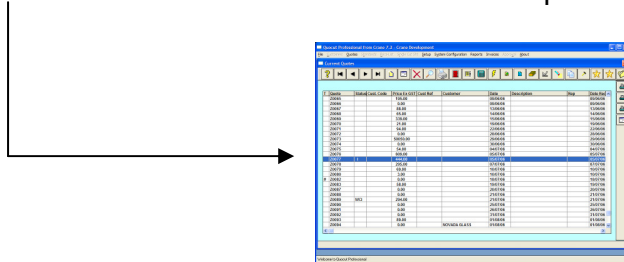


## INVOICES

Quocut Professional has the ability to produce an Invoice and/or a Delivery Docket from a quotation. When an Invoice/Delivery Docket has been generated the quotation screen will display an 'I' in the status column for the relevant quotation.



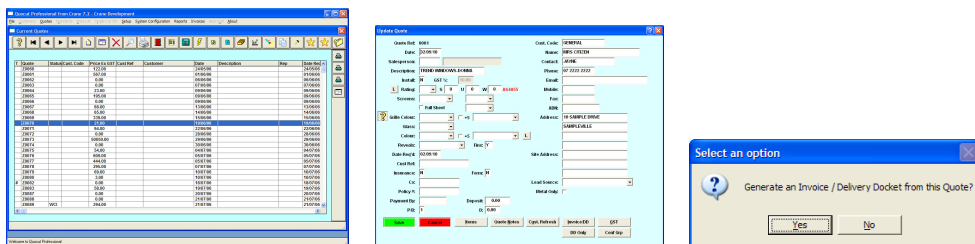
**NOTE:** The status column will show a 'W' for won, 'C' for completed and 'I' for Invoice and 'D' for Delivery Docket and 'O' for order raised.

The user can generate an invoice and delivery docket at the one time or select delivery docket only – **see Fact Sheet for Delivery Dockets**. The process will apply to either option. However when a delivery docket is generated the invoice cannot be printed until such time as an invoice has been generated.

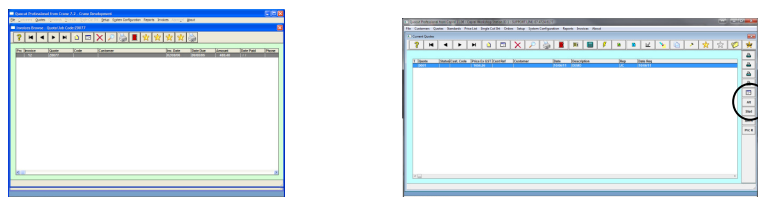
### 1. GENERATING AN INVOICE (&/OR DELIVERY DOCKET)

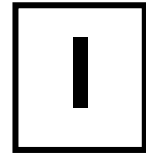
To generate an invoice and/or delivery docket proceed as follows:

- Highlight the relevant quotation
- Select View/Update to display the quotation screen and select Invoice/DD



- A prompt will appear to generate an Invoice/Delivery Docket
- To proceed, select <Yes> - The program will automatically select the invoicing browse and display the invoice for the selected quote. See Invoice Options below to modify and print an Invoice.





## INVOICES

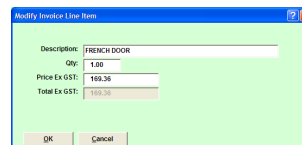
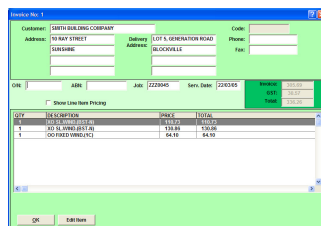
### NOTE:

- The browse will only display invoice details relevant to the quotation selected to produce an Invoice/DD. To view all invoices – select the Invoice menu. See information detailed below for further options in relation to invoices.
- To view an invoice already generated from the quotation screen, select the view icon on the right hand side of the quotation screen.

## 2. INVOICE OPTIONS

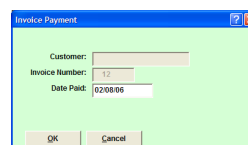
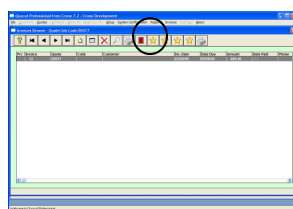
### 2.1 Modifying description details on invoices

- Highlight the relevant invoice
- Select View/Update - to modify an item – select Edit Item and modify as required. Select OK, then select OK on the Invoice Screen
- To print an invoice select the printer icon (next to the red door)



### 2.2 Record payment details for an invoice

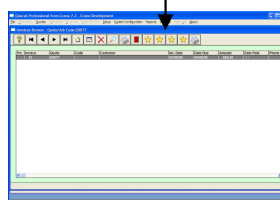
- Highlight the relevant invoice
- Select the pay invoice icon

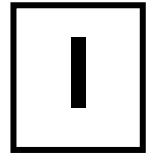


- Complete the date paid field
- Select OK

### 3.3 Print a list of outstanding invoices

- Select the outstanding invoice icon to generate a report of outstanding invoices

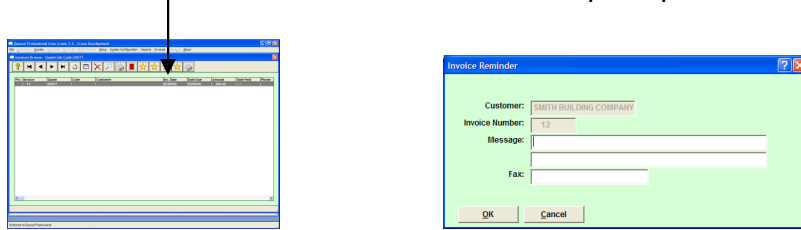




## INVOICES

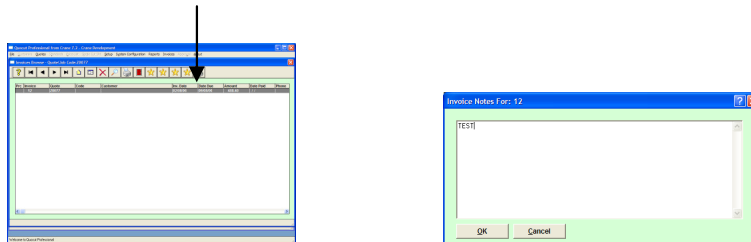
### 2.4 Print a reminder invoice

- Select the invoice reminder icon and add a reminder message, which will be printed on the invoice reminder. The reminder message will be added to invoice notes if validated at the prompt.



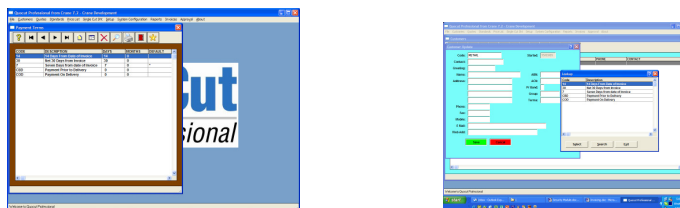
### 2.5 Add or view invoice notes

- Select the invoice notes icon to add or view notes.



### 2.6 Payment terms

- Select the invoice menu and then select payment terms
- Add or delete terms as appropriate
- Select a default as appropriate



**NOTE:** Payment terms can be nominated in the customer set up screen. The look up box will be activated if the user enters at the terms field.

### 2.7 Bank details

- Select the invoice menu and then select bank details
- Complete the fields as appropriate – these details will appear on the invoice to allow invoices to be paid by direct deposit and select OK

