How to Update the Status of a Customer Invoice

Modified on: Thu, March 6, 2025 at 2:51 PM

Navigation Menu: Billing > Customer Invoices

TIP: To optimize platform functionality, use Google Chrome.

Overview

Prerequisite: The invoice has been generated. Click this link for instructions: **How to Generate Customer Invoices** https://stream1.freshdesk.com/support/solutions/articles/44002357719-how-to-generate-customer-billing-statements-sie-invoices-)

By default, the invoice is displayed in **draft status.** Invoices in **draft status** are not visible to the customer from the Customer Marketplace (or end-customer portal).

Customers can view invoices in Open, Voided, and Closed statuses by selecting the **Invoice** option in the end-customer portal menu.

Invoice Features

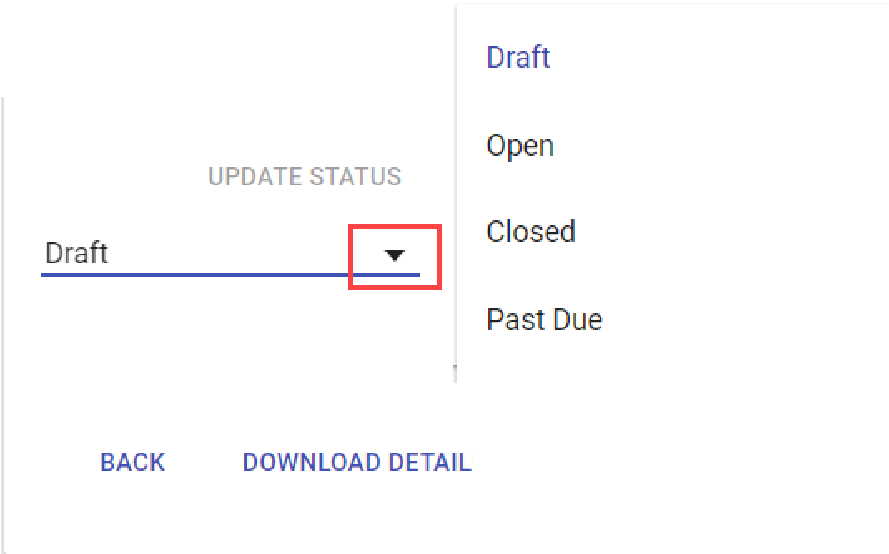
- **Document ID:** number assigned by the platform when generating invoices
- **[Status]** Identified at the top center of the document
- **Billing Period:** dates that appear at the top center of the document, below status
- **Currency designation**: located in the upper right corner. From the dropdown list, you can view currencies, as applicable.
- **Custom fields** (if configured in your account)
- **Download options**: Depending on the cloud provider, you will see several download file type options: PDF, CSV, Detailed CSV, and Print
- **Discard:** deletes the document
- **Update invoice status**: changes the status of an invoice.
- **Expand and collapse** sections by clicking on the blue bar areas of the displayed document.

Note: once you change a status from D**RAFT t**o O**PEN,** the draft status will no longer be available.

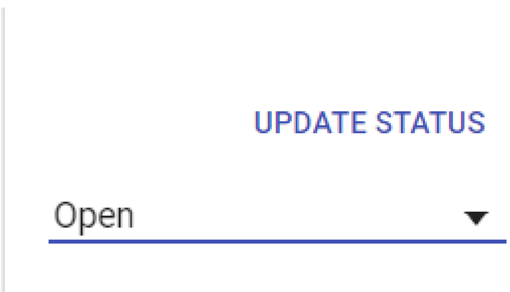
Changing the status of an invoice when generating it

When you first generate an invoice, it is in **DRAFT** status

When **viewing** the invoice, scroll down to change the status.

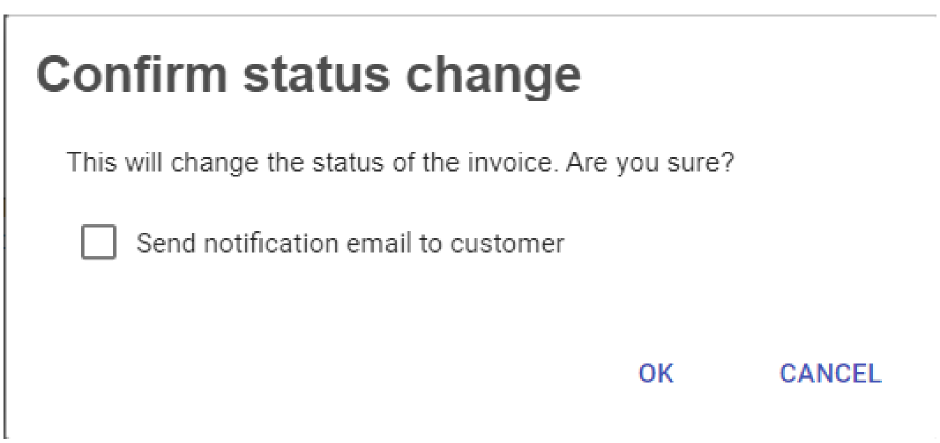


In the dropdown menu, select a status and then click **UPDATE STATUS**



The confirmation screen will appear.

