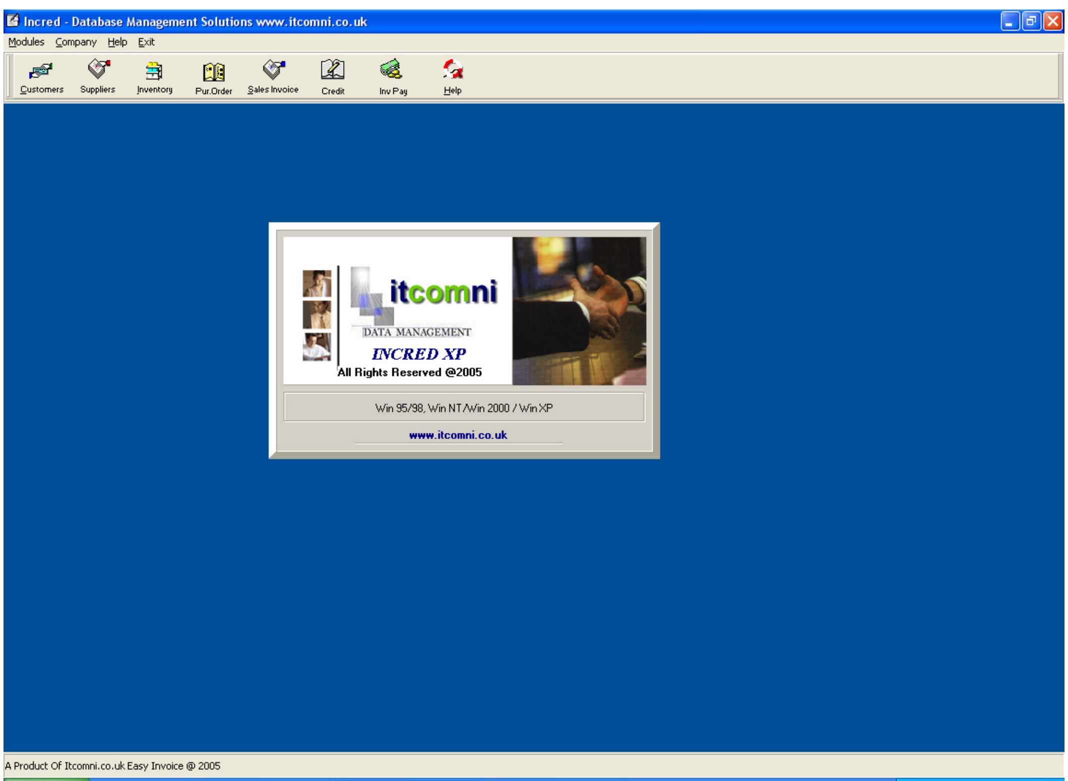
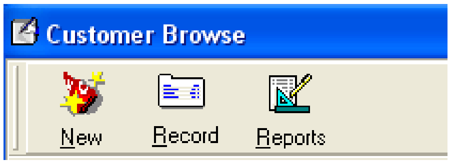
Getting started with Incred – Instant Invoicing

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.

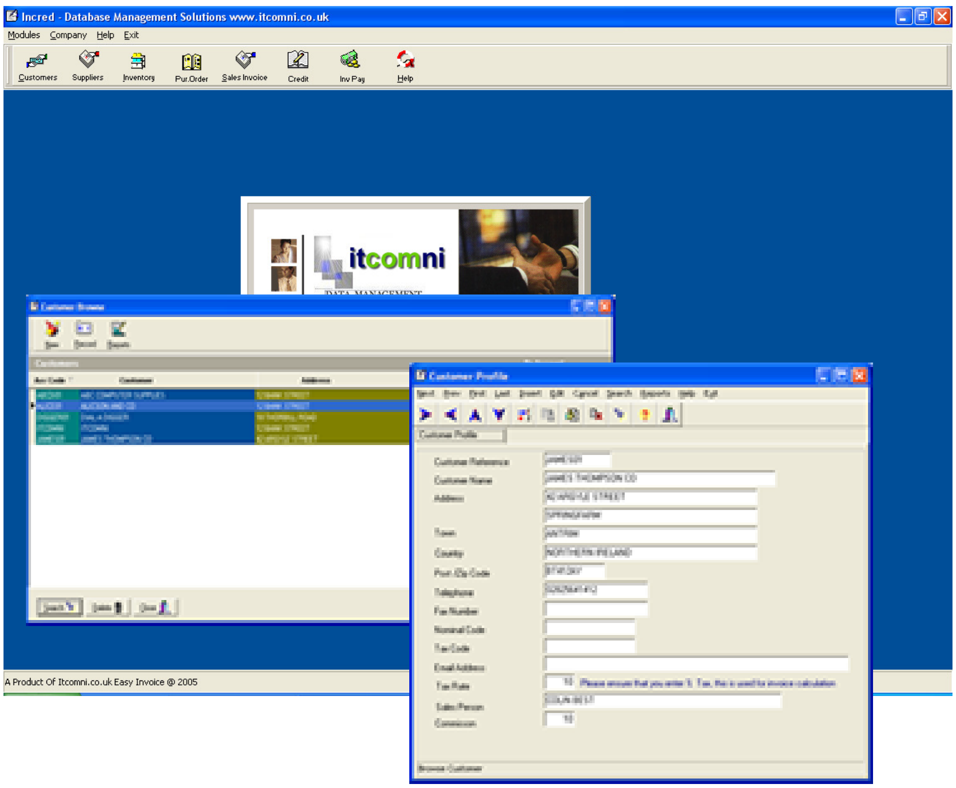
Module available – Customers – Suppliers – Inventory – Purchase Orders – Sales Invoices – Credit Notes – Invoice Payments (Buttons at top of screen)



