LEGALINVOICE

Guide to using the Legalinvoice system

Update 25/06/2024

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TINEXTA GROUP

SUMMARY

1 INTRODUCTION

Legalinvoice is a simple and secure application for managing e-invoicing obligations. It can be used on both desktop and mobile at:

https://legalinvoice.infocert.digital

The login page offers all the main features available in the app.

On the right, the accesses to the User Area:

- Internal Mail to check automated emails issued and/or received by your account.
- Identification of the User and the Company
- Business profiling settings
- Country selector

- Exit Button

and management functions:

- New: Create a new document/master file of any type
- Document management: consult and modify any document
- Tools: Access to input and output document management options
- Additional services: Coverage page for new services or features
- Help: Access to helpful tutorials and links

On the left side are icons for quick access to some functions.

Favorites = Option to set preferences for quick access to pages inside or outside the app.

Fiscal year = The option to change the reference fiscal year when more than one fiscal year is active.

Dashboard = Quick reference button of the summary dashboard.

Inventory reconciliation = allows access to warehouse control functions

Last Activity = Last Activity Button

Import Electronic Document = Function to import electronic documents

The free search bar is available in all sections of the app. By typing the company name, document number, or product code, the system returns all objects related to the filter entered.

Issuing a document in Legalinvoice is simple and guided by contextual help that facilitates the customer experience.

When the user issues an invoice for the first time, the main input fields are contextualized and explained.

If you click on the gray cross, the suggestions will be paused. The second document will not reproduce the aid.

Nouă **factură**

Număr document

    1/2024

Dată contabilă

    07/06/2024

Valută

    EUR ⌄

Numerotare documentului

Introdu aici numărul documentului pe care trebuie să-l emiți, dacă este activat modul automat de numerotare pentru următorul document, se va propune automat primul progresiv disponibil. Dacă, în schimb, doresti să utilizezi modul **manual**, să setezi progresivele pentru alte tipuri de documente sau să definești și să utilizezi **secțiunile**, mergi la pagina de setări Contoare și secțiuni.

Înainte

Cod de identificare fiscală

Email

Mai multe detalii

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2 **SET UP IMPRESA**
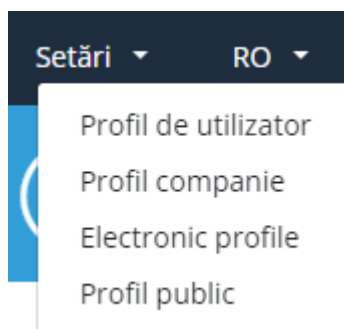
2.1 USER PROFILE

User: Account-specific information

Location parameters: the card contains the parameters involved for national management.

Email account: You can set up an account with your own email system

Profil utilizator: Administrator utente admin

Utilizator
Siguranță
Parametri de localizare
Cont de email
Alerte automate
Preferințe
Setări notificări

Cont de email

Configurare contul de email ⊙

Furnizori disponibili

| Selectează un conector ▼ |

Nume expeditor	Adresa de email	Siguranța conexiunii	Server SMTP	Ușa
		Niciuna ▼		25

Nume de utilizator

admin@testi.it

Password ❓

•••••••••••••

Atașează fișierele direct în email ❓

Nu ▼

☐ Implicită

[Verificare contul]

[✓ Salvează] [✗ Anulează]

Automatic alerts: This option contains the parameters for automatically sending payment reminders and a description of how the option works.

Utilizator
Siguranță
Parametri de localizare
Cont de email
Alerte automate
Preferințe
Setări notificări

Alerte automate

Serviciu de notificare documente expirate neplătite

Activează trimiterea automată a notificărilor

⊙

Numărul de zile de așteptare după termenul limită înainte de a trimite mesajul de reamintire

15

Orario notifica

10:00 ▼

Resetează starea de trimitere automată a notificărilor pentru contactele tale

Lasa neschimbat ▼

Cum funcționează

Serviciul de notificare a documentelor expirate neplatite va trimite automat clientului tău un email cu informații despre documentul expirat. Trimiterea se va face doar pentru contactele pentru care ai activat serviciul și pentru care ai introdus o adresă de email în secțiunea Contacte de afaceri din registrul de date. Pentru fiecare document expirat, se va trimite un avertisment numai după un număr de zile de la data de expirare, fie a documentului sau a eventualelor rate, fie de la ultimul avertisment trimis, acest lucru fiind valabil pentru maxim 3 ori sau până când vei marca documentul sau eventualele rate ca fiind plătite.

Personalizează e-mailul de reamintire

Poți vizualiza și, dacă dorești, personaliza textul emailului accesând panoul de setări **Modele de email** în secțiunea **Profilul companiei** de pe această pagină

[✓ Salvează]

Preferences: The option to choose the opening screen, which can be one of your most recent activities, or the dashboard.

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Notification settings: You can decide the type of notifications you want to receive at your email address. Default notifications are disabled.

2.2   COMPANY

The company profile contains all the information necessary for the management of the issued documents.

Each company is born with preset parameters that you can modify; The values contained in the different choices will represent the default operation of the application.

2.2.1   DOCUMENT HEADER

It contains the company's personal data and is automatically updated when the user is created.

In this section, you can upload your company logo to customize your invoice template. The logo must be image size.

Default logo **+** to access PC folders and select an image of any type.

The header section reproduces the data encoded during customer generation. Tax and organizational information to be printed in the traditional invoice document.

The tax data section initializes the data for the electronic master data.

2.2.2   DOCUMENT TEMPLATES

The system offers some predefined aspects of the invoices.
The default with which the procedure is configured is the complete model (including the display of deadlines).

Use the tool key to choose the default

Antet document
Modele de documente
Profile fiscale
Coduri TVA
Modalitate de plată
Contoare și serii
Valute
Modele de email
Importator de fisiere cu date personale
Gestionare utilizatori
Alte setări

Modele de documente

☐ Include "Imprimat cu Legalinvoice" la sfârșitul fiecărei pagini a documentului

Galerie de modele

Factură ⌄   Română ⌄

Model clasic
Limba **Română**
Specific pentru **România**

Model complet
Limba **Română**
Specific pentru **România**

Model neutru
Limba **Română**
Specific pentru **România**

Model pentru consultar
Limba **Română**
Specific pentru **România**

2.2.3   PROFILE FISCALI

Parameterized models are proposed that facilitate the insertion of the document in cases other than standard VAT.

The default profile of the system is the one called Standard VAT Regime; The company can always customize this setting.

Antet document
Modele de documente
Profile fiscale
Coduri TVA
Modalitate de plată
Contoare și secționale
Valute
Modele de email
Importator de fisiere cu date personale
Gestionare utilizatori
Alte setări

Profile fiscale

Profile fiscale configurate ⊙

Profil fiscal
Factura   Implicit

Parametri profil fiscal

utente: Nume utilizator ⊙   Model   Periodicitate TVA
                            Doar TVA   ⌄   Lunar   ⌄

Text voce cheltuieli   Alte setări

                                                     ☐ Prezintă totalul brut al documentului

Referințe legale privind divizarea plătilor de adăugat la note (când este aplicabil)

                          ⊕

Adaugă profil fiscal

2.2.4   VAT CODES

In this section, the standard VAT percentages of the system are pre-loaded. It is possible to add other VAT percentages.

The 19% VAT percentage is default as standard, but with the action key you can set up your account by choosing a different default rate.

The default VAT percentage will be proposed as a priority and will always be modifiable when issuing the documents.

2.2.5 PAYMENT METHOD

The table is created with a series of pre-coded values, modifiable based on customer experience; The table is proposed in Collection Management and First Note. It is not reported as information on the invoice because only official codes are allowed.

2.2.6 COUNTERS AND SERIES

Document counters are visible and editable.
The counters are created automatically, although you can choose manual counters to insert the progressive document without having any proposal in the system.

The system proposes a set of predefined counters activated on the documents to which it refers.

Legalinvoice provides a list of predefined counters that can be profiled to apply to the desired

document type, set as predefined or integrated by adding new ones with the action key.
For the company that starts during the year, you need to update the counter to the next available number.
Once the parameters are selected, the meter must be activated with the ON button.

