

# Getting started with Incred – Instant Invoicing

**Step one** – When you install Incred you **MUST** enter your company details – Make sure that these are correct as they will be used on all printed stationary.

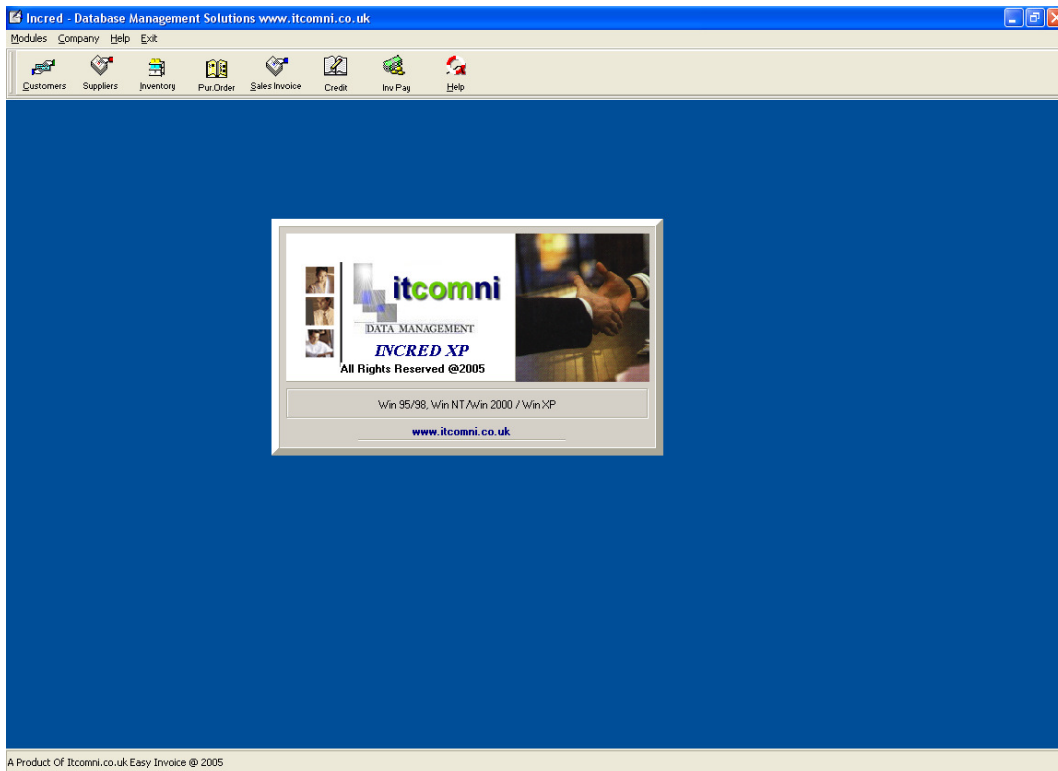
**Company**

**Company Registration Form**

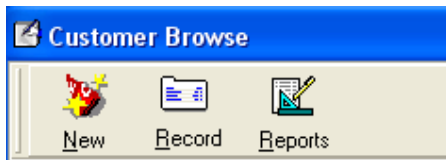
Your Company Name	<input type="text" value="Your Company"/>	<b>It is important that you enter your Company details. correctly Details entered in this form appear on all reports including Invoices, Credit notes and Purchase orders.</b>
Address	<input type="text" value="Address Line 1"/>	
	<input type="text" value="Address Line 2"/>	
Town/State	<input type="text" value="Your Town or State"/>	
Post/Zip Code	<input type="text" value="Your Zip"/>	
Telephone	<input type="text" value="12345678901234"/>	
Fax Number	<input type="text" value="23456789012345"/>	
Tax/Vat Registration	<input type="text" value="123 123 1234"/>	
Email Address	<input type="text" value="youremail@hotmail.com"/>	
<input type="button" value="Save and Close"/>		

