

# Manage and Edit Invoices



This guide covers managing and editing invoices, including customizing views, exporting data, and bulk actions like printing and emailing. It streamlines invoicing for accurate, organized financial management.

## 1 Select "Invoices".

The screenshot shows the ONE TO ONE PLUS dashboard interface. The left sidebar contains a navigation menu with the following items: Dashboard, Sites, Assets, Students, Staff, Locations, Help Desk, Parts, **Invoices** (highlighted with a red box), Imports, Reports, and Settings. The main dashboard area displays several charts and widgets under the heading "Dashboard". The widgets include: "Assets by Type" (donut chart showing Laptop: 6,123 and Chromebook: 61); "Assets by Site" (donut chart showing QAH5: 6,129 and QADD: 170); "Assets Not Turned In by Site" (donut chart showing QAH5: 355, QADD: 64, and QAMS: 9); "Assets by Status" (donut chart showing Active: 6,305); "Assets Assigned" (donut chart showing Unassigned: 69.2% and Assigned: 0.2%); and "Assets by Funding Source" (bar chart showing Title I and E-Rate).

## 2 Select "Manage".

The screenshot shows the ONE TO ONE PLUS Dashboard. The left sidebar contains a navigation menu with the following items: Dashboard, Sites, Assets, Students, Staff, Locations, Help Desk, Parts, Invoices, **Manage** (highlighted with a red box), Add New Invoice, Add New Payment, Bulk Invoicing, Imports, Reports, and Settings. The main dashboard area displays several charts: Assets by Type (donut chart showing Laptop: 9, 103 and Chromebook: 61, iPad: 52), Assets by Site (donut chart showing QAHS: 9, 129 and QAHO: 170), Assets Not Turned In by Site (donut chart showing QAHS: 395 and QAHS: 5), Assets by Status (donut chart showing Active: 9, 309), Assets Assigned (donut chart showing Unassigned: 99.2% and Assigned: 0.8%), and Assets by Funding Source (bar chart showing Title I and E-Rate).

## 3 Select "Columns" to select fields to customize the view.

The screenshot shows the ONE TO ONE PLUS Invoices page. The top right corner features a 'Columns' button (highlighted with a red box), 'My Views', 'Export', 'Print All', 'Email All', and '+ Add New' buttons. Below these buttons, there is a 'View Applied: Standard' section and a 'Refresh Column Finder' dropdown menu. The main content is a table with the following columns: Invoice ID, Invoice Type, Description, Invoice Amount, Balance, Related User, Related User Site, and Related User Grade. The table contains 12 rows of invoice data.

Invoice ID	Invoice Type	Description	Invoice Amount	Balance	Related User	Related User Site	Related User Grade
INV-0001045929	Damaged	Bill for csv damages	25	25	Matthew Jackson (24002)	QAHS	8
INV-0001045928	Damaged	Bill for csv damages	25	25	Cristian Kagay (24001)	QAHS	10
INV-0001045925	Damaged	Bulk invoice for damages to computer	25	15	Abner Dawit (D1109056)	QAHS	12
INV-0001045924	Damaged	Bulk invoice for damages	25	15	Aaron Justin Dano (D1907197)	QAHS	11
INV-0001045923	Damaged	Bulk invoice for damages	25	25	Abby Culpepper (C1111348)	QAHS	11
INV-0001045922	Damaged	Bulk invoice for damages for chromebook	25	25	Abril Castro (C1109261)	QAHS	9
INV-0001045921	Damaged	Bulk invoice for damages	25	25	Abigail Perkins (C1101826)	QAHS	12
INV-0001045920	Damaged	Bulk invoice for damages	25	25	Abigail Bahamonde (B1201149)	QAHS	10
INV-0001045929	Damaged	damages	50	50	Joseph Owen (23)	QAHS	12
INV-0001045927	Damaged	missing keys	50	50	Jack Morton (240212184)	User Departments/Management	1
INV-0001045924	Damaged	chromebook	139	99	Sara Lancaster (77)	QAHS	1A
INV-0001045922	Damaged	damages	50	50	ethan davenport (E00003)	User Departments/Development	12

## 4 Select "My Views" to save your customized views.

The screenshot shows the ONE TO ONE PLUS Invoices page. The 'My Views' button is highlighted with a red box. The page displays a table of invoices with columns for Invoice ID, Invoice Type, Description, Invoice Amount, Balance, Related User, Related User Site, and Related User Grade. The table contains 12 rows of data.

