

Training Document

How to Print or Email a Customer Invoice or Credit Note in AR



In this lesson you will learn about using the Accredo system.

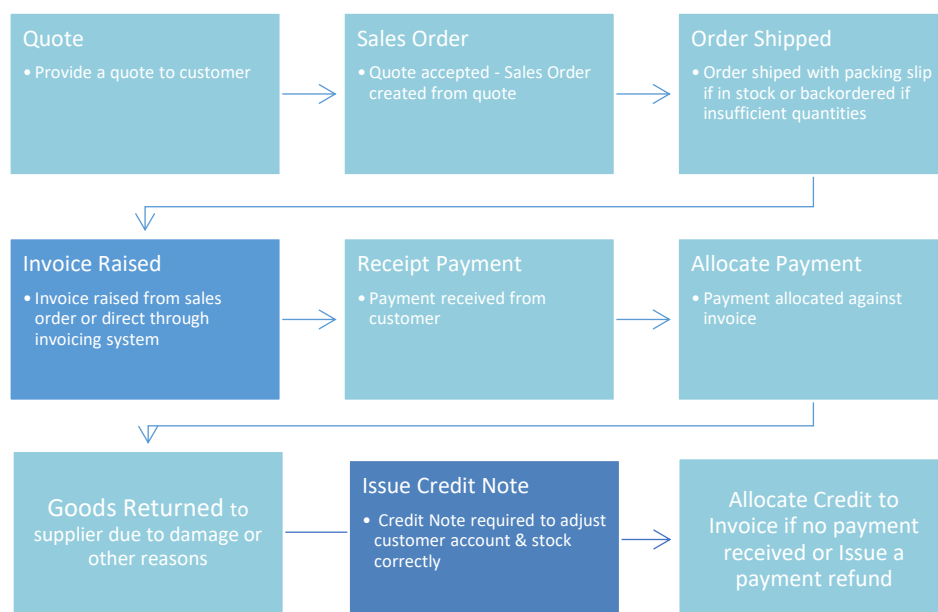
After completing this lesson you will be able to:

- Print an Invoice or Credit Note
- Email an Invoice or Credit Note


Contents

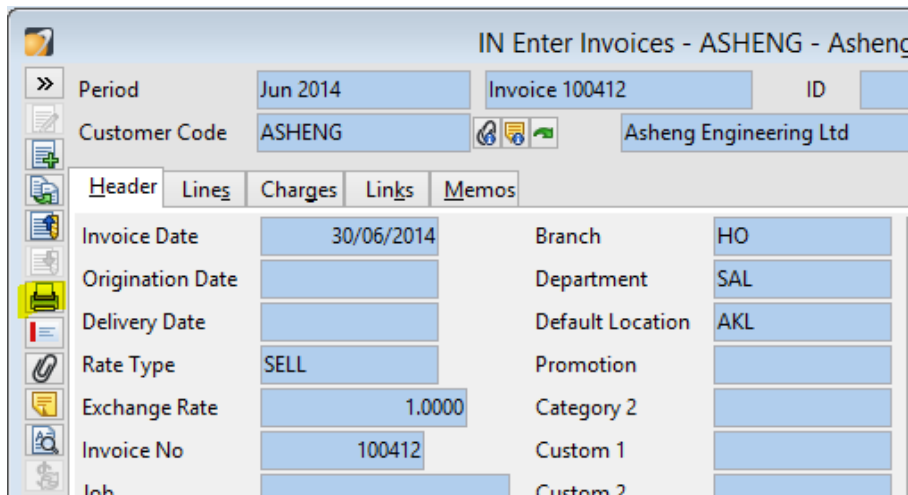
Process flow	2
Printing / Emailing Invoices.....	3
Emailing Invoices.....	4
Contact.....	6