Profil companie: Test Romania001

Contoare și serii			
Folosește modul automat de numerotare și gestiunea secțiunilor			
ON			
Nume utilizator **Chitanțe emise**		Următorul cod 1/2024	An fiscal 2024
Nume utilizator **Documente de transport**		Următorul cod 1/2024	An fiscal 2024
Nume utilizator **Facturi A**		Următorul cod 1/A/{AAAA}	An fiscal 2024
Nume utilizator **Facturi emise**		Următorul cod 1/2024	An fiscal 2024
Nume utilizator **Facturi/Note de credit primite**		Următorul cod 2/2024	An fiscal 2024
Nume utilizator **Facturi/noti de credit emise**		Următorul cod 7/2024	An fiscal 2024

Left navigation menu:
- Antet document
- Modele de documente
- Profile fiscale
- Coduri TVA
- Modalitate de plată
- Contoare și serii
- Valute
- Modele de email
- Importator de fisiere cu date personale
- Gestionare utilizatori
- Alte setări

Selectează cu ce documente vrei să folosești această secțiune

Factură emisă
- ☑ Implicit   ON

Factură automată emisă
- ☑ Implicit   ON

Factură primită
- ☐ Implicit   (off)

Notă de credit emisă
- ☑ Implicit   ON

The activated meters will be proposed during the issuance of the document.

Seria

Facturi/noti de credit emise ⌄

Facturi A

Facturi/noti de credit emise
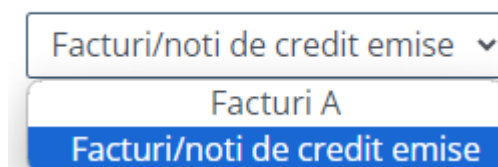
2.2.7 CURRENCIES

The reference currency you want depends on the country in which you operate.

You can select an additional currency when issuing the document to highlight the total document in a currency other than your own.

When issuing an invoice, the exchange rate will be that of the day of yahoo finance with the possibility of modification. If the dual currency is used, both currencies will be offered in the invoice printout.

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Valute

Moneda de referință   Moneda de schimb

RON ▾   Niciuna ▾

✓ Salvează

Antet document

Modele de documente

Profile fiscale

Coduri TVA

Modalitate de plată

Contoare și secționale

Valute

Modele de email

Importator de fisiere cu date personale

Gestionare utilizatori

Alte setări

2.2.8 ENAMEL TEMPLATES

The feature allows you to customize some email template on the client.

Antet document
Modele de documente
Profile fiscale
Coduri TVA
Modalitate de plată
Contoare și secționale
Valute
Modele de email
Importator de fisiere cu date personale
Gestionare utilizatori
Alte setări

Modele de email

Model: Model

Livrare factură recurentă ▾

Obiect

Numar de factura $$documentcode$$ din $$documentdate$$ disponibil online

Mesaj

↶ ↷   **B** *I*   ≡ ≡ ≡ ≡   ☰ ⌄ ☰ ⌄ ⇤ ⇥   🔗 🖼   **A** ⌄ **✎** ⌄ ☺

Stimate client,

vă trimitem factura nr. $$documentcode$$ din data de $$documentdate$$

Distinse salutări,
$$companyname$$

Substitut pentru valori

Puteți utiliza diverse cuvinte cheie care vor fi înlocuite automat cu date reale atunci când Legalinvoice trimite un nou mesaj folosind acest șablon.

$$companyname$$	Denumirea ta comercială
$$recipientname$$	Numele/denumirea societății destinatare a mesajului
$$sellername$$	Denumirea comercială a celui care a emis documentul
$$buyername$$	Denumirea comercială a clientului
$$documentcode$$	Numărul documentului (ex. 45/2024)

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2.2.9   IMPORTER OF PERSONAL DATA FILES

In the company profile section, it is possible to import main data about customers/suppliers or products/services.

Guided import provides the ability to download a sample file (csv, xls, xlsx) to build the file to be imported correctly.

Denumirea societății	Adresă	Cod poștal	Oraș	Județ	Cod de țară	Cod de TVA	Cod fiscal	REA	Reprezentant fiscal	Identificativ fiscal	Cod de destinatar
Sam Riley	28 Prestwick Road	WA4 6SE	Preston		GB	GB999999973					XXXXXXX
Mircea Popescu	ul. Rudzka 36	10012	Alba Iulia	AB	RO		12345678910	ABCDEF70R11L123A	AB-12345678910		
Hotel Hagi	Strada 1 Decembrie 1918 nr. 4	10011	Bucarest	B	RO	RO12345678911	12345678911	B-12345678911			0000000

Once you have built and selected the file, it is proposed to simulate the import:

Confirming the operation, the system uploads the personal data.

If errors occur during import, they are reported in the activity summary. After importing, an email is sent with the result.

Confirming the operation, the system uploads personal data.

Importator de fisiere cu date personale

Registre clienți/furnizori ▾

ATENȚIE: previzualizarea arată ce vom importa (valorile din previzualizare sunt abreviate din motive de practicitate), astfel dacă observi date incorecte sau lipsă înseamnă că fișierul furnizat nu este conform cu cei gestionat de importator sau nu este complet și deci este recomandabil să anulați operațiunea.
În timpul importării, dacă una sau mai multe rânduri sunt eliminate, acestea îți vor fi indicate, împreună cu motivul eliminării, în fișierul pe care îl poți descărca din meniul acțiunilor elementului de notificare a importului efectuat, pe care îl vei găsi în pagina Ultimele activități.
În cazul în care importul nu este satisfăcător, totuși, poți să-l anulezi în termen de 24 de ore prin acțiunea "Anulează operația", pe care o vei găsi întotdeauna în meniul acțiunilor notificării.

Denumirea societății	Adresă	Cod poștal	Oraș	Județ	Cod de țară	Cod de TVA	REA	Reprezentant fiscal	Identificativ fiscal	Cod de destinatar	PEC		Termeni de plată	Termeni de plată pe
Sam Riley	28 Prestwick Road	WA4 6SE	Preston		GB	GB999999973				XXXXXXX	sam.riley@pecme.com		MP05	Cash
Mircea Popescu	ul. Rudzka 36	10012	Alba Iulia	AB	RO	12345678910	AB-12345678910						transfer	Plata
Hotel Hagi	Strada 1 Decembrie 1918 nr. 4	10011	Bucarest	B	RO	RO12345678911	B-12345678911			0000000	hotelmiramare@pecme.com	MP01	Plata	

✓ Confirmare importare   ✕ Anulează

After importing, you can cancel the same within 24 hours by acting from **Last Activity, Cancel Import.**

2.2.10 USER MANAGEMENT

Legalinvoice allows you to share access to the platform with other users invited by the account holder.
You can define access permissions in both read and write.
Updating the requested data creates a new account; At the end of the process, the owner will receive an email containing the credentials to access the https://legalinvoice.infocert.digital site

2.2.11 OTHER SETTINGS

The update of the customer and/or suppliers register can be done automatically during the import/receipt of active and passive documents, respectively if the choice status is set to ON.
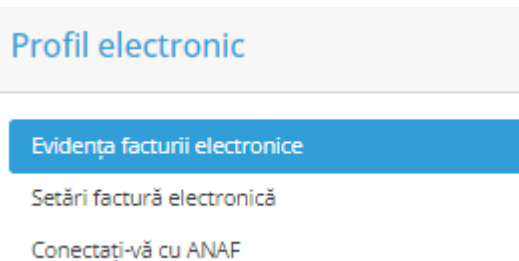

By default, the setting is OFF.

3 PROFIL ELECTRONIC

The configuration of the electronic profile is essential for communication with ANAF.

After completing the registration and selecting the user's preferences, it is essential to authorize the application to access your SPV on CUI or CIF at ANAF.

The information required for the electronic management of the active and passive cycle is detailed in the following sections.

3.1 ELECTRONIC INVOICE RECORD

You must check them carefully, paying special attention to VAT and the Fiscal Code. By saving the VAT and **Fiscal Code data, they will no longer be editable.**

Trade Name-Last Name is the information that must be coded to identify the company name that will be set on the eInvoice.

Tax Subject Type: the field that must be used only if the issuer (originator/creditor) is subject to withholding tax as an advance or final, specifying whether it is a natural or legal person.

Tax subject type = 'NATURAL PERSON'
Filling in these fields affects the creation of the XML file and the printing of the invoice in PDF format for **the only subjects** that in the 'Tax subject type' 'Natural person' set

Tipul subiectului fiscal ❓

Persoană juridică ⌄
Persoană juridică
Persoană fizică

Type of tax subject = 'LEGAL PERSON'

Tax Regime: the list of values provided by the technical specifications of electronic invoicing.

Liquidation status: indicate whether the company is in liquidation or not.
Company structure : in the case of public limited companies, the information element must be used to indicate whether there is only one member or whether there are several members.

Share capital: in the case of limited liability companies (SpA, SApA, SRL), the information element must be evaluated to indicate the share capital.

After saving the VAT and Fiscal Code fields, they will be blocked.

3.2   ELECTRONIC INVOICE SETTINGS

The following values can be predefined within the electronic profile:

Setări factură electronică

Valori prestabilite

Tipul de document predefinit	Format predefinit de schimb
380 - Factură ⌄	Factură ⌄

Default document type: you can predefine the most used document type

Default Interchange Format: You can predefine the size of your B2B invoice or PA invoice.