- Click **Accept** to confirm the status change
- Click **Cancel** to keep the status as draft
- Activate the ***Send notification email to customer*** option to notify them that you have published the invoice on the end-customer portal

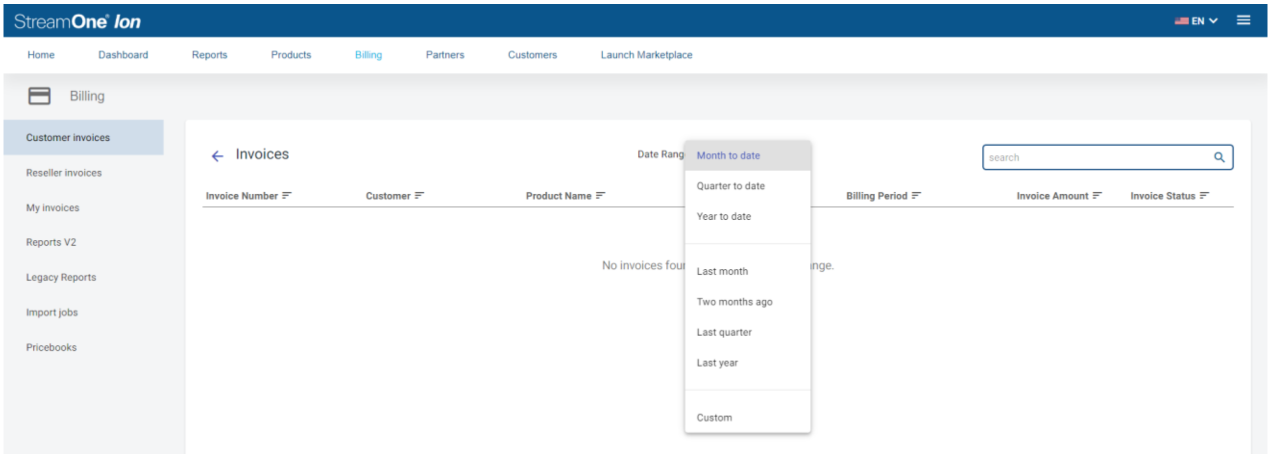


Changing the status of an existing invoice

To update a status or view an invoice or statement, follow these steps:

1. From the **BILLING** menu, select **Customer Invoices or search for** a specific customer.

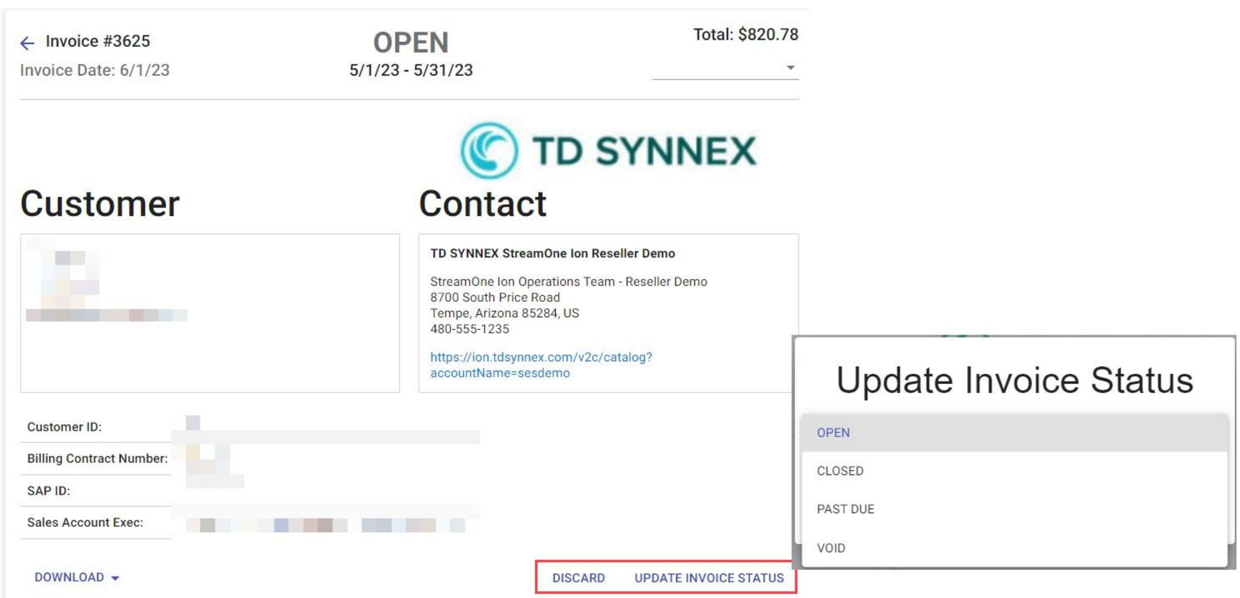
2. With a selected client, double-click to open the **invoices table.**
3. Select a **date range** for the billing period. A list of available invoices for the specified period will be displayed. You may see more than one. Each cloud provider has its own billing document.



