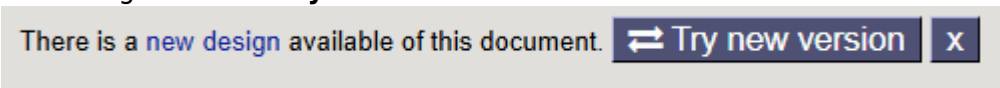
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GENERAL PRINCIPLES OF THE NEW PURCHASE INVOICE VIEW

The new design of the purchase invoice is ready to use! Open a purchase invoice and switch on the new design with the **Try new** button in the document header.



Please pay attention and make sure that everything works as you expect on the new document. Not all functionality has been moved to the new design yet, and some actions work slightly differently.

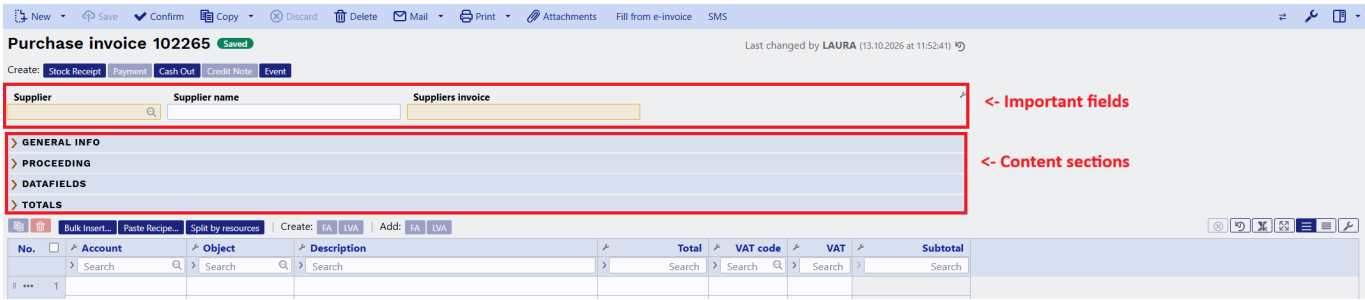
General instructions for using documents with the new design can be found **HERE**.

Content sections

On the purchase invoice fields are divided into sections: **General Data, Proceeding, Datafields** and **Total**.

Click a section heading to show or hide the section. Directo remembers your choice the next time you open the card.

- **Selecting fields** - under the **wrench** icon “Field settings” on the right edge of each section, you can choose which fields are visible on the document. As there are a lot of fields, most of them are hidden by default, and each user can display only the fields they need.
- **Important fields** - the field selection window has a separate group “Important fields”, which brings the most important fields to the top of the list.

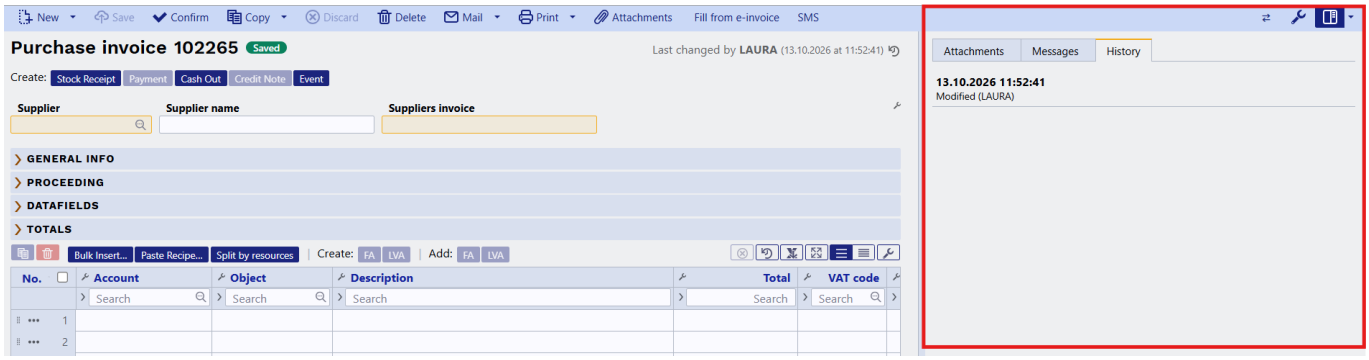


Sidebar

On a saved purchase invoice, you can open the **sidebar** by clicking the **Show side panel** icon in the header.. The sidebar has separate tabs: **Attachments, Messages and History.**