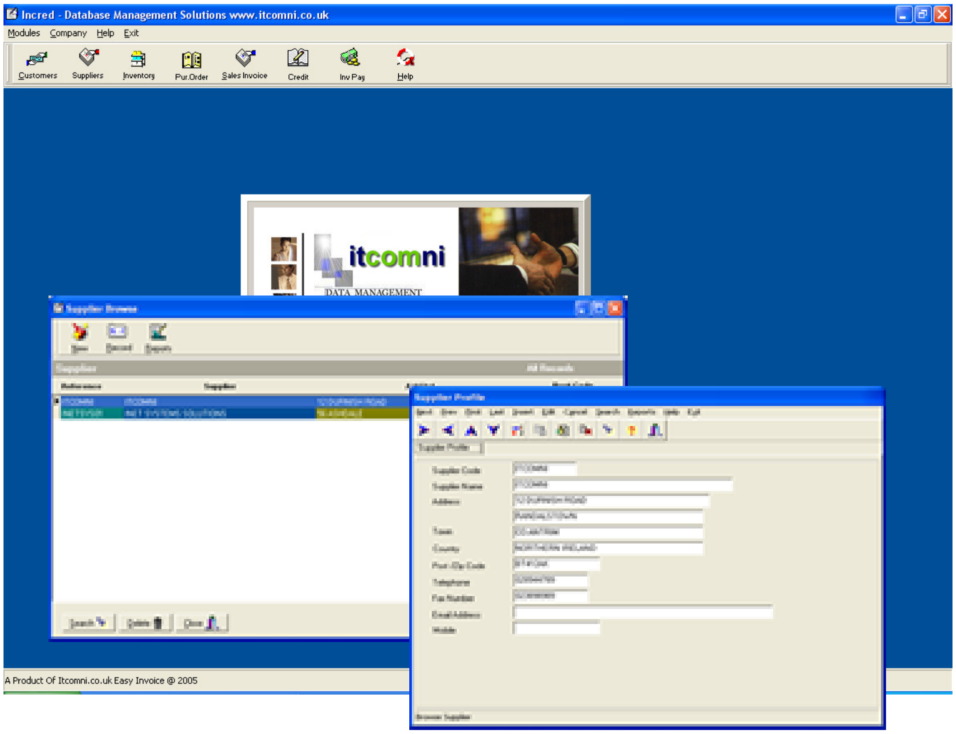
When you enter a module, the following option buttons are available. New (Add new record) – Record (Edit the currently highlighted record) – Reports (Left click will produce standard report, Right click will give you a number of report options if applicable to that Module.