Process flow



Printing Invoices and Credit Notes

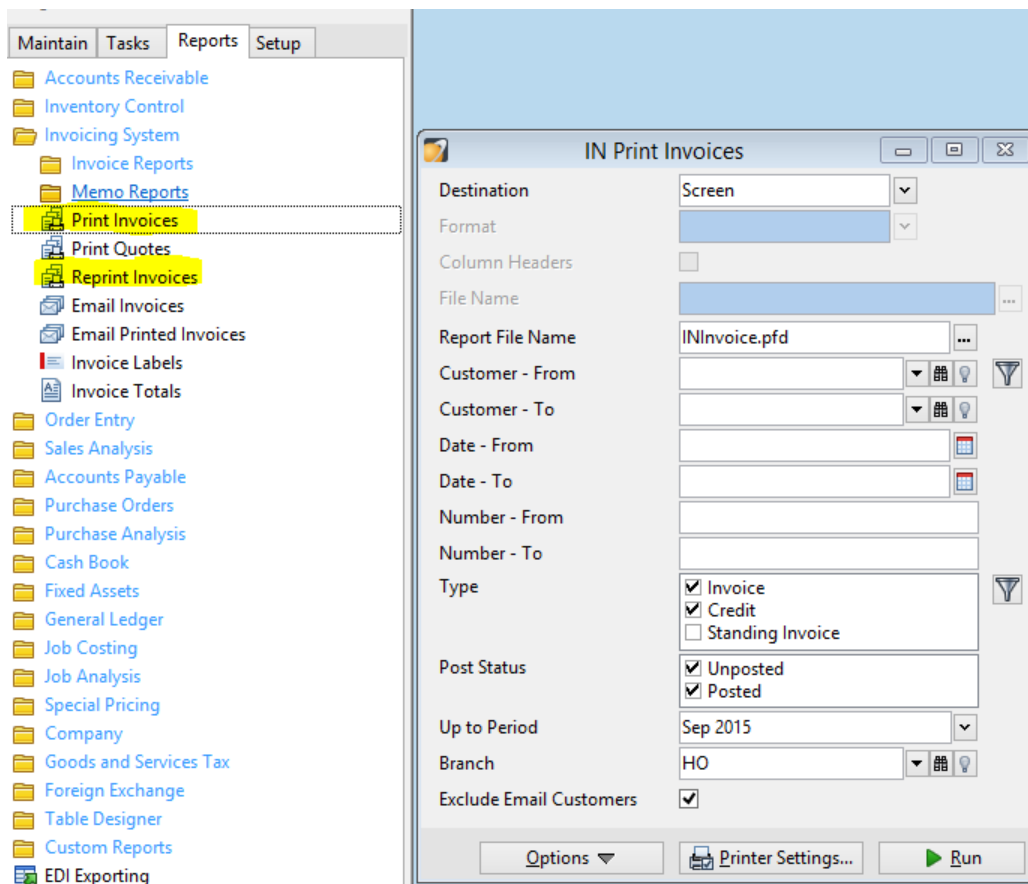
To Print an individual invoice click on the print button  (Ctrl + P)



IN Enter Invoices - ASHENG - Asheng			
Period	Jun 2014	Invoice 100412	ID
Customer Code	ASHENG	Asheng Engineering Ltd	
Header Lines Charges Links Memos			
Invoice Date	30/06/2014	Branch	HO
Origination Date		Department	SAL
Delivery Date		Default Location	AKL
Rate Type	SELL	Promotion	
Exchange Rate	1.0000	Category 2	
Invoice No	100412	Custom 1	
Job		Custom 2	

To print a batch of invoices go to Reports \ Invoicing System \ Print Invoices and select from the options.

If you are wanting to print invoices that have already been printed previously go to Reports \ Invoicing System \ Reprint Invoices

