Pathway Invoices

How to create an Invoice Template

The Invoice template is used when:

- A Pathway Administrator selects a Pathway Invoice Step from the Toolbox and
- when the learner generates the invoice from the pathway on the LMS portal.

Invoice Template Page

How did I get here? System Administration | Modules | e-Learning | Master Data | Invoice Template

On the Invoice Template screen, click on the Create button. Only one invoice template can be created.

Zoom:

Invoice Template Detail

Zoom:

Click here for more information on How to use an Invoice Step. This article also shows what the learner when see when generating the invoice.

Overview of Fields

Field	Overview
Invoice Number Format	Number formats explained: The following placeholders can be used: • Dates: y, yy, yyyy, M, MM, MMM, MMMM, d, dd • Times: H, HH, hh, m, mm, s, ss, t, tt • Numbers: 00, 000, 0000, 00000 To prevent replacement for above mentioned placeholders, prefix with \\ Examples: yyINV000: 18INV026 (invoice 26, year 2018) MMM-0000_HHmm: Feb-0002_1649 (invoice 2, February, 4:49 PM) \\M\\yINV_000: MyINV_894 (invoice 894, placeholders escaped)
Company Information	More information about the company who is issuing the invoice.
Bank Details Description	Banking Details of the company who is issuing the invoice.
Footer Description	Footer description on the Invoice.
Invoice Number Description	Text displayed next to the invoice number.
Invoice Date Description	Text displayed next to the invoice date.
Client Contact Description	Text displayed next to the client contact description.
Client Description	Text displayed next to the client description.
Client Vat Description	Text displayed next to the client vat description.

Saved Invoice Template

Once the invoice template is saved, it can be edited again if required.

Zoom:

Try It Out: Navigate to the Invoice Template screen and create or update the invoice template.

How to mark an Invoice Step as paid

How did I get here? System Administration | Module | e-Learning | Learning Management | Maintain Pathway Invoice

Maintain User Invoice

Zoom:

Focus: To update the Invoice status to Paid complete the numbered steps.

The Invoice Status can have one of three values: Paid, Cancelled, Not Paid.

Click on the View Invoice hyperlink to view a copy of the invoice generated for the learner.

Click here to View the Invoice Step as a User.

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