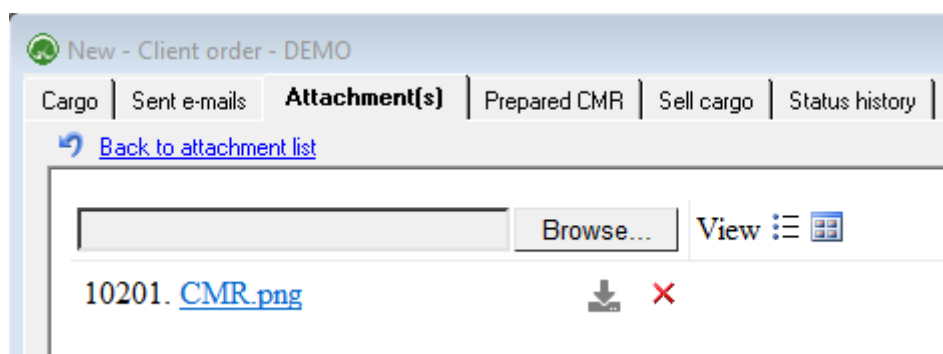
4. Invoice with CMR

OZOLS TMS has option to add CMR to clients order. If CMR is added, it is easy to e-mail it together with Invoice

The default invoice sending method is defined in the Client / Partner card.

POD or CMR

- CMR is added to the Client's order page "**Attachment(s)**" in pdf, png or jpg format



4.1. Sending an invoice by e-mail:

- In the Client Order window, open the Invoice by clicking
- To send an email: click
- The email window opens. Make sure the information is correct and if needed, the CMR is added to email. Then click **send**.
- Print the invoice by clicking . The invoice will open in pdf format in your computer's web browser.
- After sending the email, the status of the Order automatically changes to **Invoice sent**.

If the Invoice is to be emailed together with the CMR, it must be checked in the attachment before sending!

4.2. Sending an invoice by mail:

- In the Client Order window, open the Invoice by clicking
- Click to open the invoice in a web browser in pdf format and then send it to the printer for printing in paper format
- When the Invoice is sent by post, the status of the order **must be manually set to "Invoice sent"**!

If the invoice is sent by e-mail and post, this is handled as a postal mailing and the status **"Invoice sent"** must be entered manually!