3.3   CONNECT WITH ANAF

There are three prerequisites for managing e-invoicing:

- Users can fill in the registration form provided by ANAF at the following link: https://www.anaf.ro/InregPersFizicePublic/formularjuridice.jsp following the instructions for compiling and controlling the registration contained in the following video: https://www.youtube.com/watch?v=XFQ9KJrI5v0
- **Possession of a qualified digital signature certificate**
  https://www.anaf.ro/InregPersFizicePublic/formularjuridice.jsp The digital signature certificate with access to the virtual private space (SPV) can belong to the company or its accountant. If it is missing, the url will be proposed on the ANAF website containing information about it.

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- Authorize the Legalinvoice electronic invoicing process for sending and receiving documents on ANAF.

    In the connection phase to ANAF there are several options:

- The user has a certificate in a personal capacity: in this case he must select the green tick to authorize the Legalinvoice account, the anaf authentication and authorization page is proposed.
- The user uses the certificate of his accountant: In this case, a link is proposed that the user must pass on to his accountant who, in turn, must complete the authorization phase.
- The user does not yet have the digital certificate having already subscribed to ANAF: in this case, the user must select the red tick that will direct him to the ANAF purchase indication page

The need to authorize Legalinvoice to access the SPV is highlighted to the user with the following message:

To send your invoices directly to ANAF, a token generated with a digital certificate is required. If you already have access to the SPV and you have a digital certificate, you can go directly to generate the requested token.

If you do not have a digital certificate, for more information access this page on the ANAF website: https://www.anaf.ro/anaf/internet/ANAF/servicii_online/inregistrare_utilizatori/

Important: For technical reasons, ANAF does not allow sending electronic invoices on the day when access to the SPV was approved, you will be able to send your invoices only starting the next day.

Conectați-vă cu ANAF

Pentru a transmite direct facturile tale la ANAF este necesar un token generat cu un certificat digital.
Dacă ai deja acces la SPV și dispui de un certificat digital, poți accesa direct pentru a genera tokenul solicitat.
În cazul în care nu ai un certificat digital, pentru mai multe informații accesează această pagină de pe site-ul ANAF: https://www.anaf.ro/anaf/internet/ANAF/servicii_online/inregistrare_utilizatori/
Important: Din motive tehnice, ANAF nu permite trimiterea facturilor electronice în ziua în care a fost aprobat accesul la SPV, vei putea trimite facturile tale doar începând cu ziua următoare.

4   WAREHOUSE MANAGEMENT

Warehouse management is available in Legalinvoice that allows stock monitoring.
Warehouse management is available in the Company Settings section and offers 4 options.

Product categories: categories to combine with products in stock to classify them.

The category information will be listed in the xls sheet that can be exported to the Product and Services Master.

All products linked to a given category could be enabled for automatic monitoring of supplies based on the available qualification parameter per category.

Cod de identificare	Descriere	Preț unitar	Monedă	Reducere	Cantitate prestabilită	Unitate	Cod de TVA	Cota TVA	Notițe	Sold	Categorie
	Frigider	2.400,00	RON	0%	1,00		19	19,00%		40,00	
	Laptop	1.000,00	RON	0%	1,00		19	19,00%		20,00	Tehnologie

If the product does not belong to a category or if the category does not have an active inventory valuation, inventory management is not automatically updated.

Inventory management: In this section you can choose how to manage FIFO (first on first out) and LIFO (left on first out) stocks.

Price variation lists: The concept of category is also related to the management of custom price lists.
It is possible to create a general increase/decrease price list applicable to individual products in the product registration process.

If there are categories, the reduction of the price list is proposed for the existing individual categories.
The user can always choose not to apply it or to apply it to a different extent on the individual category.

Discounts can be applied as a percentage or amount with either a + or a - sign.

4.1   PRODUCT/SERVICE DATA

The effect of setting the price list will be visible in the register of products where the selling price is presented both as a unit cost and as a net/gross selling price of the discounts and surcharges applied.

Nou **produs/serviciu**

Date produs/serviciu

Tip cod   Cod:

Descriere

Laptop

Cost unitar   Moneda

1.000,00   RON

Categorie produs   Listă variație de preț

Tehnologie   Clienții din zona de nord

Preț de vânzare

900,00

Reduceri și majorări ❓   Cantitate minimă   Unitate de măsură

                                 1

The sale price will be proposed in the invoice line as a unit price, to this value it will be possible to apply additional discounts or surcharges expressed in the invoice.

If the object of sale of the product/service is not combined with categories or price lists it can always be associated with a price list directly at the time of issuing the invoice

Detaliu ❓

| ⊕ Produs/serviciu | ⚙ Cheltuială | ⛽ Combustibil |

Cod de produs ❓   Descriere

                    Laptop

Preț	Cantitate	Unitate de măsură	Listă de reduceri ❓	Categorie produs	Reduceri și majorări ❓	Total
lei 900,00	1			Tehnologie		lei 900,00

TVA   Total (TVA inclus) ❓   Impozabil

19% - Impozabil 19%   lei 1.071,00   Da

In the Register of Products/Services it is possible to establish the suppliers connected to the master in order to facilitate the reconciliation of supplies.

Coduri suplimentare

Depozit

Cantitate stoc curent

10

Furnizor

Furnizor
DELL TECHNOLOGY SRL

➕ Adauga codul

4.2   INVENTORY RECONCILIATION

Inventory reconciliation covers both active and payable invoices.
If the purchase/sale invoice contains an existing product in the list, the management of the increase or decrease in the offer is automatic.
If the product is not managed, manual reconciliation is proposed via the function in the quick menu.

Once the product has been selected to be reconciled, different options are proposed:

- ⊓   Confirmare descărcare marfă
- ✐   Modificare
- ✕   Ignora
- 📦   Deschide produsul
- 👁   Deschide documentul

Goods Load Confirmation: This choice creates a new product list enhanced with the information on the purchase or sale invoice.
Change: Choosing allows you to upload the selected line to an existing list item and with a different code and description than those displayed on the purchase/sales invoice.

By saving the buy/sell line description is updated and it is possible to select the Confirm stock loading options to evaluate the escort.

Ignore: This option removes selected rows from reconciled products
Open Document: The option to display the document for verification.

Selection of different documents is available massive order for loading/unloading stocks.

The effect of inventory reconciliation is displayed in the Product Register, Warehouses and Activity History section.

5 PUBLIC PROFILE

Legalinvoice is "Social", the companies that use the service identifies a network of companies that can see and relate to each other.

Privacy: Legalinvoice's new client companies are born with a private profile, using the corresponding checkboxes it is possible to make them public.

Any exception to these criteria must be chosen on a case-by-case basis.

To promote your services within the network, it is possible to create a public page that will be viewed by all users of the network.

Public data: This page identifies the data to be made public, such as the image, address or description of the business.
After making your changes, select Save to preview and verify the result.
Background and color of the public page: graphic options to define your own page on the Legalinvoice social network.
After making your changes, select Save to preview and verify the result.
External web pages: to propose external links on the Legalinvoice public page.
After making your changes, select Save to preview and verify the result.
Image gallery: to add other images in addition to the main one.

In each of these options, after you've updated the information you want to publish, select Save to preview and verify the result.

6 DOCUMENT NOU

Emitere	Înregistrare	Registrul de evidență	Arhivă
Factură	Factură	Client/furnizor	Incarca documentul
Notă de credit	Notă de credit	Produs/serviciu	
Proforma	Importă document electronic	Banca/cont	
Document de transport	Nota intrare		
Ofertă	Notă de cheltuieli		
	Transfer bancar		

6.1 RECORD REGISTER

6.1.1 CUSTOMER/SUPPLIER

As for customers/suppliers, it is possible to pre-upload them as illustrated above, to introduce them in the document registration phase or to enter them directly into the master data management.

In the process of entering, the tax identifiers are verified by applying the formal controls required by law.

When the data register is known by the system, several suggestions may appear:

Adresa de facturare

Client

abc

ABC
Mun. Brașov, România

Blue register: these are the records managed by the company at the time of issuing the document.

Local registers: By entering the VAT number, the system verifies the presence of the code in the ANAF and V.I.E.S. (VAT Community Numbers) list.

By selecting the proposed register, the register data is acquired.

Date contabile

Cod de TVA

25438783

AUDIT EAM ZUCA
AUDIT EAM ZUCA

When saving the data, the verification of the correctness of the tax code is repeated, if you intend to force the field with an incorrect value, there is the possibility to force the value.

For the registration of companies resident in Bucharest, attention must be paid to the formalism of coding the sector. The sector must be entered in capital letters and sector number at the end, without spaces.

