

Invoice series

By the term “**Invoice Series**” we mean a set of invoices, each of which receives a number that **uniquely identifies** it.

You can manage Invoice Series on the [Accounting Management](#) page. It is accessible from the Menu → Accounting → Management

Default setup

MediSign comes with three types of invoices:

- **Standard Invoices** for electronic invoicing.
- Invoices that are **reissues** of Invoices that have already been issued in the recent past in another way (eg manuscripts).
- **Test Invoices** for training in the use of the application (unsuitable for tax use).

When you start using MediSign, the only Invoice Series that is enabled (in use) is the “Test Invoices”.

Thus, on the Accounting Management page you will find the following configuration:

Invoice series and Numbering

Here are the available invoice series (friendly names).

Look carefully and (if necessary) modify the characteristics of each (using the Config option). Then activate the ones you need.

You can always create your own series (using the Clone option).

Invoice	Config	Clone	<input type="checkbox"/> in use
Invoice (already issued)	Config	Clone	<input type="checkbox"/> in use
Invoice (for testing)	Config	Clone	<input checked="" type="checkbox"/> in use

See below the necessary changes.

Required settings

The first Series (“Invoice”) is always required in production use. Click “Config” and make the desired changes, as shown below

Configure invoice series (#1)

Invoice type

Invoice for customer charge in USD.

Series type (What the series includes)

Standard invoices for electronic invoicing.

Series friendly name

What will be the title of the invoice

INVOICE

The following items can only be modified before invoices are issued.

Series name (e.g. A, B, C etc)

Start from number

The Series name is only necessary if you have set more than one invoice series of the same type.

The Series name, if any, is printed in front of the invoice number e.g. A005 or A12334.

- ☒ Continuous serial numbering all years
☐ Restart numbering on the first day of the year by the number:

Number last issued

No invoices have been issued

Date last issued

No invoices have been issued

[Need help?](#)

Then enable the first Series ("Invoice").

If you don't need Test invoices anymore, you can disable them.

So, the new configuration will seem like this:

Invoice series and Numbering

Here are the available invoice series (friendly names).

Look carefully and (if necessary) modify the characteristics of each (using the Config option). Then activate the ones you need.

You can always create your own series (using the Clone option).

Invoice	Config	Clone	<input checked="" type="checkbox"/> in use
Invoice (already issued)	Config	Clone	<input type="checkbox"/> in use
Invoice (for testing)	Config	Clone	<input type="checkbox"/> in use

Create your own series

You can make your own Series from the “**Clone**” button next to each available Series on the Account Management page.

Creating your own Series is an option you will **rarely** need.

For example, you could use multiple Invoice Series if your customers are somehow distinguished into groups.

Related topics

- [Accounting Management](#)

From:
<https://docs.medesign.com/> - docs.medesign.com

Permanent link:
<https://docs.medesign.com/manual/invoice-series>

Last update: **2021/08/15 09:03**