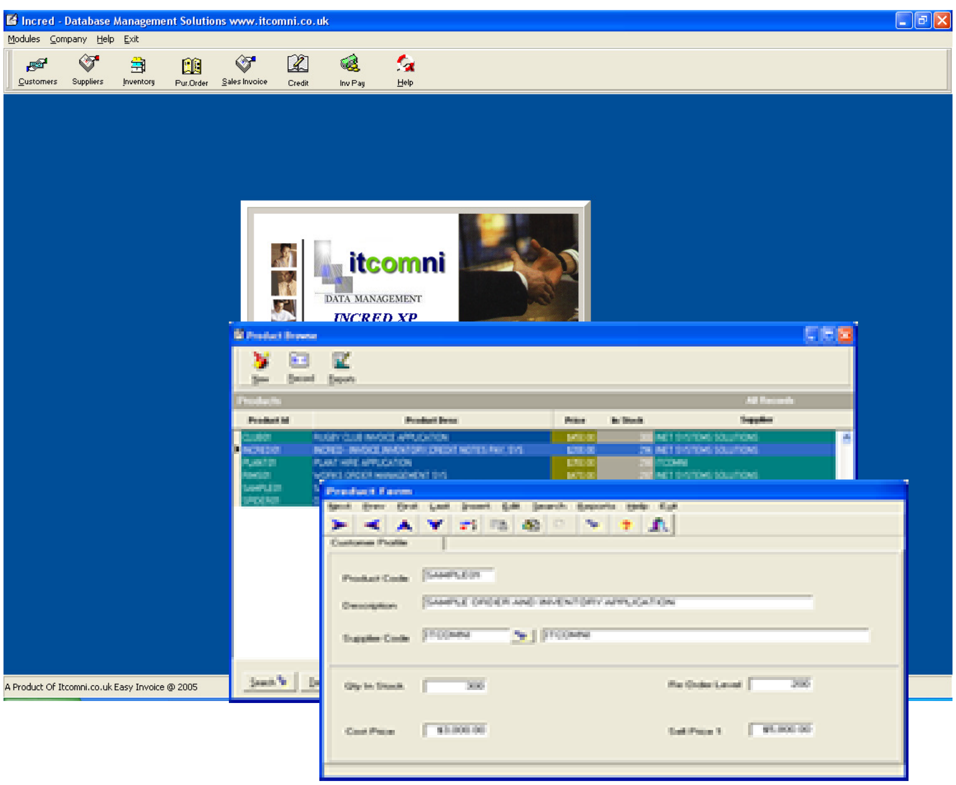
Step two – Create your Customer Profiles (These can also be created on the fly when creating an Invoice)



Step three – Optional - Create your Supplier Profiles



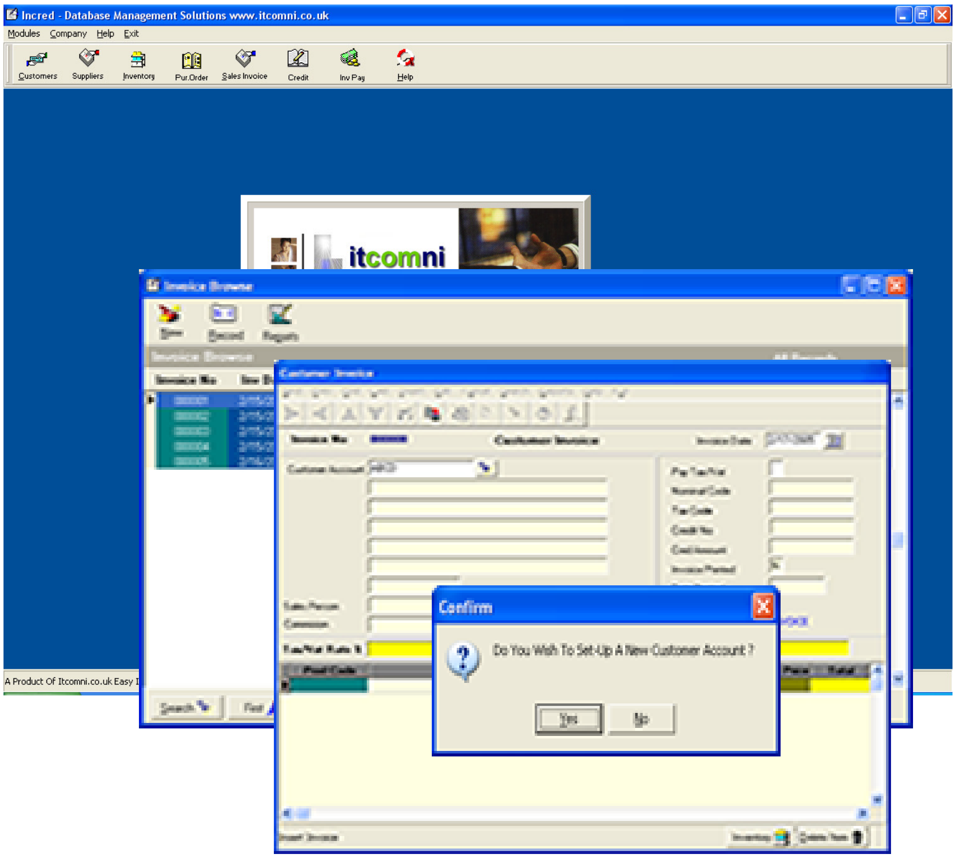
Step four – Optional - Create your inventory profiles including current stock levels



Step five - Create your Invoices.

