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

Accredo
taking care of business

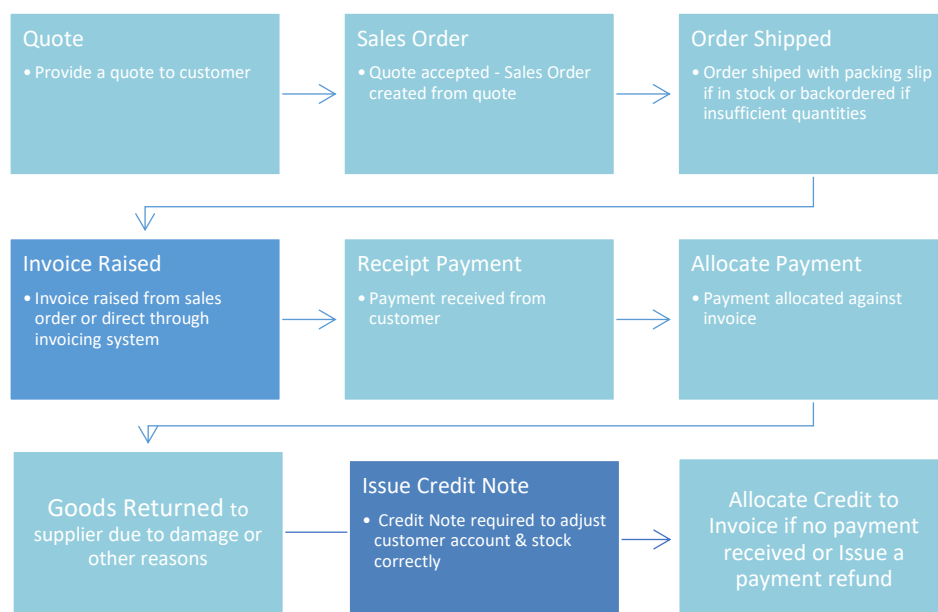In this lesson you will learn about using the Accredo system.

After completing this lesson you will be able to:

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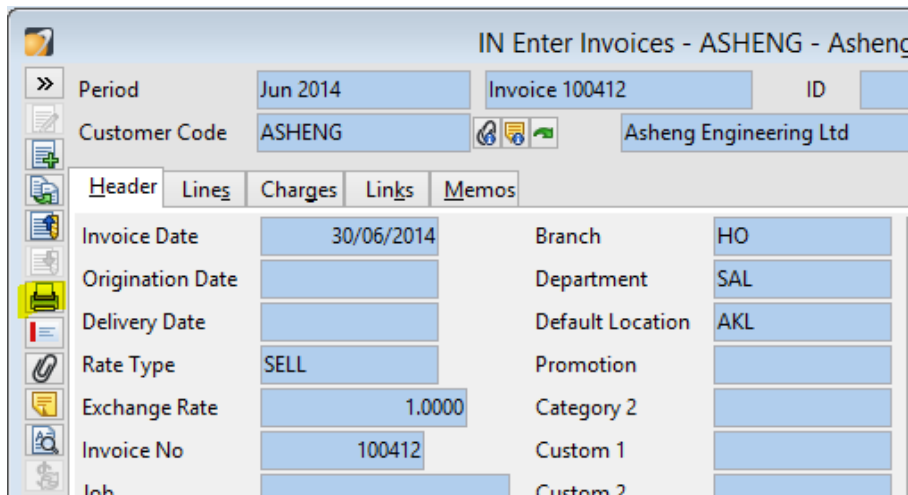- Email an Invoice or Credit Note

Contents

Process flow

Quote	Sales Order	Order Shipped
• Provide a quote to customer	• Quote accepted - Sales Order created from quote	• Order shiped with packing slip if in stock or backordered if insufficient quantities

Invoice Raised	Receipt Payment	Allocate Payment
• Invoice raised from sales order or direct through invoicing system	• Payment received from customer	• Payment allocated against invoice

Goods Returned to supplier due to damage or other reasons	Issue Credit Note	Allocate Credit to Invoice if no payment received or Issue a payment refund
	• Credit Note required to adjust customer account & stock correctly	