Oraș/Sector

SECTOR1

In the customer/supplier database, in addition to tax and accounting data, it is possible to encode other information:

The other sections, which can be accessed by clicking on them, are:

Payment terms and information: it is possible to enter the payment method to be used for the issuance of documents in electronic format and the payment method to be used for paper

INFOCERT
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documents.

The chosen payment method will be automatically reported on the document; It is possible to change the default payment method on the customer directly on the document itself.

Condiții și informații de plată

Descriere pentru documente normale/de hârtie ❓ Termen limită ❓ de serie al programului de contabilitate ❓

| | GGDF ⌄ | |

Contacts: the contact email to which the system automatically sends the invoice is the one provided in the company's contact section.

Contacte

Comerciale

Telefon   Telefon mobil

Fax   Email

Referent

Titlu

Dl. ⌄

utente: Nume utilizator   Nume de familie

Telefon   Telefon mobil

Fax   Email

Bank/account: represents the credit institution of the customer or supplier.

Banca/cont

Date bancare

Nume bancă/cont

Adresă

Cod poștal   Oraș   Județ   Țară
                              România ⌄

Agenția număr   ●

IBAN

SWIFT

Codul național al băncii

Cod de sucursală bancară

Titularul contului

Predefined transport information: the transport data which, if entered, will be incorporated into the invoice details.

Informații de transport predefinite
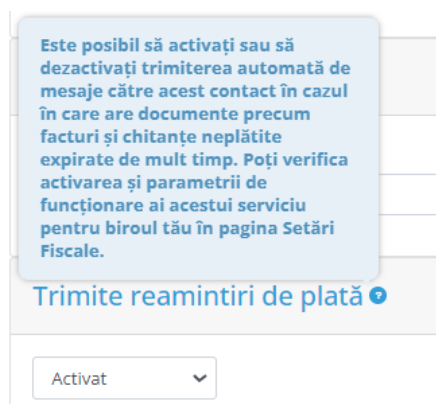
de operare   Motivul transportului   Transportator

Informații de transport predefinite

de operare   Motivul transportului   Transportator

Modalità   Causale trasporto   Trasportatore
prova   prova   prova

Send payment reminders: To enable or disable the request email to customers for overdue payments**.**

Este posibil să activați sau să dezactivați trimiterea automată de mesaje către acest contact în cazul în care are documente precum facturi și chitanțe neplătite expirate de mult timp. Poți verifica activarea și parametrii de funcționare ai acestui serviciu pentru biroul tău în pagina Setări Fiscale.

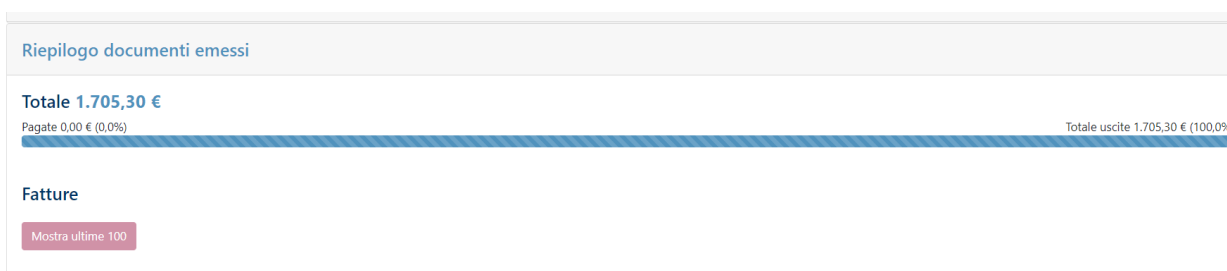Trimite reamintiri de plată ❓

| Activat | ⌄ |

Notes: annotations that can be added for internal use.

Note

Note pentru uz intern

Summary of documents issued and/or received: in order to have a concise presentation of documents relating to the customer, it is possible to view up to 100 documents issued/received for that customer/supplier

Riepilogo documenti emessi

Totale **1.705,30 €**
Pagate 0,00 € (0,0%)   Totale uscite 1.705,30 € (100,0%)

Fatture
Mostra ultime 100

6.1.2 PRODUCT/SERVICE

In the register of products/services you will find the information related to the price list to be reproduced on the invoice.

All coded information will be proposed in the issuance phase of the document.

It is possible to create a price list and change the price when the invoice is issued without changing the original price list.

The operational indications in warehouse management explain how to use dedicated fields for

managing differentiated price lists.   tag.

In addition to this information, you can enter discounts and markups that will be applied in the

invoice detail line.   tag.

Also, this reduction can be entered with a percentage value, the value of the + sign (increase) or the minus sign (reduction).

The price list can be imported through the master data importer, present in the company profile section

There is the possibility to download a sample file (csv, xls, xlsx) to correctly create the file to be imported.

Importator de fisiere cu date personale

Registrul de evidență a produselor / serviciilor ⌄

Fișierul acceptat pentru import poate fi în format CSV, XLS sau XLSX, dacă ai nevoie, mai jos poți descărca un fișier exemplu CSV, XLS, XLSX

Selectează un fișier sau trage-l aici pentru a-l încărca

✕ Anulează

Additional codes: Additional identification codes can be entered.

Warehouse: You can consult the stock of products and associated suppliers.

Notes: To enter internal reports.

Coduri suplimentare

Depozit

Note

6.1.3 BANK/ACCOUNT

In the bank/account data register, it will be possible to pre-code the customer's banks and additional bank-related information.
The recurring bank that will be proposed in the management of the issued documents may be chosen.

Nouă **bancă/cont**

Date bancare

Nume bancă/cont

Adresă

Cod poștal   Oraș   Județ   Țară

România

Valută

RON

Agenția număr

IBAN

SWIFT

Identificator Creditor

Cod SIA

Titularul contului

Referent						
Titlu	utente: Nume utilizator	Nume de familie	Telefon	Telefon mobil	Fax	Email
Dl. ▾						

Notite

☐ **Implicită: folosește întotdeauna aceasta ca bancă de referință în documentele emise**

6.2 ISSUING

Emitere

Factură

Notă de credit

Proforma

Document de transport

Ofertă

Legalinvoice handles multiple documents, but regardless of the document to be entered, the

management is similar and guided by a range of contextual help

The input/input format is similar to paper templates and sequentially proposes all the necessary fields that guide the user through the help buttons.

The insertion methods are identical for each type of document, from estimate to credit note. The electronic document will require more information about the legislation in force.

If the electronic invoicing options have been established on the company, when issuing the document, the format chosen in the settings with the possibility of modification will be proposed.

Selecting the eInvoice will allow the activation of the formats required by the legislation.

To manage a credit memo in Legalinvoice there are two ways; The recommended method is to select the invoice to be corrected and automatically create a credit note from the invoice, which will produce a document identical to the invoice, but with type 381. Alternatively, you can create a

new invoice, choose document type 384 and enter the amounts in the negative.

Document numbering is proposed automatically; In your company profile, you can change the standard counter/numbering or create new ones.

If different sections are enabled, the default setting is proposed with the possibility to change it through the sectional check box.

The proposed date is the day with the possibility of change.

6.2.1 CUSTOMER DETAILS

The encoding of the initials of the Company name or the VAT number determines the search among the existing personal data by reporting the stored data.

Detalii client

Client

ABC

ABC
Mun. Brașov, România

In the case of a new register, the screen [Mai multe detalii] that allows the necessary data to be encoded will be proposed.

In the case of a new register, you can access the search in the ANAF register by typing the CUI/CIF code. The personal data present in ANAF will be reported

Detalii client

Client

CUI/CIF

449981

FIATEST SRL
FIATEST SRL (RO) Int. Tocului, 8

The CUI/CIF field is verified by applying official regulatory controls.

If you intend to force the field with an incorrect value, the user can confirm the force.

CUI/CIF

44998111111

Folosește totuși valoarea introdusă

If the field is not corrected in the invoice or in the register, the company's verification is repeated on the next entry and the user is obliged to confirm the error again.

If you save a document with empty PIVA and CF, saving highlights the error.

For the registration of companies resident in Bucharest, attention must be paid to the formalism of coding the sector. The sector must be entered in capital letters with sector n. at the bottom, without spaces.

Oraș/Sector

SECTOR1

After updating your personal data, you can enter the details of the document.

6.2.2 PRODUCT/SERVICE

By selecting Product/Services it is possible to access the data register to select the price list through the product code field have description.

The Quantity and Unit of Measure fields are mandatory in the electronic invoice.

The units of measurement are those required by European legislation.

If the product is managed with multi-list or category, the unit price that derives from the application of the price list is proposed. The information used to calculate the price is displayed in the **Discount List** and **Product Category fields**.

If a **Rebate** or **surcharge** is entered directly on the invoice line, it is applied to the **Price field** and changes the total taxable VAT. The price reduction or increase can be entered both as percentage values and as an amount. The +/- sign determines whether it is an increase (+) or a decrease (-).