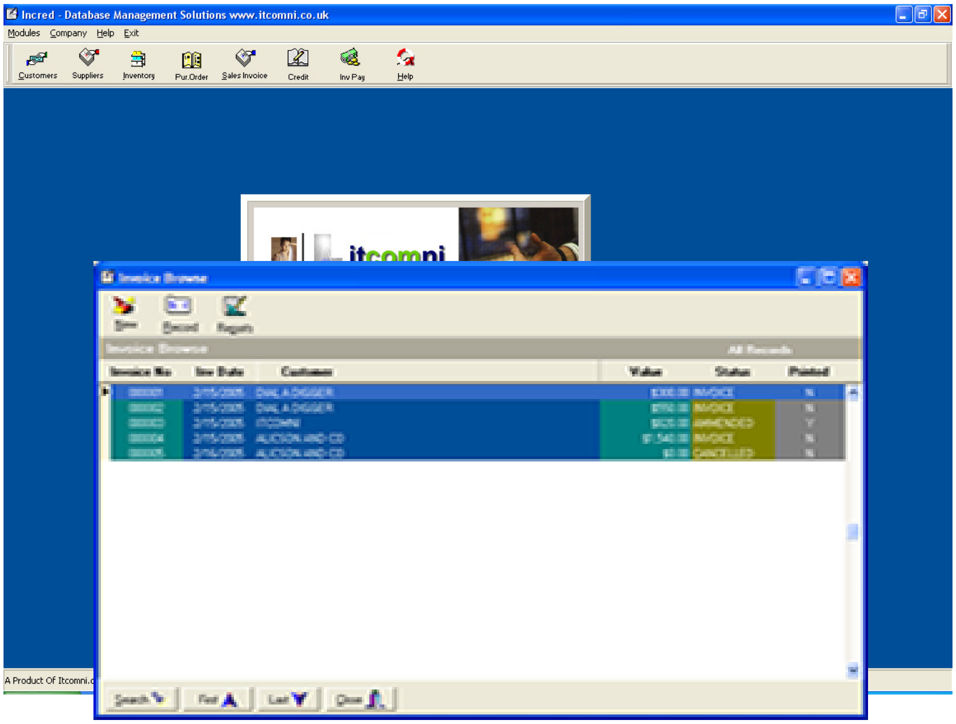
Note: You can select an existing customer or create one on the fly. If you enter a customer code that Incred does not know you will be prompted to create a new one.

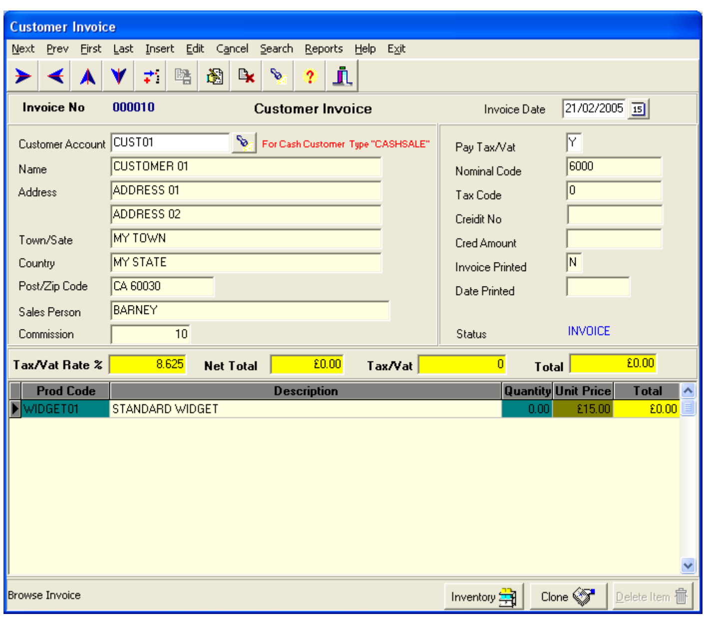
Note: If this is a Cash Sale invoice, Type **CASHSALE** into the Customer Account and you will only have to input minimal details.

