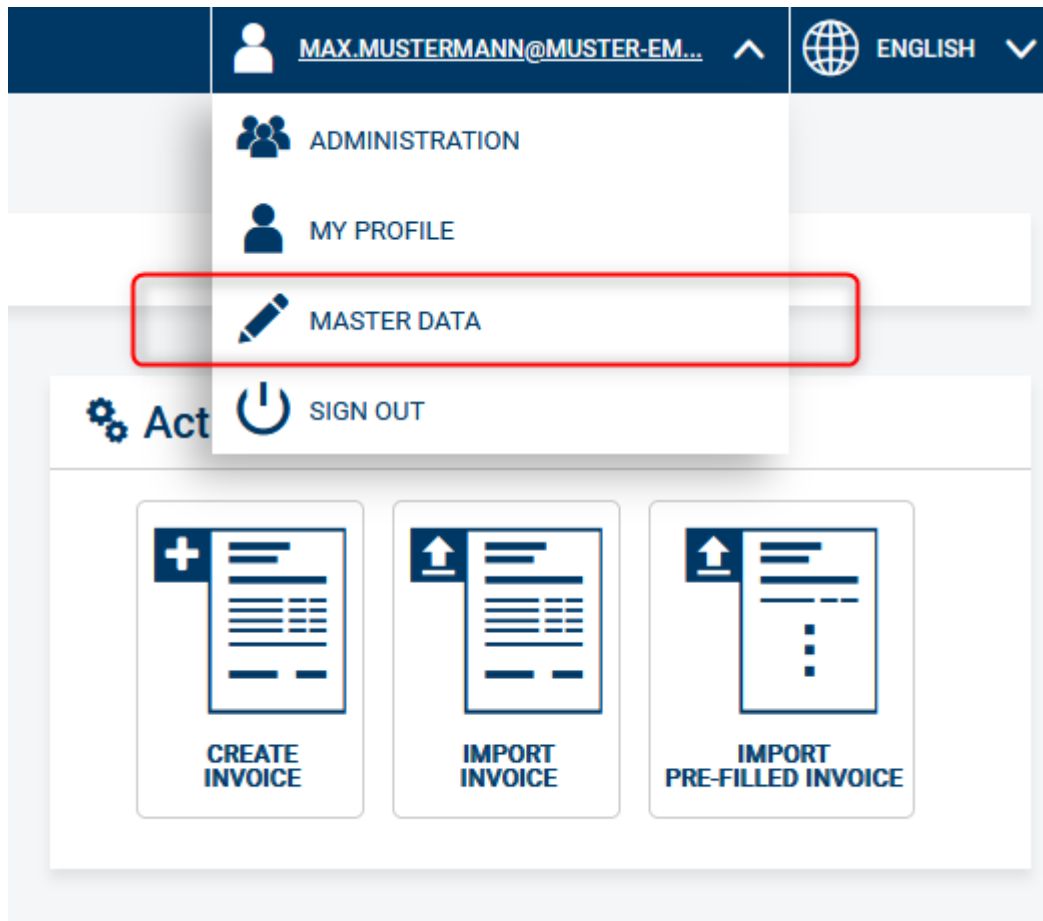


Master data

- [Introduction](#)
- [Create master data](#)
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 - [Dashboard / Create invoice](#)
 - [Invoice / Invoice overview](#)
 - [Invoice / Biller information](#)
 - [Invoice / Payment method](#)

Introduction

You can permanently store your user data in the master data management. The automatic transfer of your master data into new invoices or the transfer into imported or already existing invoices saves you typing work and time. You will find the master data management in the header as a navigation entry under your user name.



The transfer of your stored master data is possible on the following subpages:

- **Invoice overview** - all master data are taken over
- **Invoicing party** - only the master data of the invoicing party are transferred
- **Payment method** - only the master data of the payment type is transferred

Create master data

Please enter your master data here. A separate master data record is used per user. You do not have to fill in all fields. Only the filled fields will be included in the invoices.