Invoice ID	Invoice Type	Description	Invoice Amount	Balance	Related User	Related User Site	Related User Grade
INV-0001045928	Damaged	Bill for csv damages	25	25	Matthew Jackson (24002)	QAHS	8
INV-0001045928	Damaged	Bill for csv damages	25	25	Cristian Kagay (24001)	QAHS	10
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INV-0001045922	Damaged	Bulk invoice for damages for chromebook	25	25	Abril Castro (C1109261)	QAHS	9
INV-0001045921	Damaged	Bulk invoice for damages	25	25	Abigail Perkins (C1101636)	QAHS	12
INV-0001045920	Damaged	Bulk invoice for damages	25	25	Abigail Bahamonde (B1201148)	QAHS	10
INV-0001045929	Damaged	damages	50	50	Joseph Owen (23)	QAHS	12
INV-0001045927	Damaged	missing keys	50	50	Jack Morton (240212184)	User Departments/Management	1
INV-0001045924	Damaged	chromebook	139	99	Sara Lancaster (77)	QAHS	1A
INV-0001045922	Damaged	damages	50	50	ethan davenport (E00003)	User Departments/Development	12

## 5 Select "Export" to generate a CSV file.

The screenshot shows the ONE TO ONE PLUS Invoices page. The 'Export' button is highlighted with a red box. The page displays a table of invoices with columns for Invoice ID, Invoice Type, Description, Invoice Amount, Balance, Related User, Related User Site, and Related User Grade. The table contains 12 rows of data.

Invoice ID	Invoice Type	Description	Invoice Amount	Balance	Related User	Related User Site	Related User Grade
INV-0001045929	Damaged	Bill for csv damages	25	25	Matthew Jackson (24002)	QAHS	8
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INV-0001045927	Damaged	missing keys	50	50	Jack Morton (240212184)	User Departments/Management	1
INV-0001045924	Damaged	chromebook	139	99	Sara Lancaster (77)	QAHS	1A
INV-0001045922	Damaged	damages	50	50	ethan davenport (E00003)	User Departments/Development	12

## 6 Select "Print All" to print all selected invoices.

The screenshot shows the 'Invoices' page in the ONE TO ONE PLUS system. The page header includes a search bar and navigation options like 'Columns', 'My Views', 'Export', 'Print All', 'Email All', and 'Add New'. The 'Print All' button is highlighted with a red box. Below the header is a table of invoices with columns for Invoice ID, Invoice Type, Description, Invoice Amount, Balance, Related User, Related User Site, and Related User Grade. The table contains 12 rows of data, including details for various damaged items like 'Bill for csv damages', 'Bulk invoice for damages to computer', and 'missing keys'.

Invoice ID	Invoice Type	Description	Invoice Amount	Balance	Related User	Related User Site	Related User Grade
INV-0001045928	Damaged	Bill for csv damages	25	25	Matthew Jackson (24002)	QAHS	8
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INV-0001045920	Damaged	Bulk invoice for damages	25	25	Abigail Bahamonde (B1201148)	QAHS	10
INV-0001045929	Damaged	damages	50	50	Joseph Owen (23)	QAHS	12
INV-0001045927	Damaged	missing keys	50	50	Jack Morton (240212184)	User Departments/Management	1
INV-0001045924	Damaged	chromebook	139	99	Sara Lancaster (77)	QAHS	1A
INV-0001045922	Damaged	damages	50	50	ethan davenport (E00003)	User Departments/Development	12

## 7 Select "Email All" to email all selected invoices.

The screenshot shows the 'Invoices' page in the ONE TO ONE PLUS system. The page header includes a search bar and navigation options like 'Columns', 'My Views', 'Export', 'Print All', 'Email All', and 'Add New'. The 'Email All' button is highlighted with a red box. Below the header is a table of invoices with columns for Invoice ID, Invoice Type, Description, Invoice Amount, Balance, Related User, Related User Site, and Related User Grade. The table contains 12 rows of data, including details for various damaged items like 'Bill for csv damages', 'Bulk invoice for damages to computer', and 'missing keys'.