The VAT field is used to identify the regulatory title for the VAT liability; when filling in the detail, the default VAT is proposed with the possibility of modification.

The **Total (VAT included)** field, if filled in before the Price field, causes the Total and VAT to be

automatically recalculated.

Taxable Field **D/N**: manages taxable amounts other than VAT if they are represented in a specially created tax profile.

Taxable Field **S/N:** Taxable management other than TVA in the event that they are represented in a specially created Tax Profile. **De obicei nu este folosit.**

By saving the invoice line, the total is calculated automatically.

Confirmare

To complete the detail of the invoice, a map of the additional information that could be used in the future to integrate the tax information contained in the electronic invoice is provided.

Linia de contabilitate a cumpărătorului

Linie de comandă de achiziție la care se face referire

Perioada de facturare

Data început perioadă   Data sfârșitului perioadei

Alți identificatori

Identificatorul vânzătorului

Identificatorul cumpărătorului

Identificatorul standard

Standard

Identificatori de clasificare a articolului

+ Adăugați un identificator nou

Țara de origine

(Nu se aplică/solicitat)

Atributele articolului

+ Adăugați atribut nou

After filling in the details of the invoice, the general summary is proposed

Detaliu ❓

	Cod de produs 001	Descriere Calculator						
	Preț lei 900,00	Cantitate 1	Unitate de măsură	Reduceri și majorări	Total lei 900,00	TVA 19% - Impozabil 19%	Impozabil Da	
	Cod de produs 002	Descriere Mouse						
	Preț lei 45,00	Cantitate 1	Unitate de măsură	Reduceri și majorări	Total lei 45,00	TVA 19% - Impozabil 19%	Impozabil Da	

Parametrii fiscali ❓   Exigibilitatea TVA ❓   Valută și curs valutar ❓

Factura   Exigibilitate imediată   0,0000   Nici o selecție

Reduceri și majorări ❓   Rotunjire ❓

0,00

Detaliu calculări

Total fără TVA   lei 850,00   Total TVA 19% (19)   lei 161,50

                                            Total factura   lei 1.011,50

lei 1.011,50

The fiscal parameters are set with the Invoice, if the user has coded other models in the Fiscal Profile

The tax parameters are set with the Invoice, if the user has coded other models in the Tax Profile

VAT payable: immediate payment is proposed, which is the most common use case.

Currency and exchange rate: the invoice can also be expressed in another currency.

Rebates and surcharges: Allows you to manage rebates and surcharges that don't affect the taxable total. A percentage value or an amount can be entered, discounts can be entered in a "cascade" mode (-4% -2.5% + 7%). Negative values are interpreted as discounts and positive values as surcharges.

Reduceri și majorări		Rotunjire	
-24,00		0,00	
Detaliu calculări			
Total fără TVA	lei 945,00	Total TVA 19% (19)	lei 179,55
		Total factura	lei 1.124,55
		Reducere/suprataxa (-24,00)	lei -24,00
			lei 1.100,55

Round: To enter a rounding to the total amount.

Rotunjire	
-0,55	
Total TVA 19% (19)	lei 179,55
Total factura	lei 1.124,55
Reducere/suprataxa (-24,00)	lei -24,00
Rotunjire	lei -0,55
	lei 1.100,00

You can reorder invoice details even after they are stored; The feature is activated by clicking on the detail and moving it with your mouse to another location.

At the end, confirm the entry with the save button.

✓ Salvează   **✕ Anulează**

.

6.2.3 TRANSFORM OFFER OR PROFORMA INTO FACT

If there are documents that have not yet been converted into an invoice for the customer, it is possible to enter them directly during the issuance of the invoice.

In this case, the system displays these tags that allow you to view and import them.

Detaliu ❓

🔆 Produs/serviciu	♻ Cheltuială

▷ Adaugă din proforma   **⌗ Adaugă din cotizație**

Highlighted labels only appear if there are suspended or still unprocessed customer documents on an invoice.

Once the type of document to be imported has been selected, the system proposes the list of those not yet included in the invoice.

In the same document it is possible to enter different types of documents.

6.2.4 PAYMENT TERMS AND INFORMATION

During the issuance of the document, before defining the possible payment plan, the procedure allows for the coding of an immediate collection for the total amount or an expiry line.

The Paid field allows you to store the collection for the entire amount.

In the document you can generate different deadlines through the Payment conditions and information option.

Once the deadline has been defined, it is essential to confirm the entry with the button

At each insertion, the system always proposes the residual value and facilitates the storage of the expiration with automatic parameters in relation to the selected expiration type.

Condiții și informații de plată

Descriere termeni de plată				

Total ?	Descriere termeni de plată	Termen limită ?	Data	Plătit
lei 74,00		Dată specifică ▼		Neplatit ▼ ✓

Termen limită Dată specifică	de serie al programului de contabilitate	Data 30/06/2024	Total lei 45,00	
Termen limită Dată specifică	de serie al programului de contabilitate	Data 31/07/2024	Total lei 74,00	

The possible banking information is that provided by European legislation.

Modalitate de plată

Codul tipului modului de plată

Textul modului de plată

Informații despre remitere

Informații card de plată

Număr primar al cardului

Numele titularului

Direct debit

Identificator de referință de mandat

Identificatorul de creditor atribuit de la bancă

Identificatorul contului debitat

Acreditați pe cont

Nume bancă/cont

Adresă

Cod poștal

Oraș/Sector   Județ   Țară
România ▼

Agenția număr ●

IBAN

SWIFT

Titularul contului

6.2.5 RECEIPTS

Direct access to the management of useful document collection in subsequent management stages.

Încasări		
INCASAT lei 0,00	**DE ACHITAT** lei 119,00	**EXCEDENT** lei 0,00

Total ●	Data valută	Banca/cont	Modalități de plată	
0,00				✓ ✕

6.2.6 NOTES

To add notes that will be reported in the eInvoice or notes that will remain for internal use.

Note	
Note de adăugat pe document	Note pentru uz intern

The "Notes to be reported in the document" field is displayed in the electronic invoice file.

6.2.7 OTHER INFORMATION ABOUT THE ELECTRONIC DOCUMENT

This section contains additional information that can be used to integrate the document with data other than strictly fiscal data.

Alte informații despre documentul electronic

6.2.8 UNTIL NOW

Atasamente

Selectează un fișier sau trage-l aici pentru a-l încărca

To attach documents by uploading files.

In the case of issuing the electronic invoice, the PDF useful for viewing the document is included in the xml file that will be sent to ANAF.

When you're done, click "Save to store the document.

Document validation errors can be highlighted during saving, in these cases the system does not save and highlight the missing field or action.

✓ Salvează   ✕ Anulează

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6.3   RECORD

Înregistrare

Factură

Notă de credit

Importă document electronic

Nota intrare

Notă de cheltuieli

Virament între conturi

Through a series of guided maps it is possible to enter different types of documents into the system.

6.3.1 INVOICE

The manual registration function remains active even if it is replaced by the electronic management of passive documents. Both purchase invoices and received credit notes can be recorded in this option.

The display of invoices received or credit notes received is similar to that of invoices issued.

6.3.2 IMPORT DOCUMENT ELECTRONIC

It is possible to import electronic invoices (active or passive) from external sources, they must comply with official formats. Uploading them is available from this function and through the icon

provided in the shortcuts [icon] .

Importator **documente electronice**

Pe această pagină puteți importa facturi electronice, precum și note de credit și alte tipuri de documente suportate emise de dvs. sau de furnizorii dvs.
Trăgând fișierul în zona de mai jos, veți vedea informațiile principale ale documentului înainte de a confirma importul efectiv.
Documentele importate vor fi adăugate în panoul dvs. Legalinvoice și le puteți gestiona ca orice alt document produs cu Legalinvoice, dar nu veți putea modifica datele documentului, cu excepția informațiilor despre încasări/plăți și notele interne.

Selectează un fișier sau trage-l aici pentru a-l încărca

The system supports both single *.xml or *.p7m files, as well as *.zip files that contain multiple documents.

The file is analyzed, proposed, and, if confirmed, will be imported into the system.

The system checks whether the document belongs to the company in use and whether it has not already been uploaded.

In the import phase, the customer or supplier register is created if it is missing.
The import of electronic documents involves generating the deadline if this information is available on the imported xml file.

eInvoice imported FOR TRANSMISSION are immediately available to be sent to ANAF.

In the import phase, the issued invoices are imported with the fiscal year = the year stored in xml.

