Invoice Subtypes

Introduction

This page is where Invoice Subtypes can be created and/or managed. Invoice Subtypes are used primarily for categorizing invoices when they are generated. To reach the Invoice Subtypes, click on the Admin dropdown and click on settings, once on the settings page click on the Invoice Subtype to open the page.

Invoice Subtypes

As stated before, invoice subtypes are used to categorize invoices for easier sorting and organization. When reaching the page, all subtypes will be shown as a table with each type being a line item and with the following columns,

- Type - The Name and Type of of the Subtype Invoice created
- Status - The status of the type whether it be active or inactive
- Actions - Actions that can be taken on the type such as
  - Edit - Clicking here allows for subtypes to be edited
  - Status - Shows the status of the subtype and clicking allows to change from active to inactive
  - Trash - Clicking here deletes the the subtype

Creating an Invoice Subtype

Creating an Invoice Subtype is easy and can be done by clicking on the Add Invoice Subtype button. Once clicked, the Add Invoice Subtype popup will appear with one field needing to be filled out, the Type. The type is name of the type being created, once filled out, clicking on the create button will create the subtype. To active, just click on the status button under the actions part of the line item.

Editing an Invoice Subtype

Editing an Invoice Subtype is easy and follows the same process of adding one. To do so, click on the edit button under actions on the Subtype that needs editing. The Edit Invoice Subtype popup will appear which is the same as the Add Invoice Subtype. After editing the field, click on the Update button to update the edited page. Clicking on cancel will void out any changes and close

the popup.

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