

04

Customer Invoice to Payment

Odoo 19 Enterprise · Accounting

This chapter covers the complete lifecycle of a customer invoice from creating a draft through to payment and automatic reconciliation. Every person who raises invoices or records payments will use this flow daily.

1 View your invoice list

Accounting > Customers > Invoices

All customer invoices are accessible from the Customers menu. The list shows status, amounts, and payment state at a glance. Use the filters to narrow by date, status, or customer.

2 Create a new invoice

Accounting > Customers > Invoices > **NEW**

Click New to open a blank draft invoice. Fill in the header fields first the Customer field is required before you can save.

INVOICE HEADER FIELDS

Customer *	Select an existing contact. Typing creates a new contact on the fly.
Invoice Date	Defaults to today. Set a specific date if backdating is required (subject to lock dates).
Payment Terms	Overrides the due date. If left blank, the Due Date field appears for manual entry.
Journal	Defaults to Customer Invoices. Change only if the company uses multiple sales journals.
Currency	Defaults to the company currency. Multi-currency invoices are supported if enabled in settings.

3 Add invoice lines

Accounting > **Customers** > **Invoices** > **Invoice Lines**

Under the Invoice Lines tab, add one row per product or service. Click Add a line for each item. The tax and account fields populate automatically from the product configuration.

INVOICE LINE FIELDS

Product	Selecting a product auto-fills description, account, and default tax.
Description	Editable label that appears on the printed invoice.
Quantity	Defaults to 1. Enter the billed quantity.
Unit Price	Pulled from the product pricelist. Edit if needed.
Taxes	Applied automatically. For Malaysian companies, SST tax groups appear here.
Account	Revenue account from the product. Override only if posting to a different account.

Other Info tab contains Customer Reference (shown on printed invoice), Salesperson, Recipient Bank, and Fiscal Position. Fill in the customer reference if your customer requires it on their payment advice.

4 Confirm the invoice

CONFIRM

Click Confirm to post the invoice. This locks the lines, assigns the invoice number, and creates the journal entry. Status changes from Draft to Posted. Once posted, lines cannot be edited. To correct an error, use Reset to Draft, correct, then confirm again.

Preview before confirming Click Preview to see exactly what the customer will receive as a PDF. This is the safest moment to catch formatting or amount errors.

5 Send to the customer

SEND & PRINT

Click Send & Print to open the send dialog. Odoo prepopulates the email using the customer's configured address and a built-in template.

SEND DIALOG OPTIONS

Print	Generates a PDF copy for your records or for posting.
Email	Sends the invoice PDF as an attachment. Edit the subject and body before sending.
Recipients	Defaults to the customer's email. Add CC addresses if required.
Template	Use an existing email template or save a new one for future invoices.

6 Register the payment

REGISTER PAYMENT

When the customer pays, click Register Payment. Fill in the details and click Create Payment. Status moves to In Payment.

PAYMENT DIALOG FIELDS

Journal *	Select Bank, Cash, or whichever journal matches how the customer paid.
Payment Method	Typically Manual. Batch Deposits or SEPA available if configured.
Amount	Defaults to the outstanding balance. Edit for partial payments.
Payment Date	The date the payment was received – important for reconciliation.
Memo	Optional reference. Appears in the journal entry and helps with bank reconciliation.

Partial payments – If the customer pays less than the full amount, enter the partial amount and confirm. The invoice shows both paid amount and remaining balance. Multiple payments can be registered against the same invoice.

7 Reconciliation and final status

Accounting – Accounting – Reconciliation

The invoice status changes to Paid automatically once the payment is matched to the corresponding bank statement line. Until reconciliation is complete the status shows In Payment – the invoice is closed for practical purposes but awaiting bank statement confirmation.