

# 13. Invoices

The **Invoices** section is designed to create, track, and manage invoices issued to clients. It allows you to monitor payment status, associate invoices with transactions, attach supporting documents, and follow the full lifecycle of each invoice from creation to settlement or expiration.

In this section, you can:

1. Create new invoices for clients
2. View and manage all existing invoices
3. Change invoice statuses
4. Search and filter invoices by multiple criteria
5. Attach and manage invoice documents
6. View related transactions and postbacks

By default, the invoice list displays all invoices you have permission to view, including their current status, client, amount, and key dates.

## Invoice List and Columns

The Invoices module displays a table of all invoices in the system with the following columns:

1. **Currency** - Invoice currency (with asset icon if applicable)
2. **Amount** - Invoice amount
3. **Project** - Linked project (clickable)
4. **Client** - Client associated with the invoice (clickable)
5. **External ID** - External or integration identifier (if provided)
6. **Description** - Invoice description (if provided)
7. **Expires At** - Invoice expiration date and time
8. **Created at** - Date and time the invoice was created
9. **Status** - Current invoice status (Pending, Paid, Overpaid, Underpaid, Expired)
10. **Actions** - Context actions such as documents, edit, and related records

Columns can be sorted by clicking on the column headers.

## Creating a New Invoice

To create a new invoice:

Click the **Add** button in the upper-right corner of the Invoices section.

In the **Add invoice** window, fill in the following fields:

**Client** - Select the client the invoice is issued to

**Currency** - Select the invoice currency

**Amount** - Enter the invoice amount

**Network** - Optional field for blockchain or payment network

**Wallet address** - Destination wallet address (if applicable)

**External ID** - Optional identifier for external systems

**Expires At** - Expiration date of the invoice

**Status** - Initial invoice status

**Comment** - Internal comment

**Description** - Invoice description or notes

Click **Save** to create the invoice.

The newly created invoice will appear in the invoice list with the selected status.

## Editing an Invoice

To edit an existing invoice:

1. Locate the invoice in the list.
2. Click the **Edit** (✎) icon in the **Actions** column.
3. Update any editable fields such as amount, expiration date, status, comment, or description.
4. Click **Save** to apply changes.

## Invoice Status Management

Invoices support multiple statuses, including **Pending**, **Paid**, **Overpaid**, **Underpaid**, and **Expired**.

To change the status:

1. Click the **Status** badge in the corresponding invoice row.
2. Select a new status from the dropdown list.

The status updates immediately and is reflected in the table.

## Searching for Invoices

Use the **Search** field located above the Invoices table to quickly find invoices by visible text fields such as client name, currency, or identifiers. The list updates in real time as you type.

“ The Search input is independent from Fast Filters. Saved filter views include only structured filters and do not store search terms.

## Filtering Invoices

To filter invoices:

Click **Select any filter** to open the filter panel.

Configure one or more of the available filters:

1. **Project** – Filter invoices by project
2. **Clients** – Filter by one or more clients
3. **Currency** – Filter by invoice currency
4. **Amount** – Filter by amount (e.g., less than a value)
5. **Status** – Filter by invoice status
6. **Created date** – Filter invoices created within a date range
7. **Wallet address** – Filter by wallet address (contains)
8. **Comment** – Filter by comment text (contains)

Click **Apply** to apply the selected filters.

To remove all filters at once, click **Drop filters**.

You can also save a filter configuration using **Create view** for reuse.

## Invoice Documents

Each invoice can have documents attached.

To manage documents:

Click the **Documents** icon in the **Actions** column.

In the **Documents** window, drag and drop a file or click **Browse** to upload it.

Supported formats include pdf, doc, docx, xls, xlsx, txt, csv, jpg, jpeg, and png.

Uploaded files appear in the documents table with file name, extension, size, creation date, and actions.

## Related Transactions

To view transactions related to an invoice:

Click the **Actions ( ⋮ )** menu in the invoice row.

Select **Related transactions**.

You will see a read-only table listing all transactions linked to the invoice, including currency, amount, type, project, account type, IDs, asset details, status, and actions.

## Related Postbacks

To view postbacks associated with an invoice:

Click the **Actions ( ⋮ )** menu in the invoice row.

Select **Related postbacks**.

The **Related postbacks** page displays all postbacks linked to the invoice, including ID, URL, status, creation date, and available actions.

The Invoices module centralizes invoice creation, tracking, and reconciliation. With powerful filtering, status management, document attachments, and direct links to related transactions and

postbacks, it provides full visibility into invoice lifecycle and payment outcomes within the Banking system.

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