Edit Company

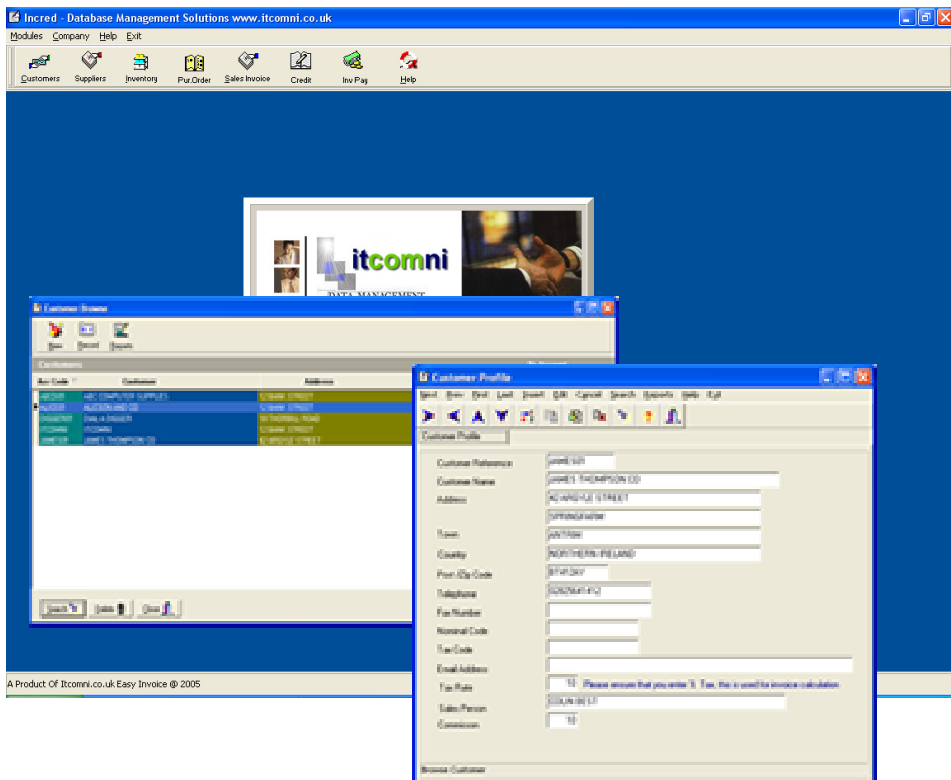
Module available – Customers – Suppliers – Inventory – Purchase Orders – Sales Invoices – Credit Notes – Invoice Payments (Buttons at top of screen)



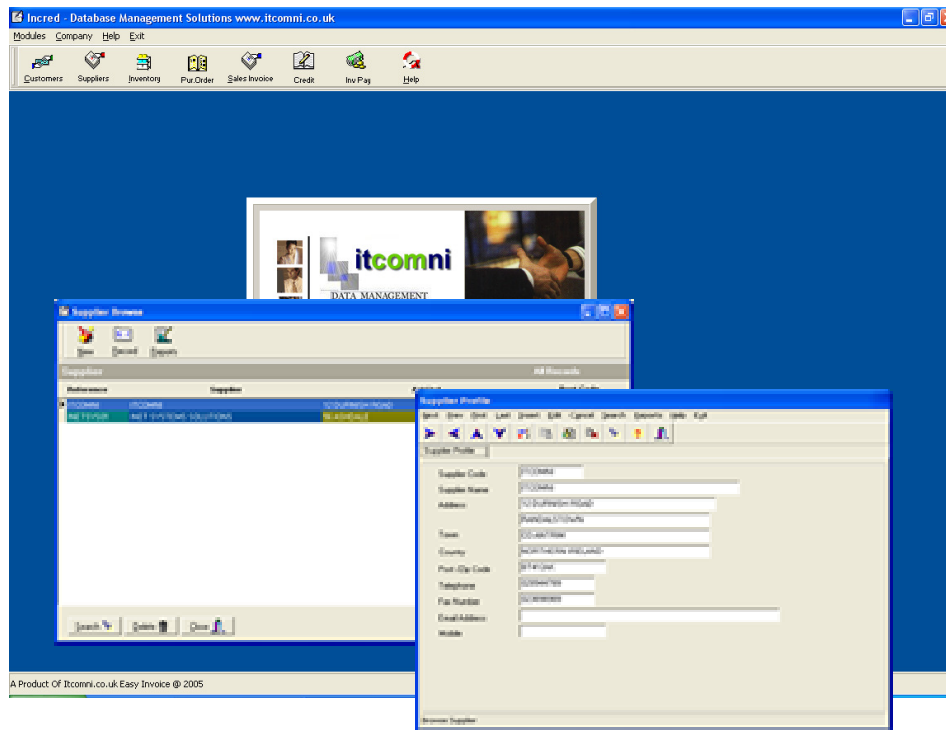
When you enter a module, the following option buttons are available. New (Add new record) – Record (Edit the currently highlighted record) – Reports (Left click will produce standard report, Right click will give you a number of report options if applicable to that Module).