After entering, you can save the master data (1) or discard the entered data and navigate to the start page (2).



SAVE



GO TO HOME PAGE

Master data

Information on invoicing party

Company name

Email

Invoicing party's address

Street / number

P. O. Box

State

Post code

Place

Country

Invoicing party's contact details

Name

Telephone

E-mail

Tax information

VAT ID

Tax file number

Information on payment method

Payment reference

Payment terms, e. g. early payment allowance

Payment method

Please select a payment method

Bank transfer: ☒ SEPA ☐ non-SEPADirect debit: ☐ SEPA ☐ non-SEPA

Bank transfer SEPA

BANK TRANSFER SEPA - 1

IBAN

Account holder

BIC



DELETE



ADD BANK TRANSFER

Transfer master data to the invoices
Dashboard / Create invoice

The previously entered master data is automatically transferred to new invoices (1). For imported or already existing invoices, the master data transfer must be initiated by user.


Invoices overview

i Tips


New Features:

- Multi-user management
- Master data
- Advanced mode
- Define individual sales tax rate
- Specific features of invoices for DB


Actions




CREATE INVOICE



IMPORT INVOICE



IMPORT PRE-FILLED INVOICE





Invoice / Invoice overview


On the "Invoice overview" page, you can transfer the complete master data to the invoice (1). Already existing entries will be overwritten.

INVOICE NUMBER:
No data saved.

MODE:
STANDARD

 SAVE


 ACTIONS ▾

 EXIT INVOICE

INVOICE OVERVIEW

- INVOICE RECIPIENT
- INVOICING PARTY
- INVOICE DETAILS
- DELIVERY
- ITEMS
- TOTAL AMOUNTS
- PAYMENT METHOD
- ATTACHMENTS / REFERENCES
- GENERATE INVOICE

Invoice overview



Invoice recipient's address

Buyer reference

Buyer

Street / number

P. O. Box

Post code

Place

State

Country DE

[Go to module Invoice recipient ►](#)

Invoicing party's address

Company name Muster GmbH inh. Max Mustermann

Street / number Musterstraße 1

P. O. Box 11


Post code 11111

Place Musterstadt

State NRW

Country DE

[Go to module Invoicing party ►](#)



Invoice / Biller information

You can transfer the invoicing party information from your master data here (1). Already existing entries will be overwritten.

INVOICE NUMBER:

No data saved.

MODE:

STANDARD

SAVE

ACTIONS

EXIT INVOICE

INVOICE OVERVIEW

INVOICE RECIPIENT

INVOICING PARTY

INVOICE DETAILS

DELIVERY

ITEMS

TOTAL AMOUNTS

PAYMENT METHOD

ATTACHMENTS / REFERENCES

GENERATE INVOICE

Information on invoicing party

TRANSFER MASTER DATA

Information on invoicing party

Company name

Muster GmbH inh. Max Mu:

Email

info@muster-email.de

Creditors

No creditor number saved.

ADD CREDITOR

Invoicing party's address

Street / number

Musterstraße 1

P. O. Box

11

State

NRW

Post code

11111

Place

Musterstadt

Country

Germany

Invoice / Payment method

To take over the payment types from your master data, please click on the button "Transfer master data" (1). Already existing entries will be overwritten.

INVOICE NUMBER:

No data saved.

MODE:

STANDARD

SAVE

ACTIONS

EXIT INVOICE

INVOICE OVERVIEW

INVOICE RECIPIENT

INVOICING PARTY

INVOICE DETAILS

DELIVERY

ITEMS

TOTAL AMOUNTS

Payment method

TRANSFER MASTER DATA

Information on payment method

Payment reference

Rechnung / Gutschrift

Payment terms, e. g. early payment allowance

Bitte überweisen Sie den erforderlichen Betrag auf das angegebene Konto.