Invoice ID	Invoice Type	Description	Invoice Amount	Balance	Related User	Related User Site	Related User Grade
INV-0001045929	Damaged	Bill for csv damages	25	25	Matthew Jackson (24002)	QAHS	8
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INV-0001045924	Damaged	Bulk invoice for damages	25	15	Aaron Justin Dano (D1907197)	QAHS	11
INV-0001045923	Damaged	Bulk invoice for damages	25	25	Abby Culpepper (C1111348)	QAHS	11
INV-0001045922	Damaged	Bulk invoice for damages for chromebook	25	25	Abril Castro (C1109261)	QAHS	9
INV-0001045921	Damaged	Bulk invoice for damages	25	25	Abigail Perkins (C1101636)	QAHS	12
INV-0001045920	Damaged	Bulk invoice for damages	25	25	Abigail Bahamonde (B1201148)	QAHS	10
INV-0001045929	Damaged	damages	50	50	Joseph Owen (23)	QAHS	12
INV-0001045927	Damaged	missing keys	50	50	Jack Morton (240212184)	User Departments/Management	1
INV-0001045924	Damaged	chromebook	139	99	Sara Lancaster (77)	QAHS	1A
INV-0001045922	Damaged	damages	50	50	ethan davenport (E00003)	User Departments/Development	12

## 8 Select "Add New" to add a new invoice.

The screenshot shows the 'ONE TO ONE PLUS' Invoices page. The left sidebar contains navigation options: Dashboard, Sites, Assets, Students, Staff, Locations, Help Desk, Parts, Invoices (selected), Manage, Add New Invoice, Add New Payment, Bulk Invoicing, Imports, Reports, and Settings. The main content area displays a table of invoices with columns: Invoice ID, Invoice Type, Description, Invoice Amount, Balance, Related User, Related User Site, and Related User Grade. The table shows 42 records. At the top right of the table, there are buttons for 'Columns', 'My Views', 'Export', 'Print All', 'Email All', and a red 'Add New' button. Below the table, there are options for 'Refresh', 'Column Finder', and 'Page Size' (set to 50).

## 9 Complete all required fields as well as additional helpful information.

The screenshot shows the 'ONE TO ONE PLUS' 'Add Invoice' form. The form is titled 'Add Invoice' and has a 'Save' button in the top right corner. The form is divided into three sections: 'Invoice Information', 'Invoice Details', and 'Claim History'. The 'Invoice Information' section contains fields for: Invoice ID (with a 'Leave Empty to Auto Generate' button), Invoice Date (01/14/2025), Due Amount (0.00), Related user (Select An Option), Type (Select An Option), and Description. The 'Invoice Details' section contains fields for: Due Date, Approved Date, Approved By (Select An Option), Paid In Full Date, and Ticket (Select An Option). The 'Claim History' section is currently empty. A red box highlights the 'Invoice Information' and 'Invoice Details' sections. Below the form, there are buttons for 'Add New Invoice', 'Add New Payment', and 'Bulk Invoicing'. The left sidebar is the same as in the previous screenshot.

## 10 Select "Save".

The screenshot shows the 'Add Invoice' form in the ONE TO ONE PLUS system. The form is divided into three sections: Invoice Information, Invoice Details, and Claim History. The Invoice Information section includes fields for Invoice ID, Invoice Date (01/14/2025), Due Amount (0.00), Related user, and Type. The Invoice Details section includes Due Date, Approved Date, Approved By, Paid In Full Date, and Ticket. A green 'Save' button is visible at the top right of the form.

## 11 Use one of the Search Boxes to search for invoices.

The screenshot shows the 'Invoices' list view in the ONE TO ONE PLUS system. The search bar at the top is highlighted with a red box. Below the search bar, there is a table of invoices with columns for Invoice ID, Invoice Type, Description, Invoice Amount, Balance, Related User, Related User Site, and Related User Grade. The 'Select' button in the first row is also highlighted with a red box.