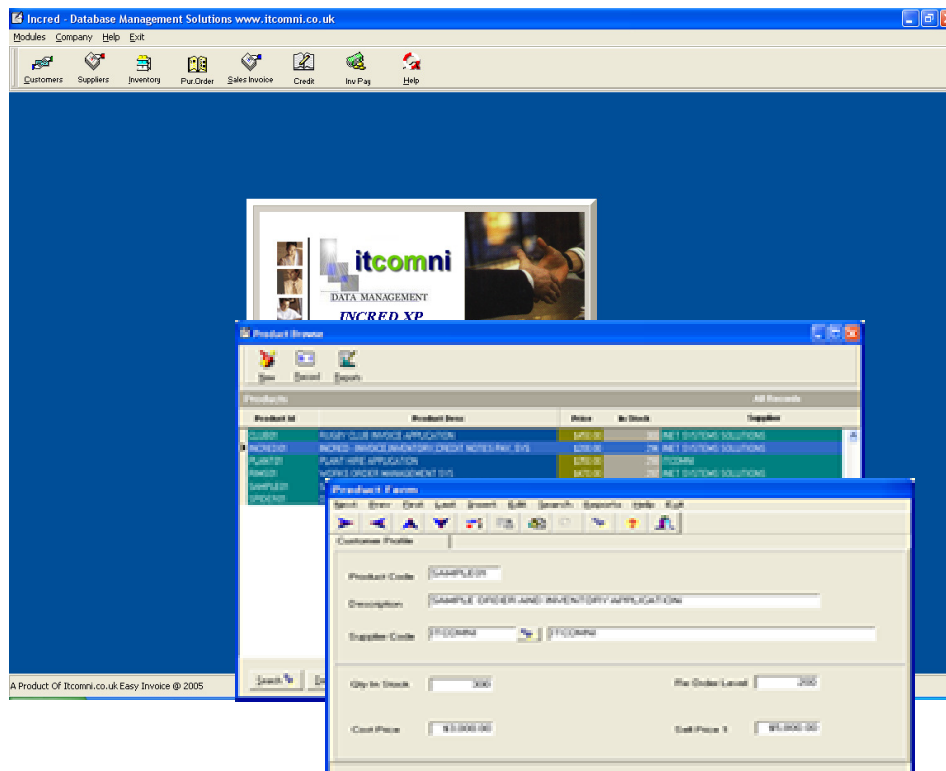
**Step two** – Create your Customer Profiles (These can also be created on the fly when creating an Invoice)