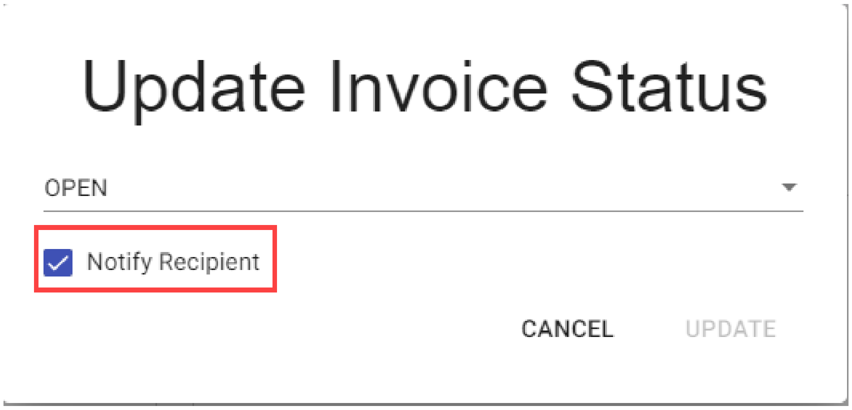
Click on the image to enlarge it.

Figure 1: View client invoices table (select date range or search).

4. Double-click an invoice to view it.
5. Click **Update invoice status,** select an option, and click U**pdate t**o apply the change. or **DISCARD** to delete the document.

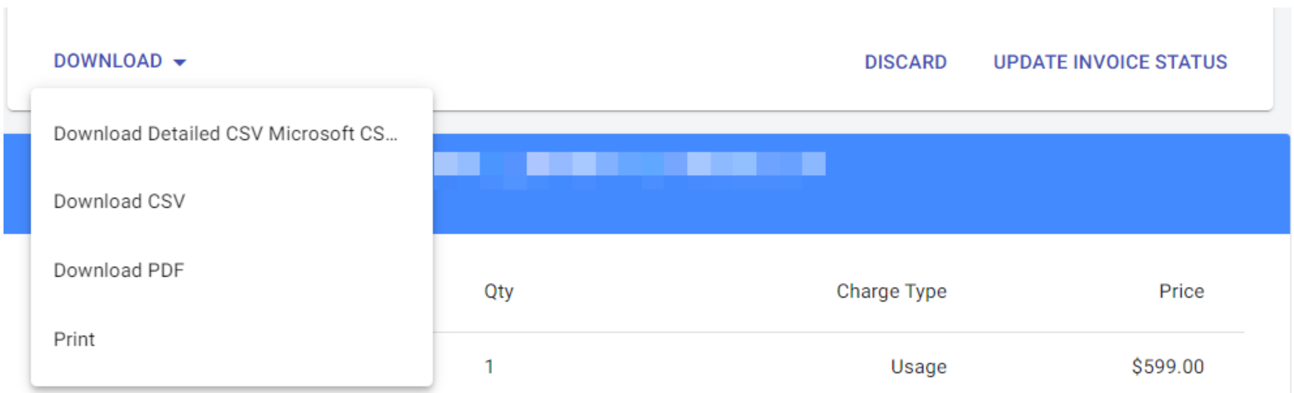


When changing the status of an existing document, the notification message is enabled by default. You can uncheck it if you do not want your client to receive an email communication.



Downloading an invoice

Depending on the cloud provider, in the DOWNLOAD dropdown menu, you will see a list of options.



Here are a couple of articles you might be interested in:

- (https://ses.freshdesk.com/sup port/solutions/articles/13000068363-how-do-i-find-the-ses-end-customer-portal-url-) (https://ses.freshdesk.com/support/solutions/articles/13000068363-how-do-i-find-the-ses-end-customer-portal-url-)How do I find theend customer portal URL? (https://stream1.freshdesk.com/support/solutions/articles/44002357728-how-do-i-find-the-sie-end-customer-portal-url-)
- **How to set up and manage end-user access and password resets** (https://stream1.freshdesk.com/support/solutions/articles/44002357716-setup-and-manage-end-user-access)

To submit a support request from the platform, click the "?" icon in the top right menu bar or click Submit a ticket (https://stream1.freshdesk.com/support/tickets/new) in the Knowledge Base . Complete all required fields or read How to use StreamOne Freshdesk to submit and view support tickets (https://stream1.freshdesk.com/support/solutions/articles/44002357755- how-to-submit-and-view-support-tickets) for more information.