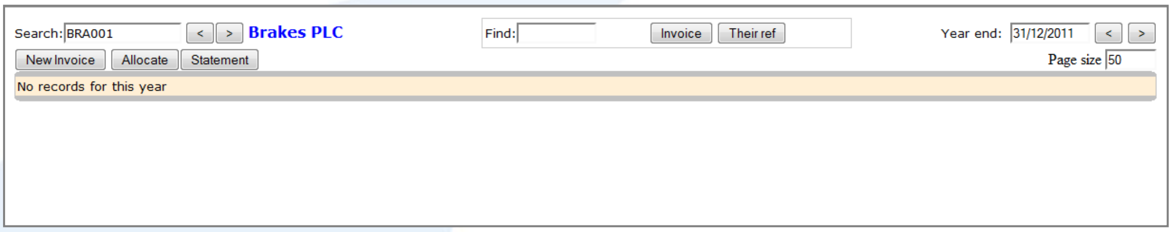
Using Items in Sales Invoices

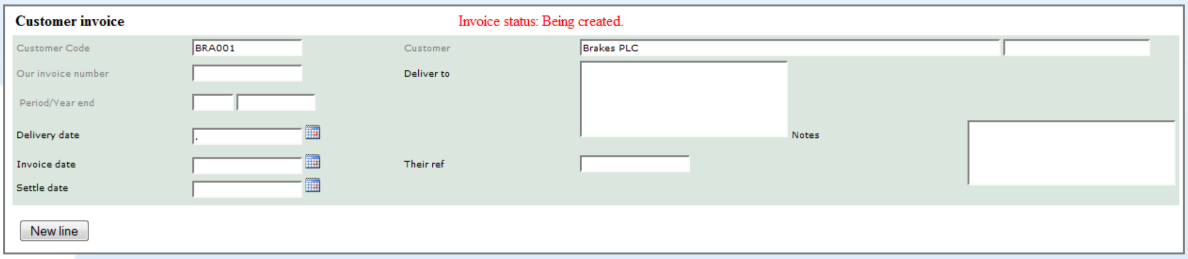
Using Items makes entering invoices much quicker and less prone to inputting error. To use them, you must set up an items list in the Items tab. For more information on how to do this, see the Add an Item help document. Items can only used with sales invoices.

To create a new sales invoice, press the Sales tab and then the Invoicing button.

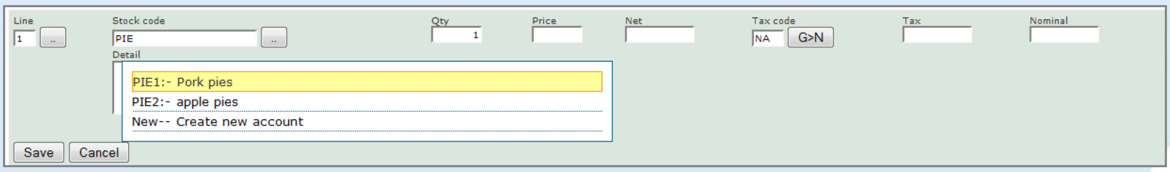
Press the New invoice button.



Enter the header details. Putting a full stop [.] in the Delivery date will enter today's date, and automatically fill in the Invoice date and Settle date fields. All the other fields are optional. Press the New line button.



Begin typing the Stock code in. The matching codes will appear below in the drop down menu. Select the one you wish to use.



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The rest of the line will automatically be filled in. Press the Save button to complete the line.