### Step three – Optional - Create your Supplier Profiles



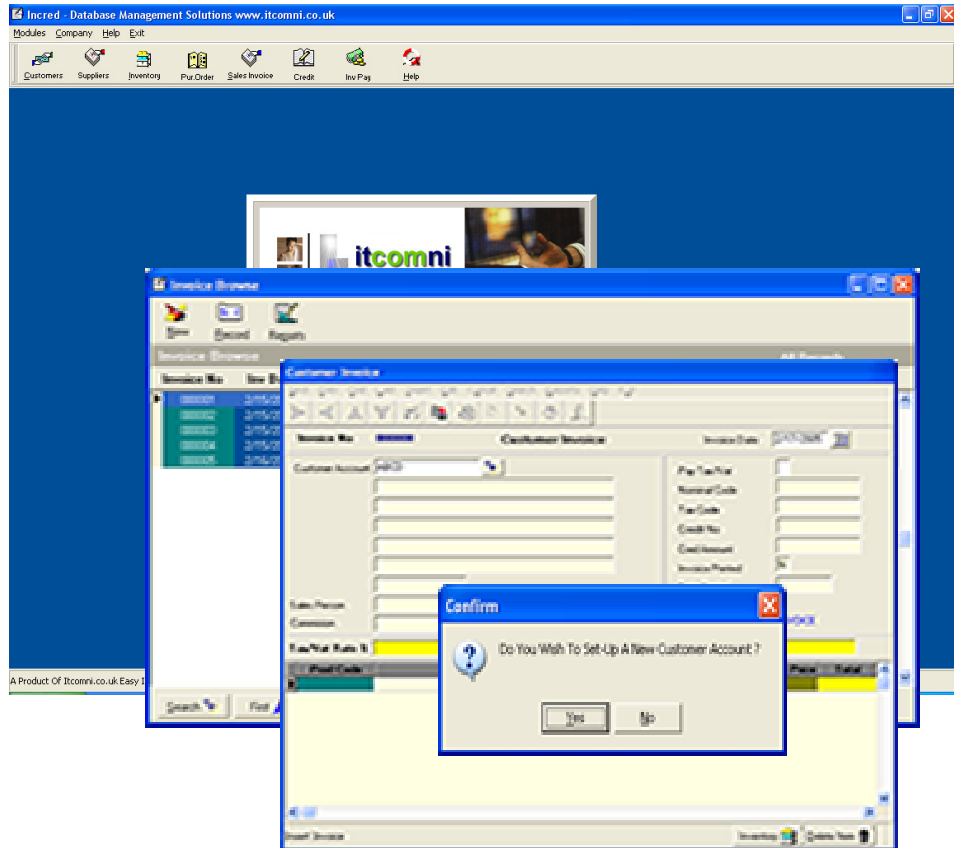
### Step four – Optional - Create your inventory profiles including current stock levels



## Step five - Create your Invoices.

Note: You can select an existing customer or create one on the fly. If you enter a customer code that Incred does not know you will be prompted to create a new one.

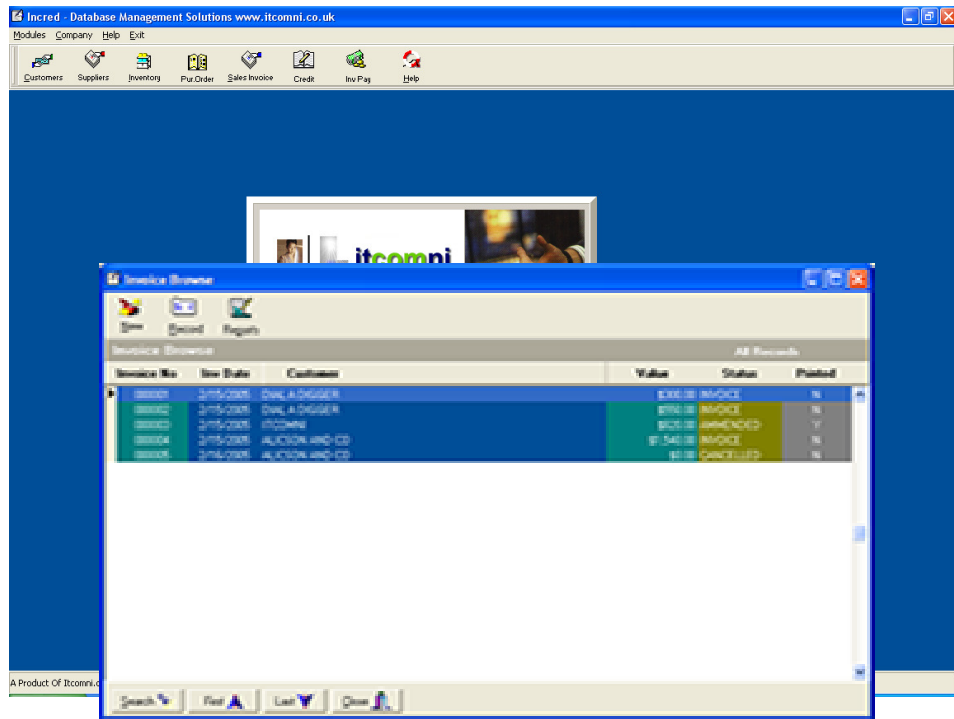
Note: If this is a Cash Sale invoice, Type **CASHSALE** into the Customer Account and you will only have to input minimal details.



