

How to record a customer self-billing invoice?

Use this function when your customer uses **self-billing** — meaning that the customer creates the invoice for your services on your behalf.

In Cloudex TMS, you should still create the **Outgoing invoice** as usual so that the revenue, customer debt and related Client orders are correctly recorded in the system.

Additionally, Cloudex TMS allows you to save the invoice number assigned by the customer in the **Self-billing No** field.

This is especially useful when the customer later makes a payment using their self-billing invoice number as the payment reference.

1. How to enable self-billing for a customer?

You only need to configure this once for each customer that uses self-billing.

Go to: **Partners → Open the customer → Invoices**

1. Open the **Invoice** tab.
2. Select **Customer uses self-billing**.
3. Click the **Save** button.

After this setting is enabled, the **Self-billing No** field will become available on outgoing invoices created for this customer.

Partner : La systems GmbH

Basic data
Invoices
Sales
Notification settings
Attachment(s)
Statistics
Route price
Other

Bank account	Swift code	Bank name	Currency

Client payment days
3 days

Total credit limit
0

Bank account group

Skonto discount
0
%

Order view on invoice
1. Detailed order info

Default company
Default company

Default currency
EUR

Invoice recognition
AI prompt editor

Debtor notes
Debtor notes

Supplier payment days
5 days

Overdue credit limit
0
EUR

Max payment delay
1000
day

Skonto discount in incoming invoices
0
%

Address view on invoice
Street, Postal code, City

Default service type
Default service type

Electronic invoice format in email
Peppol

Cargo description view in invoice
Full cargo description

☐ Generate invoice automatically
☐ In currency invoices hide base currency

☒ Customer uses self-billing
☐ Show debt or overpayment on invoice

☐ Calculate penalty interest on invoices
☐ Merge selected email attachment PDF files

☐ Hide in invoice Shipper and Consignee

Saved: 21.09.2026 11:33 JanisV
Delete
Save
Cancel

2. How to enter the customer's self-billing invoice number?

Create the customer's **Outgoing invoice** in Cloudex TMS as usual.

On the outgoing invoice:

1. Find the **Self-billing No** field.
2. Enter the invoice number shown on the self-billing invoice received from the customer.
3. Click the **Save** button.

Example

Cloudex TMS outgoing invoice number: **INV-2026-01584**

Customer's self-billing invoice number: **SB-45879**

Enter **SB-45879** in the **Self-billing No** field.

The Cloudex TMS invoice number remains unchanged.

Outgoing invoice No.: 26-043 - Draft

SmartCargo Logis...

Date *	20.09.2026	Type	Invoice	Account group *	[Default]
Client *	La systems GmbH	Payment terms *	5 days	Due date *	25.09.2026
				Self-billing No	Self-billing No

Why is the Self-billing No important?

Customers that use self-billing may use **their own invoice number** when making a payment.

Saving this number in Cloudex TMS makes it easier to identify which outgoing invoice the received payment belongs to and helps with automatic or manual payment matching.

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