Invoice ID	Invoice Type	Description	Invoice Amount	Balance	Related User	Related User Site	Related User Grade
INV-0001045929	Damaged	Bill for csv damages	25	25	Matthew Jackson (24002)	QAHS	8
INV-0001045928	Damaged	Bill for csv damages	25	25	Cristian Kagay (24001)	QAHS	10
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INV-0001045920	Damaged	Bulk invoice for damages	25	25	Abigail Bahamonde (B1201149)	QAHS	10
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INV-0001045927	Damaged	missing keys	50	50	Jack Morton (240212184)	User Departments/Management	1
INV-0001045924	Damaged	chromebook	139	99	Sara Lancaster (77)	QAHS	1A
INV-0001045922	Damaged	damages	50	50	ethan davenport (E00003)	User Departments/Development	12

## 12 Use the Fields to apply filters to the data.

The screenshot shows the 'Invoices' page in the One to One Plus system. The page header includes a search bar and navigation options like 'Columns', 'My Views', 'Export', 'Print All', 'Email All', and 'Add New'. The main content area displays a table of invoices with the following columns: Invoice ID, Invoice Type, Description, Invoice Amount, Balance, Related User, Related User Site, and Related User Grade. The 'Invoice Type' column is highlighted with a red box, indicating it is selected for filtering. The table lists 12 invoices, each with a unique ID, a description of the damage, and associated user information.

Invoice ID	Invoice Type	Description	Invoice Amount	Balance	Related User	Related User Site	Related User Grade
INV-0001045928	Damaged	Bill for csv damages	25	25	Matthew Jackson (24002)	QAHS	8
INV-0001045928	Damaged	Bill for csv damages	25	25	Cristian Kagay (24001)	QAHS	10
INV-0001045925	Damaged	Bulk invoice for damages to computer	25	15	Abner Dawit (D1109056)	QAHS	12
INV-0001045924	Damaged	Bulk invoice for damages	25	15	Aaron Justin Dano (D1907197)	QAHS	11
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INV-0001045921	Damaged	Bulk invoice for damages	25	25	Abigail Perkins (C1101636)	QAHS	12
INV-0001045920	Damaged	Bulk invoice for damages	25	25	Abigail Bahamonde (B1201148)	QAHS	10
INV-0001045929	Damaged	damages	50	50	Joseph Owen (23)	QAHS	12
INV-0001045927	Damaged	missing keys	50	50	Jack Morton (240212184)	User Departments/Management	1
INV-0001045924	Damaged	chromebook	139	99	Sara Lancaster (77)	QAHS	1A
INV-0001045922	Damaged	damages	50	50	ethan davenport (E00003)	User Departments/Development	12

## 13 Select an Invoice to view or modify the invoice.

This screenshot is identical to the previous one, but with the first row of the table selected. The 'Invoice ID' cell for the first row, 'INV-0001045928', is highlighted with a red box, indicating it has been selected for viewing or modification.

Invoice ID	Invoice Type	Description	Invoice Amount	Balance	Related User	Related User Site	Related User Grade
INV-0001045928	Damaged	Bill for csv damages	25	25	Matthew Jackson (24002)	QAHS	8
INV-0001045928	Damaged	Bill for csv damages	25	25	Cristian Kagay (24001)	QAHS	10
INV-0001045925	Damaged	Bulk invoice for damages to computer	25	15	Abner Dawit (D1109056)	QAHS	12
INV-0001045924	Damaged	Bulk invoice for damages	25	15	Aaron Justin Dano (D1907197)	QAHS	11
INV-0001045923	Damaged	Bulk invoice for damages	25	25	Abby Culpepper (C1111348)	QAHS	11
INV-0001045922	Damaged	Bulk invoice for damages for chromebook	25	25	Abril Castro (C1109261)	QAHS	9
INV-0001045921	Damaged	Bulk invoice for damages	25	25	Abigail Perkins (C1101636)	QAHS	12
INV-0001045920	Damaged	Bulk invoice for damages	25	25	Abigail Bahamonde (B1201148)	QAHS	10
INV-0001045929	Damaged	damages	50	50	Joseph Owen (23)	QAHS	12
INV-0001045927	Damaged	missing keys	50	50	Jack Morton (240212184)	User Departments/Management	1
INV-0001045924	Damaged	chromebook	139	99	Sara Lancaster (77)	QAHS	1A
INV-0001045922	Damaged	damages	50	50	ethan davenport (E00003)	User Departments/Development	12