New customer can be created during Invoice Creation

The screenshot shows the 'New Customer Account' form. The form has the following fields: 'Customer Reference' (JMC001), 'Customer Name' (JMC COMPUTER SUPPLIES), 'Address' (11 BARR STREET), 'Town' (JMC TOWN), 'County' (JMC COUNTY), 'Telephone' (JMC TELEPHONE), 'Fax Number' (JMC FAX NUMBER), 'National Code' (JMC), 'Fax Code' (JMC), 'Email Address' (jmc@jmc.co.uk), 'Tax Rate' (10), 'Sales Person' (JAMES YOUNG), and 'Commission' (10). The 'Save and Close' button is at the bottom right. The form is titled 'New Customer Account' and has a 'Insert Customer' button at the bottom left.

You can use inventory product codes if you have set these up or enter free text into the Invoice Lines screen



**Customer Invoice**

Next Prev First Last Insert Edit Cancel Search Reports Help Exit

Invoice No: 000010 Customer Invoice Invoice Date: 21/02/2005

Customer Account: CUST01 For Cash Customer Type "CASHSALE"

Name: CUSTOMER 01

Address: ADDRESS 01

Address 02:

Town/State: MY TOWN

Country: MY STATE

Post/Zip Code: CA 60030

Sales Person: BARNEY

Commission: 10

Pay Tax/Vat: Y

Nominal Code: 6000

Tax Code: 0

Credit No:

Cred Amount:

Invoice Printed: N

Date Printed:

Status: INVOICE

Tax/Vat Rate %: 8.625 Net Total: £0.00 Tax/Vat: 0 Total: £0.00

Prod Code	Description	Quantity	Unit Price	Total
WIDGET01	STANDARD WIDGET	0.00	£15.00	£0.00

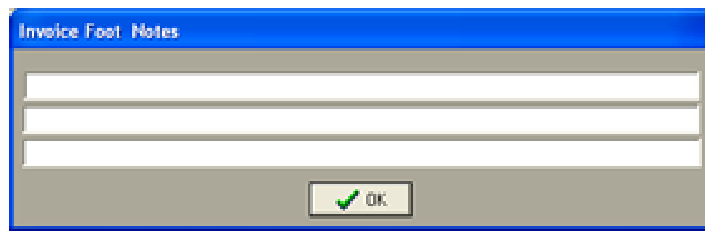
Browse Invoice Inventory Clone Delete Item

Browse Invoice

Inventory Clone Delete Item

You can also clone an existing Invoice – Using the clone button  
 You can check current stock levels for any product by click on the inventory button

You can add notes to you Invoice by selecting Edit – Add Notes from the Text Menu.



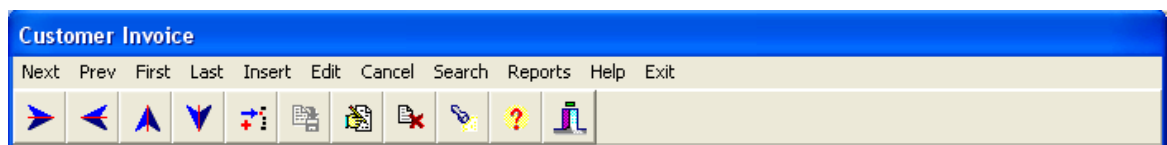
### Text Menu

This is placed just above the button menu and can be used for the above selection and additional Reporting Options.

### Button Menu

All modules use the same navigation button structure (next record – previous record etc.) and when you hover your mouse over each button its description will be displayed.