Printing Invoices and Credit Notes
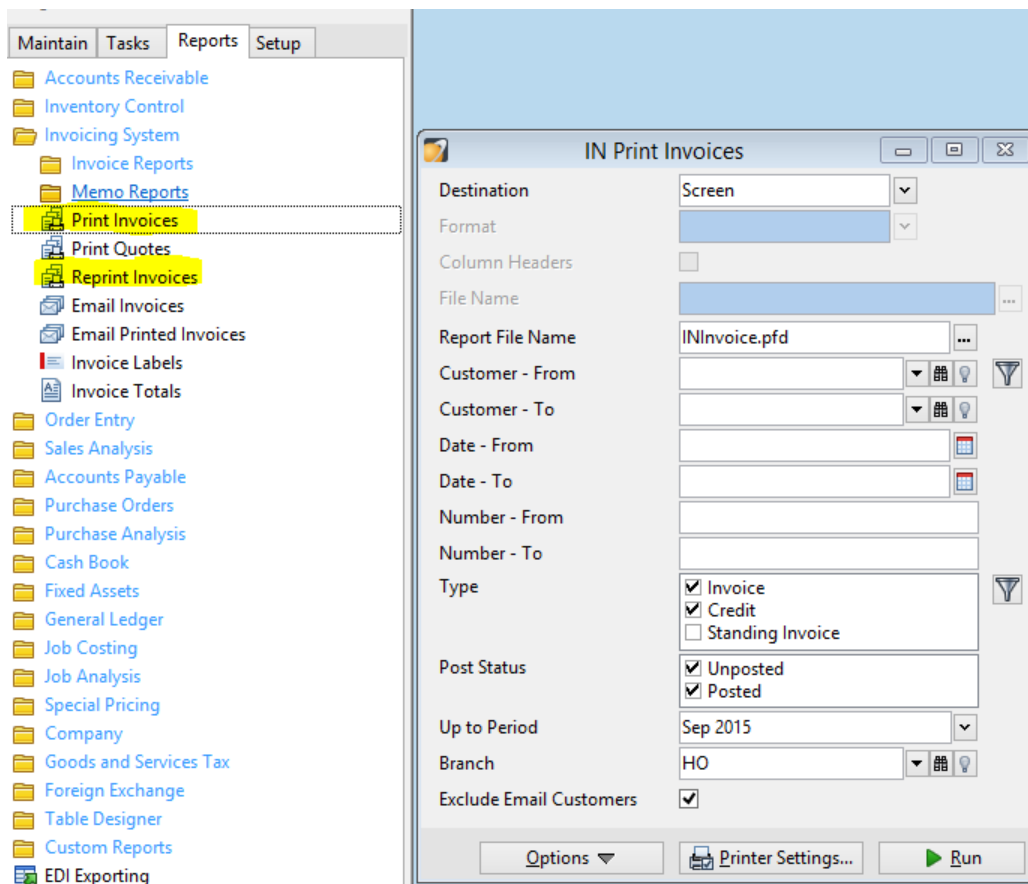
To Print an individual invoice click on the print button 🖨 (Ctrl + P)

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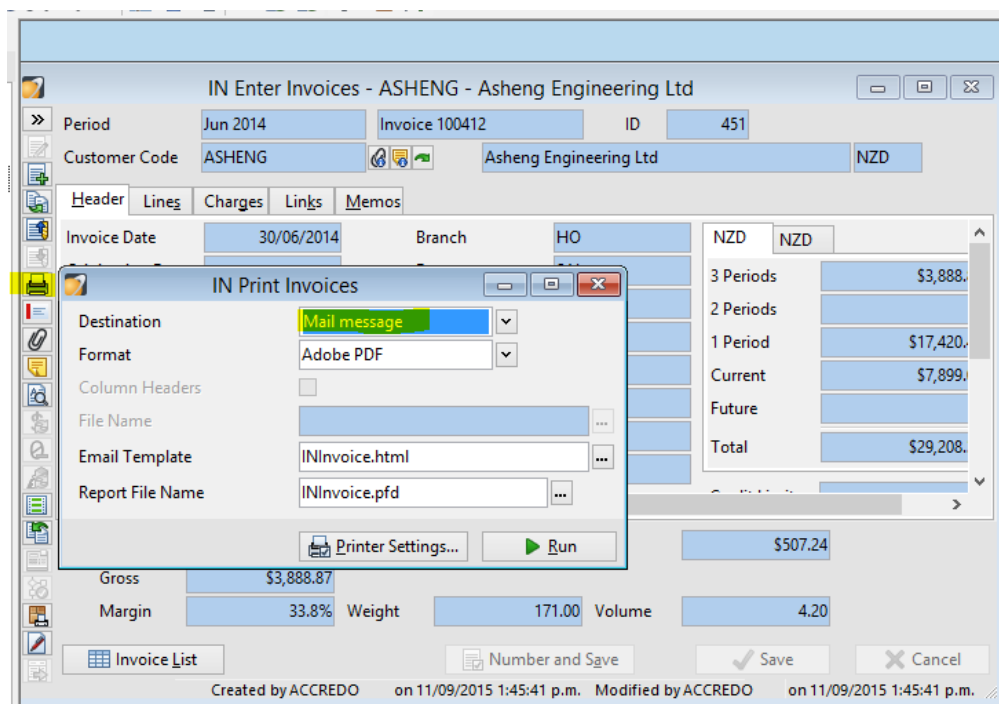
Note: If an Invoice has previously been printed to screen the system considers it to be printed. Use print preview if you are not actually printing.

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.

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

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