6.3.3 ENTRY NOTE - EXPENSE NOTE - VIREMONT BETWEEN ACCOUNTS

Nuova **nota entrata**

Numero protocollo	Data contabile
1/2022	13/09/2022

Descrizione

Cliente/fornitore	Banca/conto di accredito	Modalità di pagamento	Valuta	Importo
			EUR	0,00

Codice IVA	Importo IVA inclusa	Detraibilità (%)	Scadenza	Pagato
22% - Imponibile 22%	0,00	0,00		No

Data valuta	Termini pagamento

Tags categoria

Conferma

Choosing these functions allows you to record accounting movements in Legalinvoice, different from those coming from electronic invoices.
These movements will be displayed in the summary of the accounting book.

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6.4   DOCUMENT UPLOAD ARCHIVE

Option available to upload documents to Legalinvoice.
The user has 1000 MB at his disposal, if the limit is exceeded, the documents will not be uploaded and the uploaded one will have to be deleted.

Utilizați 0,00 MB din 1000 MB

Arhivă **documente**

Utilizați 0,00 MB din 1000 MB

Selectează un fișier sau trage-l aici pentru a-l încărca

☐ 1 elemente **Actualizează**

☐ 🗜 **test.zip**
Dimensiuni 1,85 KB

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7 VIEWING/MANAGING DOCUMENTS

The management of electronic documents and other available types is carried out through the single actions present on the document or through the multiple ones available on the dashboard.

For all types of documents, a summary dashboard is proposed that contains the list of documents and the available actions, double-click on the document to modify it.

Chech box selection to enable massive or document-specific functions

Tools icon with possible actions on the document

Filter icon to select documents

Vertically colored context bar highlighting payment status (red = red, green = yellow paid = credit/debit overdue)

7.1 DOCUMENTE EMISE

The issued documents can be viewed and managed through the different selections and actions

offered through the actions icon.

7.1.1 PREVIEW

After sending it to ANAF, the preview button shows the tracking of the document.

7.1.2 SHOW

This option displays the PDF invoice, even if the document is in electronic format. Save the pdf to keep the traditional document.

7.1.3 DOWNLOADING

Requires pdf + xml file download. If the document is electronic, the pdf is the translation of the xml file into readable format.

7.1.4 SEND BY EMAIL

Available for both types of documents.

7.1.5 ELECTRONIC TRANSMISSION

The transmission of the invoice to ANAF is provided only for electronic invoices. Choosing the send causes the document to be blocked immediately.

7.1.6 SEND A PAYMENT REMINDER

It is provided in case the service is activated and if there are overdue invoices on request.

7.1.7 CREATE A CREDIT MEMO

To automatically create a credit memo from the selected document

7.1.8 COPY INVOICE

To copy the invoice and automatically create a new, identical, editable invoice

7.1.9 EXTRAS DE CONT

To quickly access the account statement feature of the selected customer.

7.1.10 ELIMINATE

Option possible only for documents that have not yet been sent to ANAF.

7.1.11 ANAF MESSAGE TRACKING

After sending the document to ANAF, with the Preview button, you can follow the document through ANAF messages. The status of the electronic invoice can be "ANAF accepted", "ANAF rejected" and "In transmission"

STARE F. ELECTRONICĂ

e **Acceptată ANAF**

e Respinsă ANAF

e În transmitere

In case of error, conditions highlighted in the trace with red icons, the document is made available again for correction, allowing a new submission with the same number and date.

The notification of the error will contain the reasons for the deviation/rejection from ANAF, which will signal the inconsistencies related to the formal or substantial controls carried out on the document.

By re-entering the document, it will be possible to correct it to redirect it.

Entering an incorrect VAT number or a non-existent recipient code is grounds for rejection.

The use of a ceased VAT number is reported, but is not a reason for rejection.

7.1.12 BIDDING ACTION – PROFORMA

For documents that are susceptible to automatic transformation, the contextual action button

is enriched with other options.

Processing means the estimate converted to an invoice or invoice or a proforma note.

\

Identifiers are available in the summary of the estimates of the proforma bids to report the processed documents.

The meaning of the icons can be displayed by placing the cursor on the field:

Blue = already used , Red = unused.

7.2   ACTIONS ON MULTIPLE DOCUMENTS

Within summary views there is always the option to select multiple documents via the checkbox/check box to the left of the document.

Selecting multiple documents enables the display of the resulting actions.

7.3   DOCUMENTS RECEIVED

In Legalinvoice you can receive invoices automatically.

Documente primite

În așteptarea revizuirii

Facturi

Note de credit

Note înregistrate

Note de intrare

Note de cheltuieli

The invoices automatically delivered by Infocert will be available in the Received Documents both as Invoices or Credit Notes, and in the Documents waiting to be viewed section.
Automatic invoice delivery/delivery requires a daily email notification.

Documente primite / Facturi

☐ 1 elemente **Actualizează** **Exportă** **Copie vizualizată**						Filtre ▼
☐ 📗 **IBM GRANIT S.R.L.** Factură primită **nr. 123456**		Data contabilă 07/06/2024	Data emiterii 07/06/2024	Termen limită 07/06/2024	Total **RON** **119,00**	

👁 Previzualizare

🖨 Afișează

↓ Descarcă

✉ Trimite prin email

✓ Vedere

📄 Extras de cont

🗑 Șterge

The **View** section is for organizational purposes only; it allows you to view the document you receive, View it in the traditional way, you can Download it and possibly review it to let the tax advisor know that the document is correct and that you can treat it for accounting purposes.

After viewing, the document will be checked to notify that it has been checked and from the

Documents waiting to be viewed section goes to the Invoices section ✓

The view allows you to consult the xml electronic file in the traditional way.

By clicking on the document, you can enter the details of the document; The invoice is not editable.

If the electronic file contains the pdf produced by the supplier, it will be displayed inside the document in the attachment section.

If the electronic file contains the deadlines, it automatically feeds the passive program for managing full or partial payments through the colored context bar.

7.4   ENTRY NOTES/EXPENSE NOTES

The other sections available within the management of Received documents refer to Entry Notes or Expense Notes; are the first notes that it might be useful to write directly in Legalinvoice to

have the uniqueness of management.

Choosing will propose the list of inserted notes, double click on the line to view, edit or delete the note

7.5   PERSONAL FISE

Consultation of the data/registers is available in the form of an alphabetical list

This is through a quick search with an alphabetical keyboard.

The quick search is activated by clicking on the letter at the top left of the list.

The function applies to all types of data.

Alternatively, you can search for the data register in the search box.

Once the register is viewed, you can access it with a double click.

7.6   SUMMARY

7.6.1   FIRST NOTE

The first note section summarizes the collection transactions/payment invoices or income/expense notes manually entered on Legalinvoice. In this section you can edit the recorded movements.

7.6.2 DUE AGENDA

Payment/collection installments that have not yet been paid from invoices are highlighted in the payment deadline section. The most recent deadlines are listed first, and then the oldest ones.
For each maturity it is possible to check the date, the expiration total and possibly collected/paid.
If an invoice is issued without an expiration rate in the list, the expiration date will be the same as the accounting date of the document.

7.6.3 SETTING DEADLINES

The generation of the deadline is found in the issuance of the document.

−   **Generation of a single expiration date in the invoice issuance phase**
    At the time of issuing the invoice, it is possible to record a single deadline by selecting the collection method and the expiry date.

−   **Generating the payment plan during invoice issuance**

Alternatively, you can generate different deadlines through **the Define Payment Plan option**.

At each insertion, the system always proposes the residual value and facilitates the storage of expiration/deadline with automatic parameters in relation to the selected deadline type.

Condiții și informații de plată

Total		Descriere termeni de plată	Termen limită	Data	Plătit
lei 400,00	❓	Cheque	Dată specifică ▾	30/06/2024	Neplatit ▾ ✔

Anulează planul de plată

Once the deadline has been defined, it is essential to confirm the entry with the button ✔ .
Each deadline can be paid immediately using the Paid/Unpaid field or by selecting the colored context bar to the right of the list of deadlines.

Condiții și informații de plată

Descriere termeni de plată	Termen limită	Număr	Data	Total	
Cheque	Dată specifică		30/06/2024	lei 400,00	🖥️
Descriere termeni de plată	Termen limită Dată specifică	Număr	Data 31/07/2024	Total lei 200,00	🖥️
Descriere termeni de plată	Termen limită Dată specifică	Număr	Data 31/07/2024	Total lei 471,00	🖥️

If a collection has been handled/managed incorrectly, it is necessary to remove the collection from the document collection/payment manager.

7.6.3.1 MANAGEMENT OF RECEIPTS AND PAYMENTS

In Legalinvoice there are several ways you can record receipts and payments.

‒   **Immediate collection/payment during invoice issuance**

During the issuance of the document, before defining the possible payment plan, the procedure allows the immediate coding of a collection for the total amount.