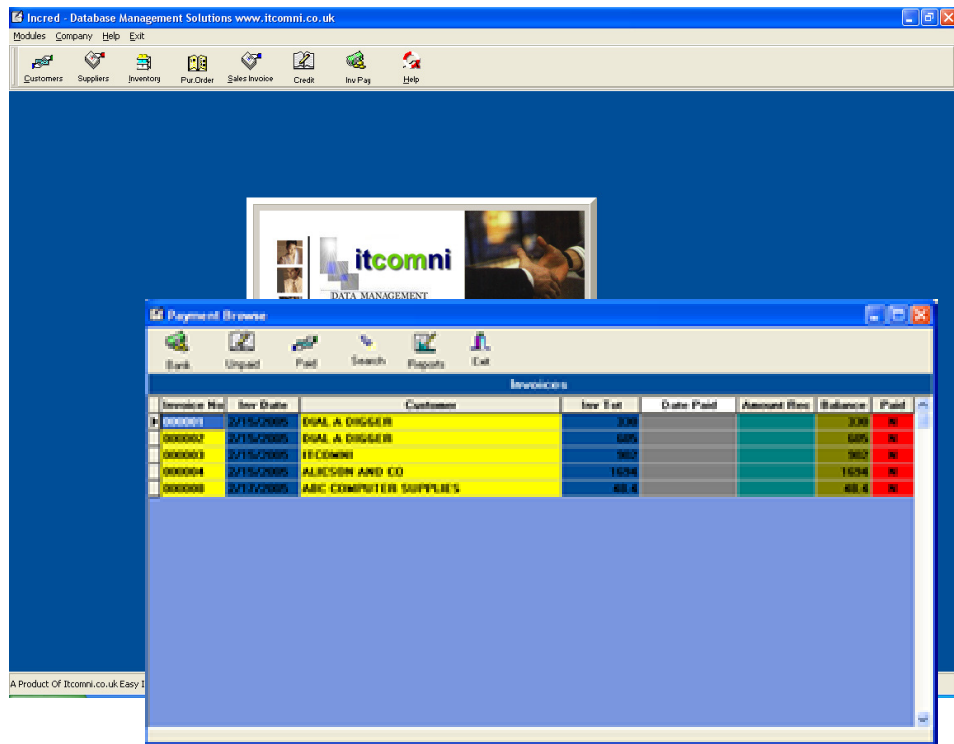
Next - Prev –First – Last - Insert New – Save – Edit - Cancel Edit – Search – Help - Close/Exit



Preview Invoice before printing (From the Text menu option Reports – Print Preview.



## Step six – Invoice Payments – You can Part or Fully pay invoices



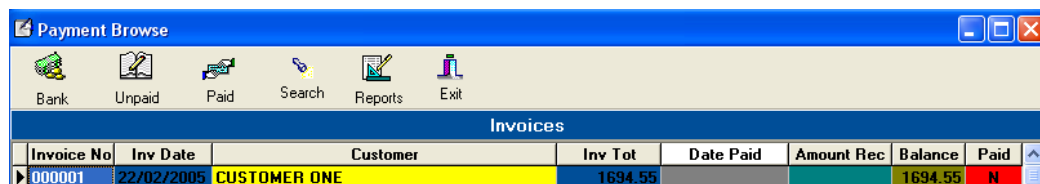
You can view unpaid or paid invoice by selecting a button.

You can enter part payment amount.

You can mark the invoice as fully paid by using the Bank button.

You can Search for an invoice by using the Quick Search button.

You can run reports for paid and unpaid invoices by Right Clicking the Reports button and selecting the relevant report.



## Step seven – Reports

### Running daily/weekly invoice reports

1. Select reports from the invoice text menu
2. Select Invoice Report from Drop Down Menu
3. Enter From and To date range
4. Run Preview or Print your reports.

The screenshot shows the 'Invoice' form in a software application. The 'Invoice No' is 000001. The 'Customer Account' is CUST01. The 'Name' is CUSTOMER ONE. The 'Address' is ADDRESS LINE 1 and ADDRESS LINE 2. The 'Town/Sate' is CUSTOMER TOWN. The 'Country' is CUSTOMER COUNTRY. The 'Post/Zip Code' is ZIP CODE. The 'Sales Person' is JH HALL. The 'Commission' is 10. The 'Invoice Date' is 22/02/2005. The 'Tax/Vat' is Y. The 'Initial Code' is 6000. The 'Code' is 0. The 'Credit No' is blank. The 'Cred Amount' is blank. The 'Invoice Printed' is N. The 'Date Printed' is blank. The 'Status' is AMENDED. The 'Tax/Vat Rate %' is 8.625. The 'Net Total' is £1,560.00. The 'Tax/Vat' is 134.55. The 'Total' is £1,694.55. The 'Invoice Report' menu is open, showing options: Preview Invoice, Print Invoice, InvReport By Customer, Invoice Report, Product Sales Report, and None Product Sales Report. The 'Invoice Report' option is selected. Below the form, there is a table with columns: Prod Code, Description, Quantity, Unit Price, and Total. The table contains three rows: 'You can anything into this line', 'if you do not require product codes', and 'WIDGET01 STANDARD WIDGET'. A 'Search' dialog box is open, showing the search criteria: 'Show all data where the Invoice date is on or after 01/01/2005 and the Invoice date is on or before 01/01/2005'. The 'OK' button is highlighted.

