

# How to send outgoing invoices automatically

To generate an invoice automatically, the following criteria must be met:

1. In the client card Invoices tab has to be mark ☒ **Generate invoice automatically**
2. Order must be in status "**Delivered**" 
3. Depending on the selected "**Send inv.**" option, a POD/CMR may need to be **uploaded** and **approved** before the invoice can be generated.

|         |                                 |     |                                              |           |                 |                 |                             |
|---------|---------------------------------|-----|----------------------------------------------|-----------|-----------------|-----------------|-----------------------------|
| Income  | <input type="checkbox"/> Σ 5000 | EUR | <input checked="" type="checkbox"/> VAT rate | Term      | 3 days          | Send inv.       | <b>By e-mail (with POD)</b> |
| Invoice | Not order invoice created!      |     |                                              | Invoice + | Rate valid till | Rate valid till |                             |

| Ready to invoice                                        | POD is uploaded | POD is approved |
|---------------------------------------------------------|-----------------|-----------------|
| By e-mail (with POD)                                    | Yes             | Yes             |
| By e-mail (without POD)                                 | No              | No              |
| By e-mail (invoice upon delivery, second time with POD) | No              | No              |
| By e-mail and post (with POD)                           | Yes             | Yes             |
| By post (with POD)                                      | Yes             | Yes             |
| Don't send (Self-billing)                               | No              | No              |
| Upload to the Client Portal together with POD           | Yes             | Yes             |
| Download in Client Portal                               | Yes             | Yes             |

## Active orders

| No.    | Status                                                                              | Loading address               | Order for carrier                   | Delivery address               | Cargo descrip      | POD                                                                                  | Invoices                                                                              | Client               | Income  | Costs | Profit  |
|--------|-------------------------------------------------------------------------------------|-------------------------------|-------------------------------------|--------------------------------|--------------------|--------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|----------------------|---------|-------|---------|
| 9004   |  | LV-1024, Garkalnes; 28.12+156 | E2314;Ekg cargo VC977/P9977         | SE-813 94, Ho; 15.09+51        |                    |  |  | M.o.n.t.a SIA        | 1000.00 | 0     | 1000    |
| 9257   |  | LV-3002, Cena; 05.11+1        | E2421;Ekg cargo asdg                | DE-50996, Köln; 06.01+421      | 51 Kg; ADR 1 570°; |  |  | DHL freight latvi    | 5000.00 | 0.11  | 4999.89 |
| 9268   |  | DE-66130, Saarbrück 02.05+150 | E25AS1;Feik Logistics SIA DC977/D97 | DE-21107, Hamburg; 31.05+176   | 2.00LDM; 1 Kg;     |  |  | Acme plus            | 600.00  | 0     | 600     |
| 9267/1 |  | LV-1057, Rīga; 27.05+176      | E243;                               | ES-08040, Barcelona; 27.05+172 |                    |  |  | 1-Office UAB         | 5115.00 | 0     | 5115    |
| 9050/1 |  | EE-1021, talinn; 05.02+87     | R2303-20;Ekg cargo M9001/M9001      | SE-428 35, Källered; 08.04+149 |                    |  |  | M.o.n.t.a SIA #CL_NW | 6.02    | 3.67  | 2.35    |
| 9202   |  | LV10, Rīga; 09.09+3           | E2421;Ekg cargo asdg                | LV-1055, Rīga; 09.09           | 10.00LDM;          |  |  | Cloudex SIA          | 5090.00 | 10.84 | 5079.16 |

-  Second orange empty circle means **POD/CMR approval is expected**,
-  icon indicates that the invoice is ready to be generated **manually**,
-  icon indicates that the invoice will be generated **automatically**.

Where to find checkbox "Generate invoice automatically"

Partner : Acme plus

1

Basic data

Invoices

Sales

Notification settings

Attachment(s)

Statistics

Route price

Other

| Bank account                                                                                            | Swift code | Bank name | Currency |
|---------------------------------------------------------------------------------------------------------|------------|-----------|----------|
|  LV01HABA0123654785412 |            |           | LVL      |

Client payment days

Prepayment

Total credit limit

1000

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 paymant delay

1000

day

Skonto discount in incoming invoices

0

%

Address view on invoice

Street, Postal co...

Default service type

Default service type

Electronic invoice format in email

Electronic invoice for..

Cargo description view in invoice

Full cargo descri...

2

☒ Generate invoice automatically

☐ Customer self-billing

☐ Calculate penalty interest on invoices

☐ Hide in invoice Shipper and Consignee

☐ In currency invoices hide base currency

☐ Show debt or overpayment on invoice

☐ Merge selected email attachment PDF files

Saved: 04.08.2026 16:05 JanisV

Delete

Save

Cancel

Revision #16

Created 2026-08-04 12:18:59 UTC by Edgars Linge

Updated 2026-08-10 12:11:54 UTC by Admin