Condiții și informații de plată

Modalități de plată	Termen limită ❓	Plătit
Debit Direct SEPA ▾	Nimeni ▾	Plătit ▾

Definiți planul de plată

‒   **Payment collection/registration, option provided in the document**

The management of receipts can be recalled in the document that acts in accordance with the section provided for this purpose

➕ Înregistrează încasare

Opening management allows the necessary fields to generate a complete accounting operation.

Încasări

INCASAT	DE ACHITAT	EXCEDENT
lei 0,00	lei 1.071,00	lei 0,00

+ Înregistrează încasare

This option allows you to manage a partial collection and independently store the currency date and the account to be used for accounting entry.

Total		Data valută	Banca/cont	Modalități de plată		
lei 600,00		22/06/2024		Cash	✓	✕

After the collection is stored, the option to edit or delete is always available.

✎ Modificare

🗑 Eliminați
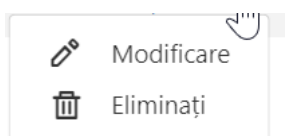
— **Collection/payment from the selectable context bar at each point of the app**

In sections where documents are listed, there is always the context bar that highlights paid deadlines in Green, unpaid and unexpired deadlines in Yellow, and expired deadlines in Red.

Documente emise / **Facturi**

☐ 5 elemente **Actualizează Exportă Copie vizualizată**   Filtre ▼

				Data contabilă	Termen limită	Total RON	
☐	📄	ABC nr. 6/2024		22/06/2024	30/06/2024	1.071,00	💳
☐	📄	ABC nr. 4/2024		21/06/2024	-	1.071,00	💳
☐	📄	ABC nr. 3/2024		18/06/2024	18/06/2024	535,50	💳

Selecting the collection term opens a summary window containing all expirations/deadlines and the possibility to manage the payment for the total amount.

This option only allows Collections/Payments for the total amount of the due date, if partial receipts were previously handled on the individual due date, it is necessary to complete the Cash Entry/Payment operation.

INFOCERT
TINEXTA GROUP

The summary of collection/payment transactions can be analyzed in the Payment Term and Statement options.

7.6.3.2 EXTRAS DE CONT

Action available in each document list within the action button.

The statement view provides all customer/vendor related documents organized by deadline/expiration date.

The colored bars immediately identify the status; Selecting a deadline always opens the document.

7.6.4 DOCUMENT RECURENT

This section summarizes the self-issuing documents.

7.6.5 INPUTS/OUTPUTS

The dashboard provides a graphical display of the inputs and outputs recorded through different types of documents.
The summary is divided by month and shows the totals by document type.
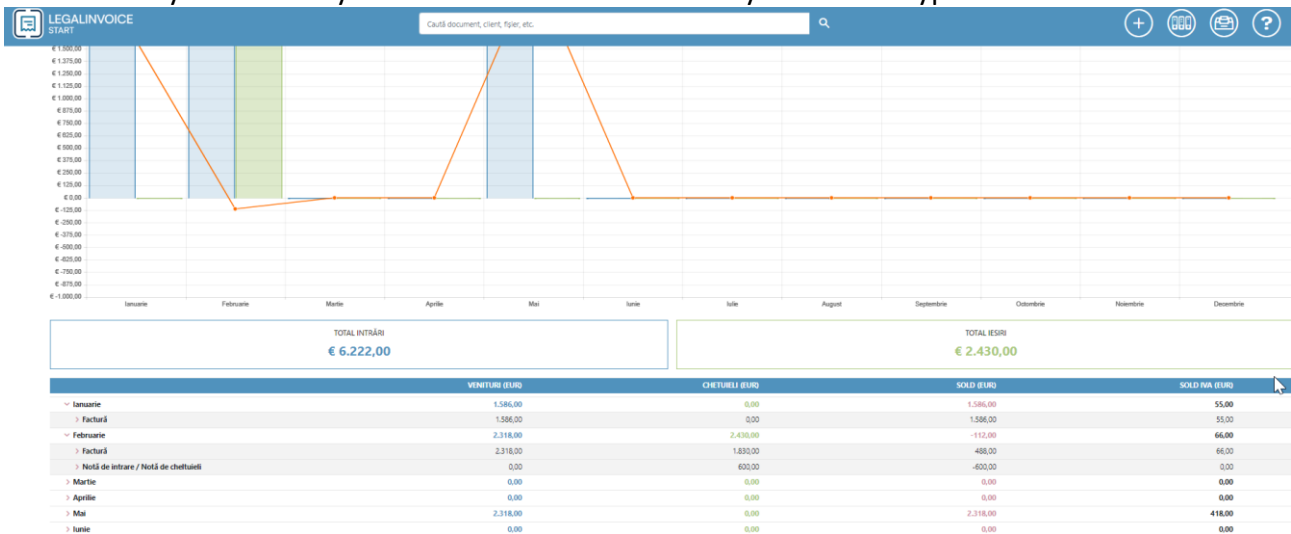
7.6.6 CASH FLOW

The dashboard provides a summary of cash flows broken down by periods with totals by credit/debt status.
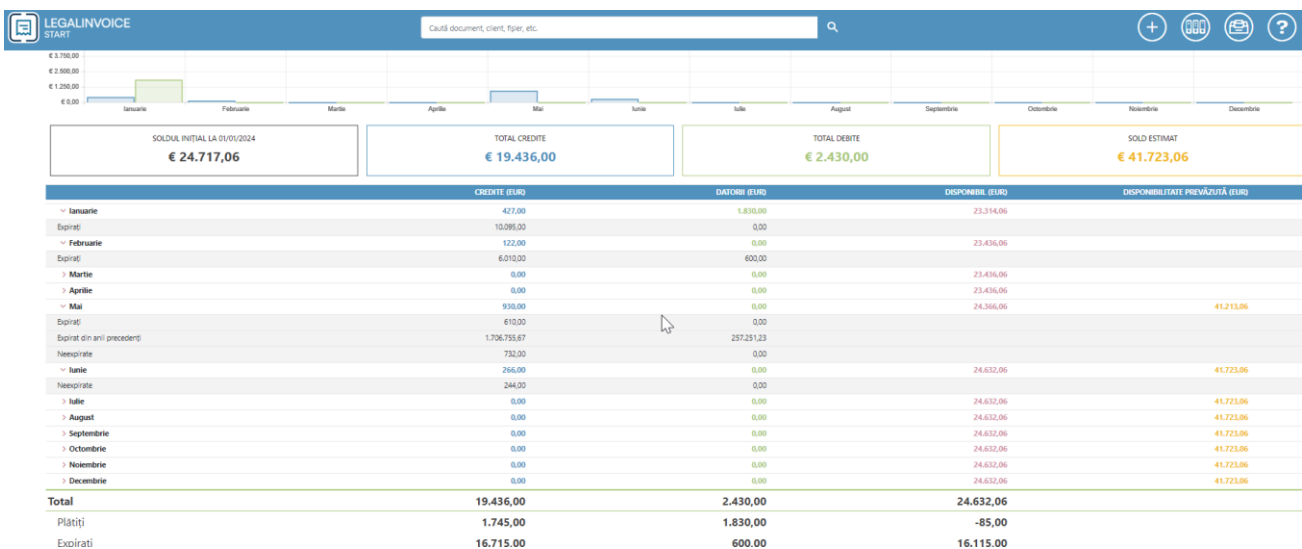
7.6.7 VAT

The scoreboard that exclusively represents the algebraic balance between VAT on credit and VAT on debit transited on the invoice.
The data is broken down by month and VAT code type.
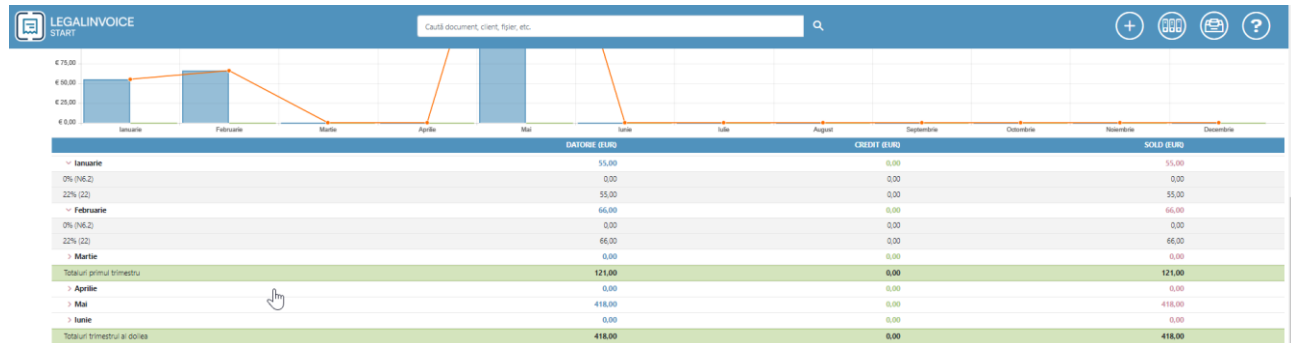
7.6.8