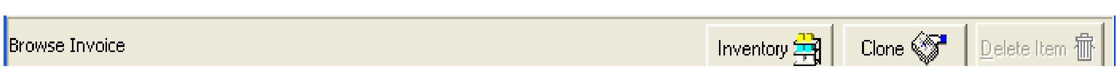


New customer can be created during Invoice Creation

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

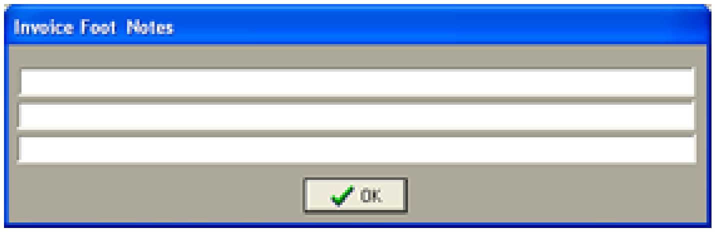






You can also clone an existing Invoice – Using the clone button
You can check current stock levels for any product by click on the inventory button

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



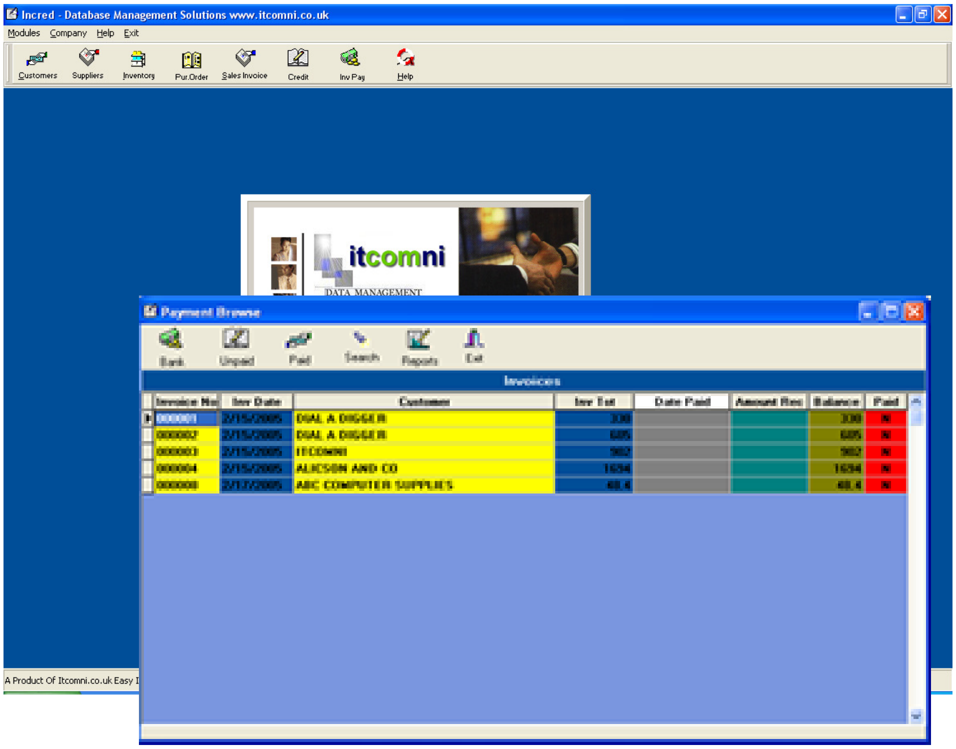
Text Menu
This is placed just above the button menu and can be used for the above selection and additional Reporting Options.

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.

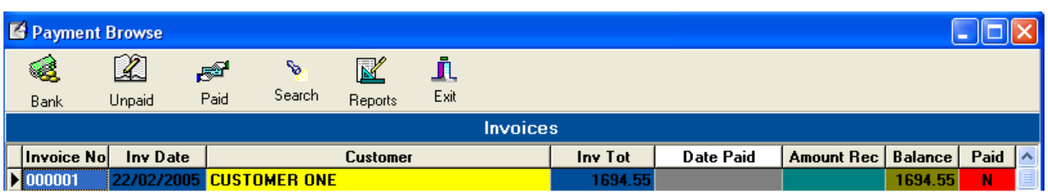
Next - Prev –First – Last - Insert New – Save – Edit - Cancel Edit – Search – Help - Close/Exit

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.