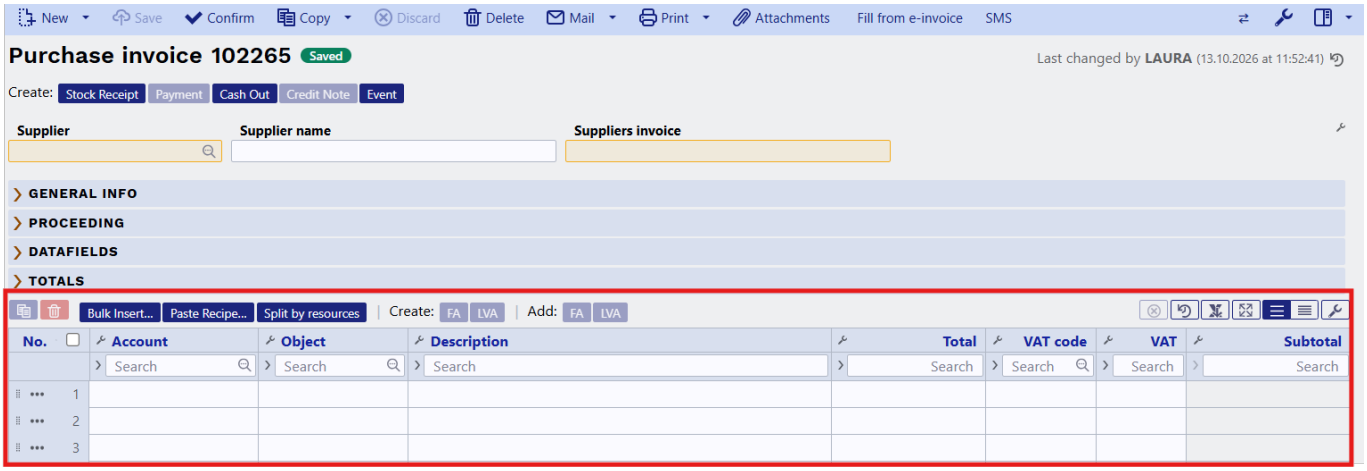
Next to the icon you can also choose whether the panel is on the right side of the card or below it. Directo remembers your choice for the next document of the same type.

The History page shows actions performed on the purchase invoice (e.g. confirmation, cancellation of confirmation) together with the user, time and result (“succeeded” / error message). It also shows information about follow-up documents created from the document and about the creation of the document itself (e.g. if the purchase invoice was created as a copy or as a follow-up document).



Document rows

- **Sort, filter, search and replace** - you can sort by any column, filter by one or several columns, etc.
- **Bulk insert** - it contains the fields you have selected for the document rows, in exactly the same order.
- **NEW! Rows to Excel** - you can now export the rows to Excel with the click of a button.
- **NEW! Long document** - you can add more than 2000 rows to the new document.



If you notice an error, find that usability has suffered somewhere, or have a good suggestion, please send us feedback by e-mail at info@directo.ee.

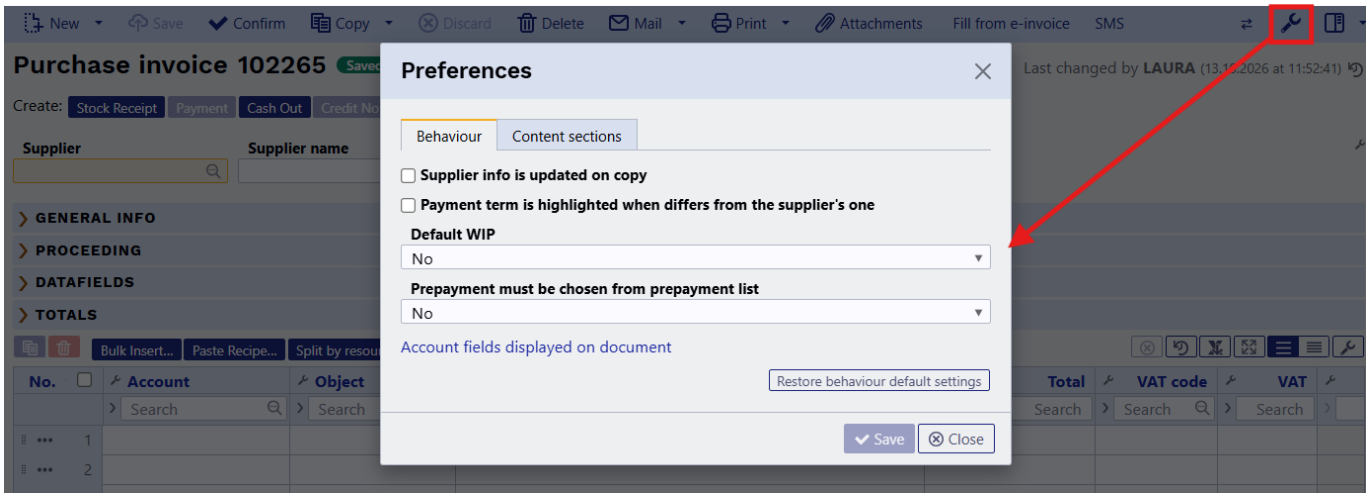
If you wish, you can switch back to the old view using the arrow icon on the right edge of the header (“Switch to old view”).

