

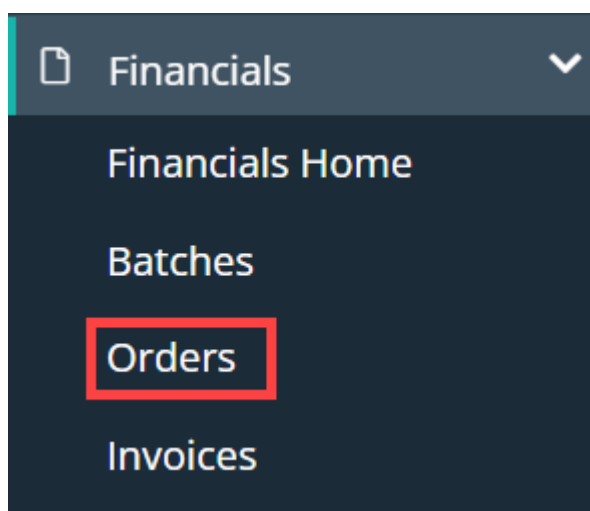
[NOVA] How do I create a new invoice/order?

Marina N.B. - 2025-09-24 - [Financial](#)

The Financials module in Nova allows you to create new invoices or orders, view their details including the status and amount, search with filters and export the results.

Creating a new invoice/order

1. Log in to your club's website by following the [steps in this article](#).
2. Navigate to **Financials** tab, then go to the **Orders** tab.



3. Click on the **+Add** button on the right-hand side, just above the Invoices/Orders list.

Orders

A screenshot of the 'Orders' section in the ClubRunner interface. It shows a light blue filter panel with various search criteria like Date, Customer, Types, Linked To, Has Customer, Has Shipping Contact, Date Range, Order No, Status, Tags, Has Links, and Has Billing Contact. Each criterion has a dropdown or input field. To the right of the filter panel is a blue 'Update Results' button. Below the filter panel, there is an 'Export To Excel' button, a 'Display 25 orders' indicator, and a green '+ Add' button. A red arrow points down to the '+ Add' button, which is also highlighted with a red rectangular box.

4. You will be taken to the Create Order page, where you can set up initial information about the invoice:

- Customer - Select a member or contact that will be billed.
- Linked To - This field is optional and used if the bill is related to someone else also listed in your club's records.
- Status - You can select **Quotation** if the invoice will be finalized after the customer reviews it, otherwise you can select **Active**.
- Date - This is the date of the invoice/order.
- Order Number - This is generated by the system and cannot be edited.

Create Order

Order Details

Customer *	<input type="text" value="Adele Pordal"/>
Linked To	<input type="text" value="Mary Doe"/>
Status	<input type="text" value="Quotation"/>
Date *	<input type="text" value="May 14, 2025"/>
Order Number	2487

Cancel

Save

Viewing and editing order/invoice details

Once you click **Save**, you will be taken to the Order page that holds all the information about the invoice in separate sections that can be easily edited and updated with additional information.

1. At the top, you can see the order details such as its number, total and balance amounts, status, as well as the link to the individual's profile on the club's website. Above these details at the top right-hand side corner, you'll find several actions available for this order such as the option to email the order to the person being billed, print, cancel or delete, or the option to activate the order if you are viewing a quotation.
2. The Billing Information, Details and Invoice Settings sections will pull the details from the individual's profile, but this can be updated in case the billing address is different from the address in the database. This section allows you to add a Shipping address, too.

BILLING INFORMATION

Edit

Customer: Adele Pordal

Address:

Phone:

Email: Adele-Pordal@sink.sendgrid.net

Bill to: Adele Pordal

Billing Address:

Bill To Email: Adele-Pordal@sink.sendgrid.net

Ship to: Adele Pordal

Shipping Address:

Ship To Email: Adele-Pordal@sink.sendgrid.net

DETAILS

Edit

Linked To: Mary Doe

Status: Quotation

Date: May 14, 2025

Tags: frequent buyer

Purchase Number: 00002487-01

Memo: Adele would like to purchase more of these products

INVOICE SETTINGS

Edit

Invoice Date: May 14, 2025

Payment Terms: 30 Day(s)

Due Date: Jun 13, 2025 (Based on Payment Terms)

- The Details section can be updated with a bit more information, such as tags, purchase number, or memo. Tags added for invoices are separate from member and contacts tags.
- Invoice Settings allows updating the invoice date and the due date, which can be either based on payment terms (certain time since the invoice was created) or based on a fixed date.

Edit Invoice Settings

×

Invoice Date * May 14, 2025

Due Date * Based on Payment Terms 30 Day(s)

If value is 0, then payment is due upon receipt.

☐ Fixed Date

Cancel

Save

- The Active Items section allows you to perform several actions while adding lines to your order/invoice.

Adding items and generating the invoice/order

ACTIVE ITEMS						<div> <div>Generate Invoice</div> <div>Apply Promotion</div> <div>Add Item</div> </div>
ITEM DESCRIPTION	START DATE	END DATE	QTY	PRICE (USD)	SUBTOTAL (USD)	
Active - Membership	Jul 01, 2025	Jun 30, 2026	1	150.00	150.00	⌵
Meals - Standard Breakfast			4	20.00	80.00	⌵
Pin with the Rotary International logo			3	5.00	15.00	⌵
Total:					245.00	

+Add Item - Click this to add items that will be part of this invoice/order, which are added to the system and modified from the **Financials -> Products** tab on the left-hand side menu. Adding an item allows you to select a type, add a custom description, input price and quantity. Once items are added, a total amount will be calculated in this section, and each of them will have a **drop-down action arrow** on the right-hand side that allows you to either **Edit** or **Delete** them.

Add Order Item



Type

Product

Product

Meals

Product Option

Standard Breakfast

Description *

Meals - Standard Breakfast

Price (USD)

20

Quantity

4

Cancel

Save

Apply Promotion - This button opens a window with a field where a promotion code can be entered. Once you click **Save**, the promotion will be applied to the order/invoice.

Apply Promotion

Promotion code *

Cancel

Save

Generate Invoice - When you have completed creating the invoice, click the **Generate Invoice** button. The page will refresh after a few seconds and your order/invoice will be generated, with the status automatically changed from Quotation to Active. A new section called Payment Details will appear at the bottom of the page. Here you can use the right-hand side actions drop-down arrow to view the invoice, export it as PDF, email it, and pay it online, as an administrator, or by manually logging the transaction. After the invoice has been generated, the button Generate Invoice will now be replaced with **View Invoice**, which will pop-up a preview of Invoice Details.

PAYMENT DETAILS

DATE	TRANSACTION TYPE	REFERENCE	AMOUNT (USD)	STATUS	
May 28, 2025	Cash		100.00		
May 28, 2025	Invoice	1002482	245.00	Partially Paid	

© 2002–2025 All rights reserved.
[Privacy Statement](#) | [Cookie Policy](#) | [Online Help](#) | [System Requirements](#)

Email Invoice

View PDF/Print

Pay as Admin

Pay Online

Log Transaction