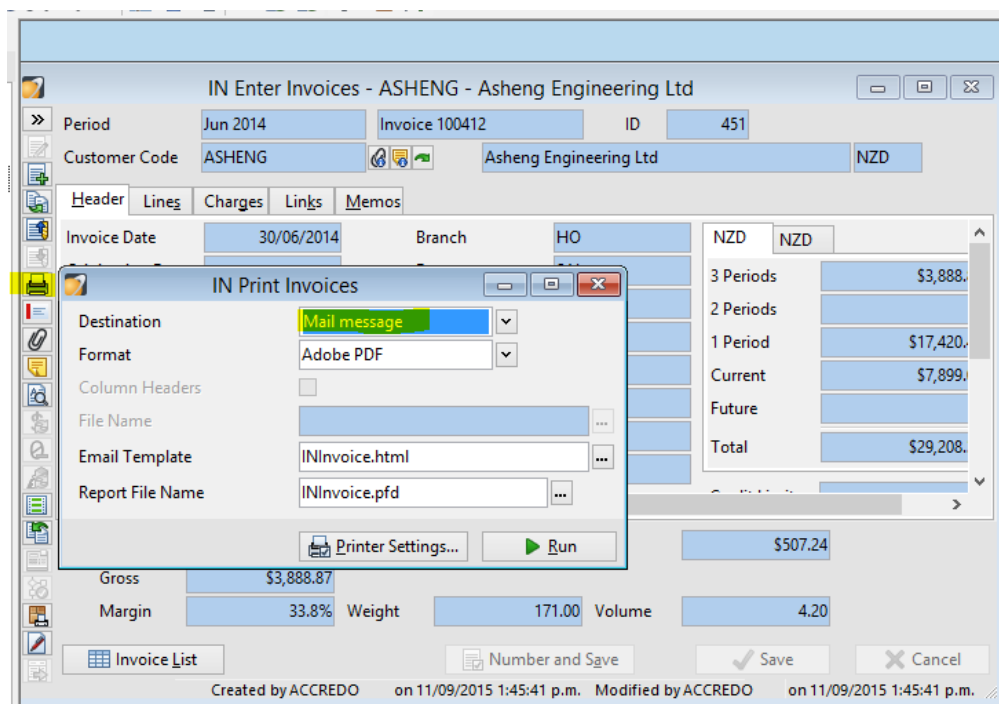


IN Print Invoices	
Destination	Screen
Format	
Column Headers	<input type="checkbox"/>
File Name	
Report File Name	INInvoice.pfd
Customer - From	
Customer - To	
Date - From	
Date - To	
Number - From	
Number - To	
Type	<input checked="" type="checkbox"/> Invoice <input checked="" type="checkbox"/> Credit <input type="checkbox"/> Standing Invoice
Post Status	<input checked="" type="checkbox"/> Unposted <input checked="" type="checkbox"/> Posted
Up to Period	Sep 2015
Branch	HO
Exclude Email Customers	<input checked="" type="checkbox"/>
Options ▼ Printer Settings... Run	

Note: If an Invoice has previously been printed to screen the system considers it to be printed. Use print preview if you are not actually printing.

Emailing Invoices

To email a copy of an invoice directly from the invoicing screen click on the Print button and choose Mail Message



To Email a Batch of Invoices go to Reports \ Invoicing System \ Email Invoices.

Consolidate Emails option will put all invoices for a customer into one email with each invoice as a separate attachment.

Navigator

Maintain Tasks Reports Setup

- Accounts Receivable
- Inventory Control
- Invoicing System
 - Invoice Reports
 - Memo Reports
 - Print Invoices
 - Print Quotes
 - Reprint Invoices
 - Email Invoices
 - Email Printed Invoices
 - Invoice Labels
 - Invoice Totals
- Order Entry
- Sales Analysis
- Accounts Payable
- Purchase Orders
- Purchase Analysis
- Cash Book
- Fixed Assets
- General Ledger
- Job Costing
- Job Analysis
- Special Pricing
- Company
- Goods and Services Tax
- Foreign Exchange
- Table Designer
- Custom Reports
- EDI Exporting
- File Exporting
- View Saved Report

IN Email Invoices

Selections HTML Email Editor Attachments

Format: Adobe PDF

Column Headers: ☐

Report File Name: INInvoice.pfd

Customer - From:

Customer - To:

Date - From:

Date - To:

Number - From:

Number - To:

Type:

- ☒ Invoice
- ☒ Credit
- ☐ Quote
- ☐ Standing Invoice

Post Status:

- ☒ Unposted
- ☒ Posted

Up to Period: Sep 2015

Branch: HO

Attach Links: ☐

Use SMTP mailing: ☐

Log SMTP Session: ☐

Request Read Receipt: ☐

Consolidate Emails: ☒

Consolidate Attachments: ☐

The invoices will use the email addresses set up in the Contacts – Email Documents information for invoices

File Edit View Shortcut Script Window Help

Navigator

Maintain Tasks Reports Setup

- Accounts Receivable
 - Customers
 - Customer List
 - Customer Groups
 - Contacts
 - Contacts List
 - Sales Areas
 - Sales Areas Grid
 - Sales Groups
 - Sales Groups Grid
 - Sales Persons
 - Sales Persons Grid
 - Buying Group (Categories 1)
 - Categories 2
 - Memo List
 - Link List
 - Budgets
- Inventory Control
- Invoicing System
 - Invoice List
 - Shippers
 - Promotion (Categories 1)

AR Customer Maintenance - ASHENG - Asheng Engineering Ltd

Select Customer: ASHENG Asheng Engineering Ltd NZD

Customer Contacts Banking/Delivery Links Memos Balances Graph Documents Transactions

Full Name	Role	Phone No	Fax No
Donna	Accounts	546 7908	546 7908

Email Documents

Statements	info@asheng.co.nz	<input type="checkbox"/>
Invoices	info@asheng.co.nz	<input type="checkbox"/>
Quotes	info@asheng.co.nz	<input type="checkbox"/>
Packing Slips	info@asheng.co.nz	<input type="checkbox"/>

Bill From Customers

Save Cancel

Created by Accredo on 11/09/2015 1:34:24 p.m. Modified by Accredo on 11/09/2015 2:02:47 p.m.

For more information on email set up - see Email Integration Notes

Contact

For further information or for assistance with Accredo please do get in touch with us.

Offices

New Zealand (+64)

Tauranga..... 07 544 4488

Wellington..... 04 282 1534

Email..... Helpdesk@ZealSystems.co.nz

Australia (+61)

Melbourne..... 03 9016 3410

Sydney..... 02 9098 0996

Brisbane..... 07 3088 4989

Email..... Helpdesk@ZealSystems.com.au