Prod Code	Description	Quantity	Unit Price	Total
	You can anything into this line			
	if you do not require product codes	1.00	£60.00	£60.00
WIDGET01	STANDARD WIDGET	100.00	£15.00	£1,500.00

The screenshot shows the 'Print Preview' window. The window title is 'Print Preview'. The window contains a list of invoices. The list has columns: Invoice No, Invoice Date, Invoice, Customer, Description, Quantity, Unit Price, Total, and Invoice Date. The list contains 10 rows of data. The first row is: 000001, 22/02/2005, JH HALL, CUSTOMER ONE, ADDRESS LINE 1, ADDRESS LINE 2, CUSTOMER TOWN, CUSTOMER COUNTRY, ZIP CODE, JH HALL, 10, £1,694.55, 22/02/2005. The last row is: 000010, 22/02/2005, JH HALL, CUSTOMER ONE, ADDRESS LINE 1, ADDRESS LINE 2, CUSTOMER TOWN, CUSTOMER COUNTRY, ZIP CODE, JH HALL, 10, £1,694.55, 22/02/2005. The window also has a 'Close' button and a 'Page 1 of 1' indicator.

Invoice No	Invoice Date	Invoice	Customer	Description	Quantity	Unit Price	Total	Invoice Date
000001	22/02/2005	JH HALL	CUSTOMER ONE	ADDRESS LINE 1	ADDRESS LINE 2	CUSTOMER TOWN	CUSTOMER COUNTRY	ZIP CODE
000002	22/02/2005	JH HALL	CUSTOMER ONE	ADDRESS LINE 1	ADDRESS LINE 2	CUSTOMER TOWN	CUSTOMER COUNTRY	ZIP CODE
000003	22/02/2005	JH HALL	CUSTOMER ONE	ADDRESS LINE 1	ADDRESS LINE 2	CUSTOMER TOWN	CUSTOMER COUNTRY	ZIP CODE
000004	22/02/2005	JH HALL	CUSTOMER ONE	ADDRESS LINE 1	ADDRESS LINE 2	CUSTOMER TOWN	CUSTOMER COUNTRY	ZIP CODE
000005	22/02/2005	JH HALL	CUSTOMER ONE	ADDRESS LINE 1	ADDRESS LINE 2	CUSTOMER TOWN	CUSTOMER COUNTRY	ZIP CODE
000006	22/02/2005	JH HALL	CUSTOMER ONE	ADDRESS LINE 1	ADDRESS LINE 2	CUSTOMER TOWN	CUSTOMER COUNTRY	ZIP CODE
000007	22/02/2005	JH HALL	CUSTOMER ONE	ADDRESS LINE 1	ADDRESS LINE 2	CUSTOMER TOWN	CUSTOMER COUNTRY	ZIP CODE
000008	22/02/2005	JH HALL	CUSTOMER ONE	ADDRESS LINE 1	ADDRESS LINE 2	CUSTOMER TOWN	CUSTOMER COUNTRY	ZIP CODE
000009	22/02/2005	JH HALL	CUSTOMER ONE	ADDRESS LINE 1	ADDRESS LINE 2	CUSTOMER TOWN	CUSTOMER COUNTRY	ZIP CODE
000010	22/02/2005	JH HALL	CUSTOMER ONE	ADDRESS LINE 1	ADDRESS LINE 2	CUSTOMER TOWN	CUSTOMER COUNTRY	ZIP CODE