

Bug [31115](#): Additional fields for invoices

Text to go in the release notes

This new feature adds the ability to define additional fields to store information about vendor invoices.

There is a new 'Manage invoice fields' page in the acquisitions administration to configure the fields.

Users can name additional fields, tie them to authorised values, and specify whether the fields can be searched in the acquisitions module.

This also adds a new entry to the admin page for additional fields.

Use case

Paying invoices is handled by our institution's Enterprise Resource Planning (ERP) system. Invoices must therefore be exported from Koha to the financial system (SAP). We also want to receive confirmation about the payment status.

For this use case and the synchronization between Koha and SAP we need additional fields in invoices.

Hints

There is no need to migrate existing invoices.

This new feature is based on the following tables, there is no need to change the database schema

| | |
|-------------------------|---|
| aqinvoices | https://schema.koha-community.org/22_05/tables/aqinvoices.html |
| additional_fields | https://schema.koha-community.org/22_05/tables/additional_fields.html |
| additional_field_values | https://schema.koha-community.org/22_05/tables/additional_field_values.html |

Configuration

- New entry in Administration > Manage additional fields


Administration > Manage additional fields

preferences
system preferences
parameters
libraries
library groups

Additional fields

Select a table:

- Order baskets (aqbasket)
- Subscriptions (subscription)
- Invoices (aqinvoices)



- Add new field

← → ↻ 🏠 https://koha.adminkuhn.ch:8443/cgi-bin/koha/admin/additional-fields.pl?op=add_form&tablename=aqinvoices

Circulation Patrons Search [Cart](#) [More](#)

koha Enter search keywords:

[Check out](#) [Check in](#) [Renew](#) [Search the catalog](#)

Home > Administration > Manage additional fields > Add field

System preferences
System preferences

Basic parameters
Libraries
Library groups
Item types
Authorized values

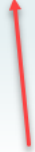
Patrons and circulation
Patron categories
Circulation and fines rules

Add field

Name: *Required*

Authorized value category:

Searchable: ☒



- List additional fields for aqinvoice

Home › Administration › Manage additional fields › **Modify fields for 'aqinvoices'**

System preferences

- › System preferences

Basic parameters

- › Libraries
- › Library groups
- › Item types
- › Authorized values

Patrons and circulation

- › Patron categories
- › Circulation and fines rules
- › Patron attribute

+ Create field

Additional fields for 'aqinvoices'

| Name | Authorized value category | Searchable | Actions |
|-----------------|---------------------------|------------|---|
| Department | LOC | Yes | Edit Delete |
| Export finished | YES_NO | Yes | Edit Delete |
| Export needed | YES_NO | Yes | Edit Delete |
| SAPnumber | | Yes | Edit Delete |

Showing 1 to 4 of 4 entries Show entries < Previous Next > Search:

- Acquisition administration

Home › **Acquisitions**

Acquisitions

- › **Acquisitions home**
- › Late orders
- › Suggestions
- › Invoices
- › EDIFACT messages

Reports

- › Acquisitions statistics wizard
- › Orders by fund
- › Hold ratios

Administration

- › Budgets
- › Funds
- › Currencies
- › EDI accounts
- › Library EANs
- › Manage order basket fields
- › **Manage invoice fields**

+ New vendor

Acquisitions

Manage orders

Vendor:

Using additional fields in invoices

Edit Invoice

Home > Acquisitions > Invoices > R1111

Acquisitions

- Acquisitions home
- Late orders
- Suggestions
- Invoices
- EDIFACT messages

Reports

- Acquisitions statistics wizard
- Orders by fund
- Hold ratios

Administration

- Budgets
- Funds
- Currencies
- EDI accounts
- Library EANs
- Manage order basket fields
- Manage invoice fields

Invoice: R1111

Vendor: KIT

Invoice number:

R1111

Required

Shipment date:

05/07/2022

×

(DD/MM/YYYY)

Billing date:

04/07/2022

×

(DD/MM/YYYY)

Shipping cost:

0.00

Shipping fund:

No fund

Show inactive:

☐

Status:

Open

Close:

☐

Save

Delete

Additional fields

SAPnumber:

Export needed:

All

(Authorised values for YES_NO)

Department:

All

(Authorised values for LOC)

Export finished:

All

(Authorised values for YES_NO)

Adjustments

+ Add an adjustment

Update adjustments

[Go to receipt page](#)

Invoice details

| | |
|--|---------------|
| | No orders yet |
|--|---------------|

Searching invoices with additional fields

- Search for invoices with additional fields

Test plan

1. Create a Vendor (under Acquisition -> New Vendor).
2. Create a Basket
3. Apply patch.
4. Visit Additional fields under administration, and verify that the option for invoices exists
5. Create at least four fields for aqinvoice for each combination of searchable/not-searchable and with/without an authorized value.
6. Create a Vendor invoice (-> Receive shipment) , and verify that all fields are visible and correctly save.
7. Edit the invoice, verifying that changes to these additional fields are saved.
8. Search the invoice by using an additional field (Acquisitions > Invoices)
9. Verify that only the searchable fields show in the form, and that their contents may be searched.

See also [Bug 15774](#)

Search filters

Invoice number

Vendor:
All

Shipment date

From:
  
(DD.MM.YYYY)

To:
  
(DD.MM.YYYY)

Billing date

From:
  
(DD.MM.YYYY)

To:
  
(DD.MM.YYYY)

ISBN / EAN / ISSN:

Title:

Author:

Publisher:

Publication year:

Library:
All

SAPnumber:

Export needed:
All

Export finished:
All

Department:
All

Invoices

Use the search form on the left to find invoices.

searchable
fields