The dashboards are graphical summaries to provide brief information about Revenue/Expense, Cash Flows and VAT Summaries.
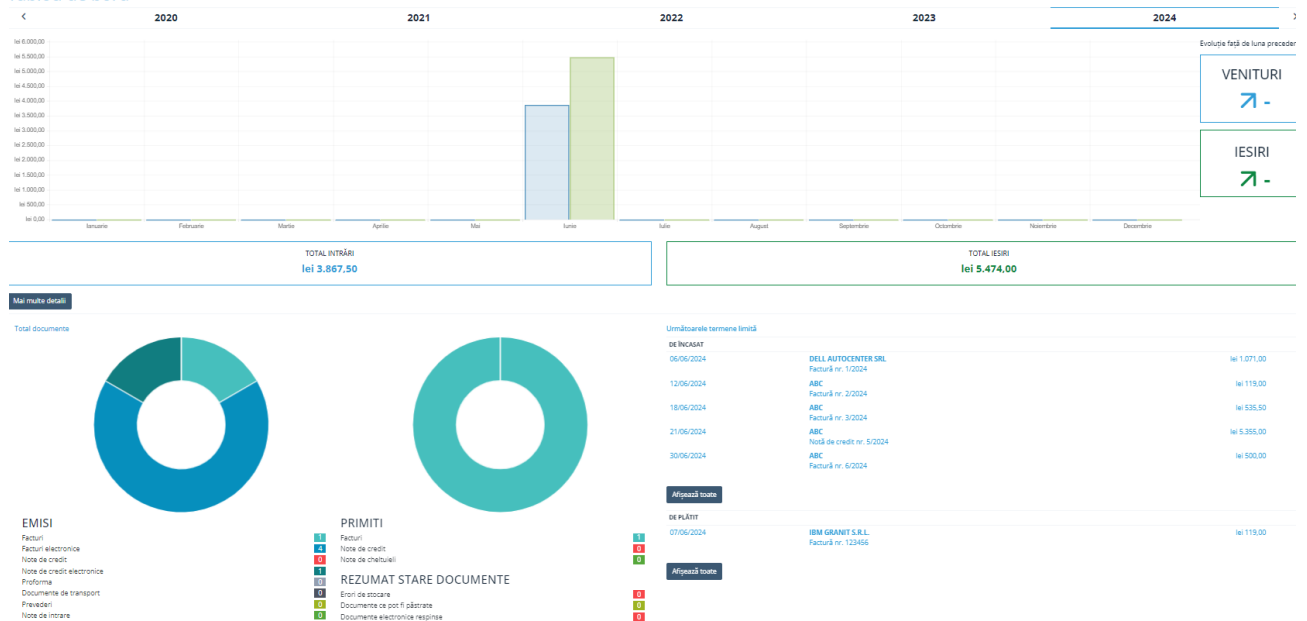
8 **TOOLS**

The Tools section summarizes several document-related management features.

8.1.1 DOCUMENTS

The function displays documents that the system has generated as a result of procedural extractions (Export Function) or that have been uploaded by users with the upload function. Summary extracts or other invoices, from any function, are kept by the system in this section.

Arhivă **documente**

Utilizați 0,00 MB din 1000 MB

Selectează un fișier sau trage-l aici pentru a-l încărca

☐ 1 elemente **Actualizează**

☐ test.zip
    Dimensiuni 1,85 KB

8.1.2 EXPORT

Within the Export option, several export paths are predefined; especially customers, vendors, and file list.

Exportare **date și documente**

Îți reamintim că în multe secțiuni este posibil să solicitați exportul datelor afișate, eventual filtrate în funcție de nevoile tale, făcând clic pe comanda Exportă prezenta imediat sub titlul paginii.

Configurează exportul

Ce să exportați

Clienți/furnizori ▾

Clienți/furnizori
Produse/servicii

✓ Exportă

8.1.3 USER MANUAL

In this section the manual is available in pdf format.

8.1.4 SHARING ENVIRONMENT

Active actions can be found in this workspace.

8.1.5 HISTORIAN

The historical summary of the events tracked by the system.

9 GENERAL FUNCTIONS

9.1   VIEWS - FILTERS - EXPORT

The procedure, in all management options, presents a list of documents that can be organized on the screen using the search buttons.

In all summary views where a list of documents is displayed, the **Filters** Filtre [icon] option is always available with multiple icons and the **Export option.**

Documente emise / **Facturi**

Agendă de scadențe

To open the filters option, use [icon] the button to close the option, use the bottom right button, [icon] to reset the drag button [icon]

The down and up keys allow you to change the order of the list relative to the active calendar

The list of documents can be sorted by macro groupings, such as period, document type, or status.

By clicking on grouping, the filter is activated and displayed in the search section, and x is deleted

Documents can also be identified in good time by using the filter and the search field, for example, to quickly find a document number or a customer.

The Export button is available in every view.

Activating the command, a dialog appears in which you can name the zip file that will be exported and choose whether to integrate the data or documents possibly attached into the export. The file format will be an xls sheet.

The procedure processes the file and, at the end, stores it in the document archive available in Legalinvoice and sends it by e-mail to the address stored in the user profile that requested the extraction (mail di account)

For example, exporting issued invoices requires pdf, xml, and xls sheets containing the details

9.2   SEARCHES

In managing searches, it is necessary to take into account a few tricks completed in the punctual search for the information available in START.

The use of the tag "code:"xxxx can be used to get different types of research:

--> Search by a specific code containing, for example, 23 of the invoice number:
  Code:23
Returns: **23**, **23**/2019, 123-2019

--> Search by invoice numeric code:
  code:"23"

Returns: **23**

--> Search by suffix code. For example, the year 2019:
Code:*/2019

Returns: 1**/2019**, 2**/2019**. 54-2847E123**/2019**

You can also combine fulltext search with code search, e.g. code:*/2019 rossi

9.3   FISCAL YEAR CHANGE

The transition to the management of the new year is done naturally by issuing the first invoice with the next exercise date.

After this problem, by selecting the proposed year by default in the left sidebar, it will always be possible to consult both the current year and the previous year.
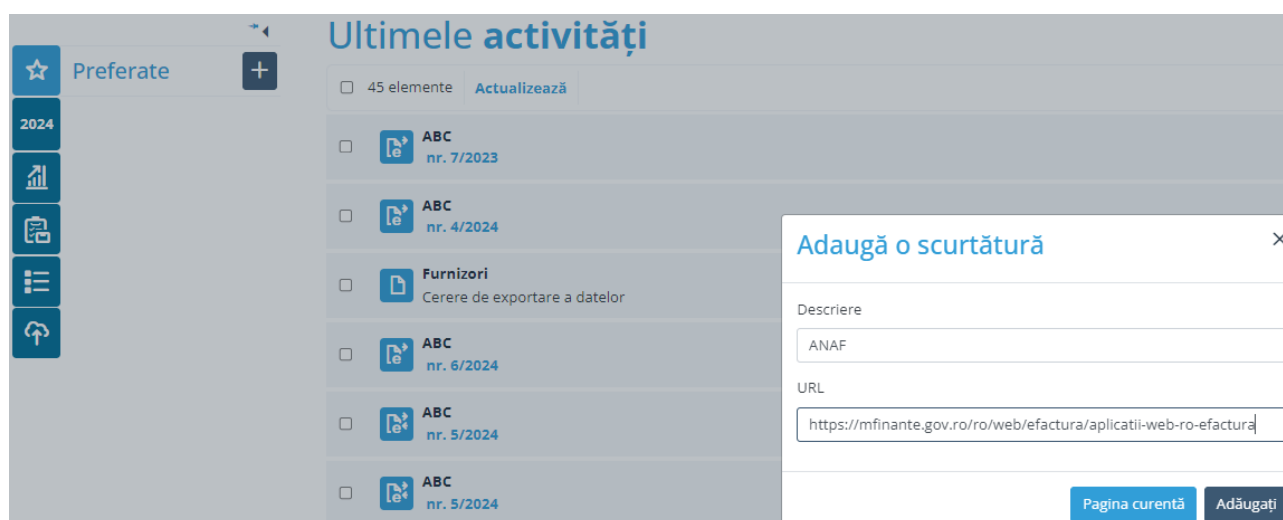
In all viewed document queries (Invoice List, Estimates, etc.) it is the fiscal year parameter used to determine the year of the listed documents.

9.4   FAVORITE

Access to favorites is available on every page of the app and allows you to store both Legalinvoice menu functions and external public links.

By pressing the **+** button you can type an external url

or confirm the current page you're on as a favorite.