Purchase invoice view settings

The large wrench icon in the upper right corner of the header opens the **“Page settings”** window, which has two tabs:

Behaviour

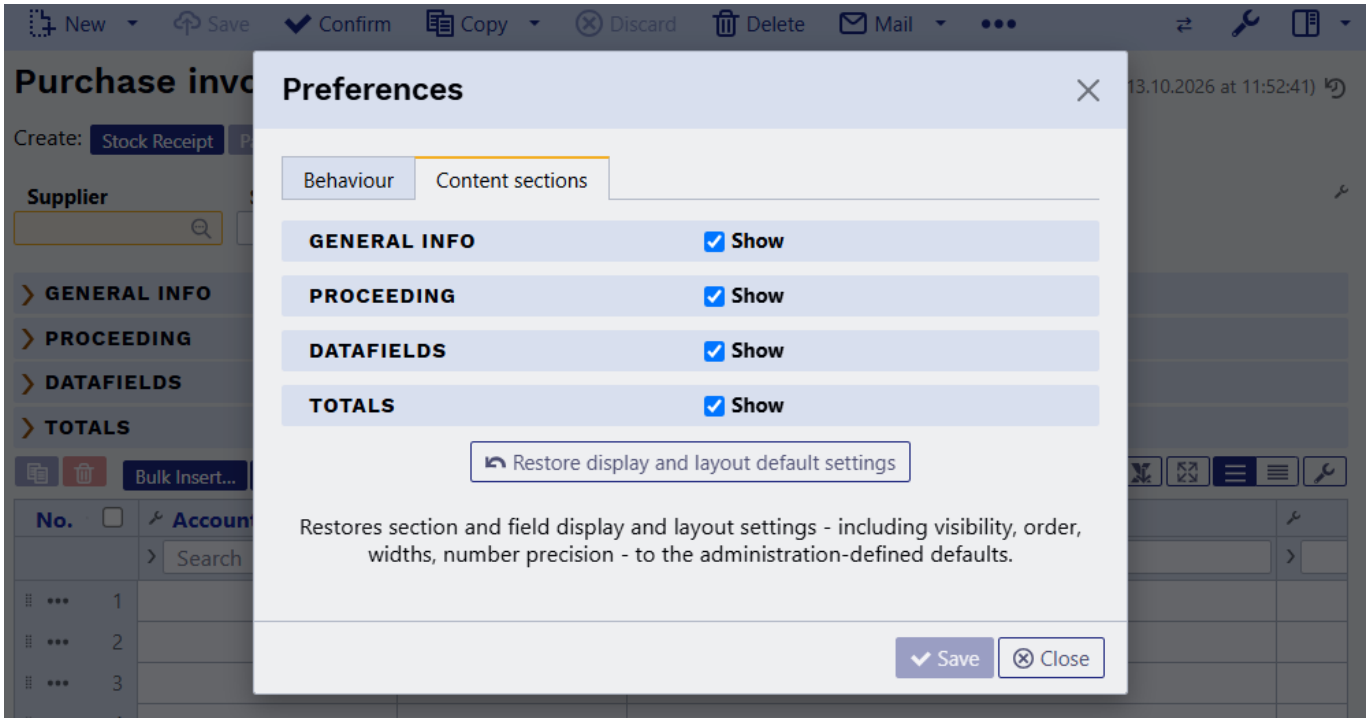
- **Supplier info is updated on copy** - if the supplier card has been changed in the meantime, the copy of the purchase invoice is filled with the current values from the supplier card (e.g. a changed bank account)
- **Payment term is highlighted when differs from the supplier's one** - if the supplier card has a different payment term than the invoice
- **Default WIP** - set automatically for all filled rows (status work in progress).
- **Account fields displayed on document** - various account fields, including additional fields, can be displayed on the purchase invoice rows
- **Restore behaviour default settings** - restores all behaviour options to their default settings



Content sections

On this tab, you can tick whether a content section is shown on the document at all. The **“Restore display and layout default settings”** button restores the display and layout of sections and fields (visibility, size, order, precision) to the defaults set by the administrator.

To apply the changes, click **Save**.



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