How to create a Sales Invoice
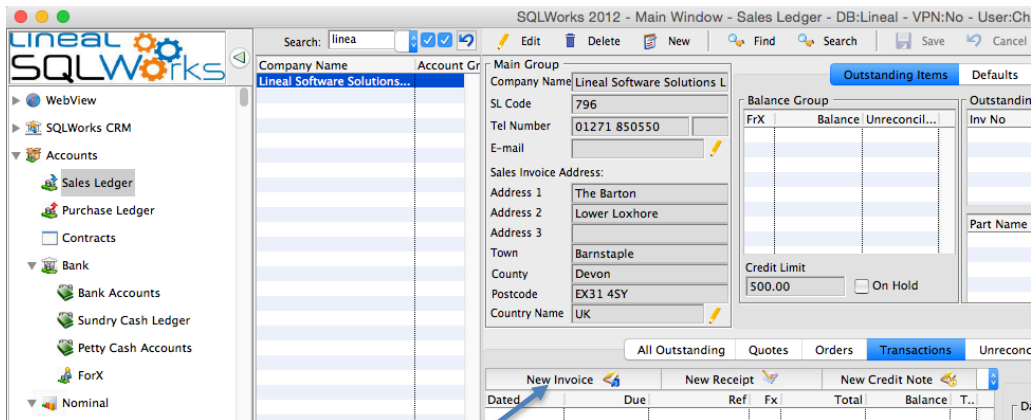
Procedure

1. To create an invoice, go to the "Sales Ledger" on the side navigation bar under the heading "Accounts" and select the Company's on the list.

2. Click on the "Transactions" tab.

3. Click on "New Invoice".

4. If the item is coming out of stock, start typing in the product code in the "Prd Code" box and select the product from the drop down list. This will also fill in the product description box. If the product is not in the stock ledger, just type the product and description in the white "Description" box.
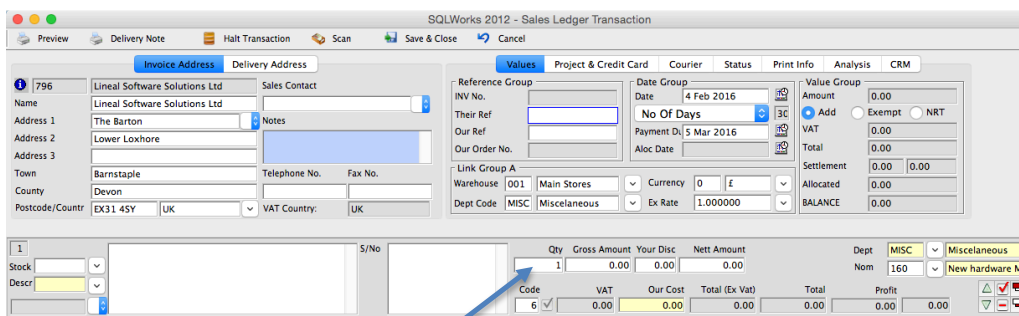
5. Type the quantity in the "Qty" box, the sale price in the "Gross Amount" box and the amount you paid in the "Our Cost" box.

6. Select which category the product is by clicking on the box next to "Nom" and click on the most appropriate category. E.g. "New Hardware Mac" or PC.

7. Click "Save & Close" to save the Invoice.

8. An invoice can also be created using right click. Right click in the Transactions area for options including "New Invoice". Right click a Quote or an Order for the option to "Send Quote (or Order) to Invoice".