

# 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**

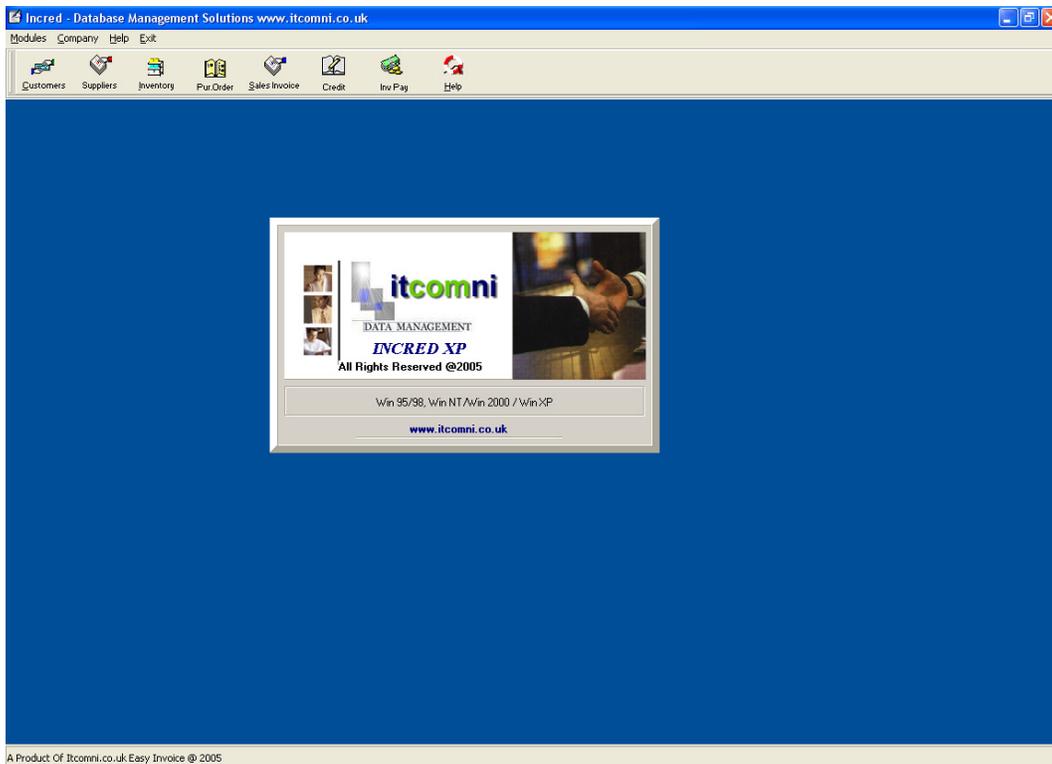
**Company Registration Form**

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"/>	

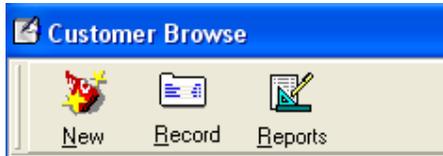


Edit: Company

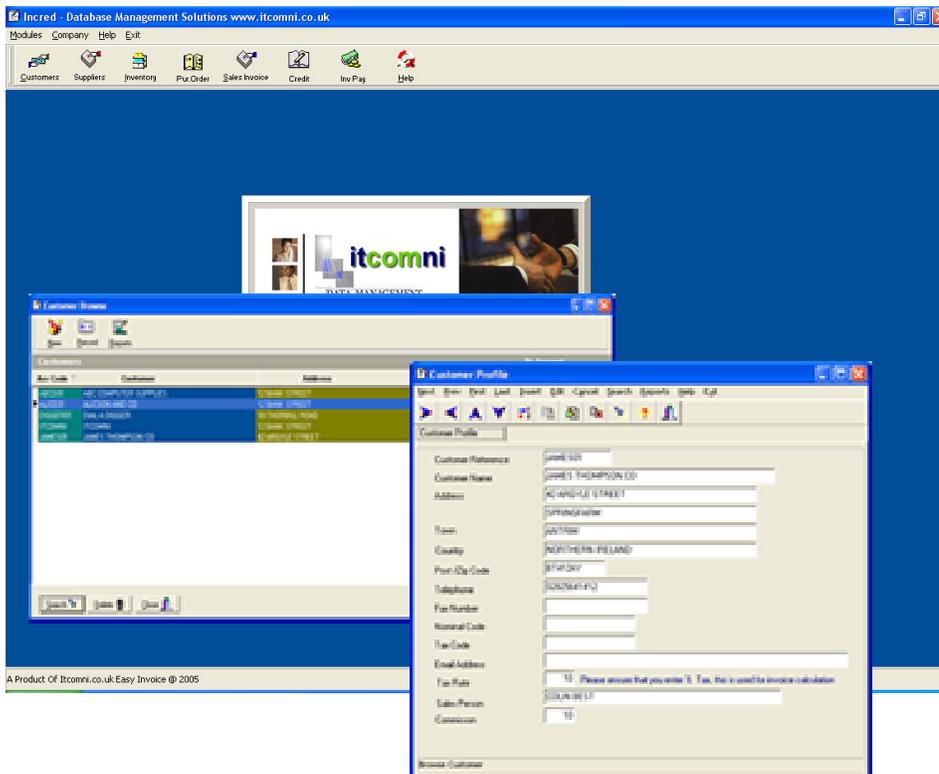
Module available – Customers – Suppliers – Inventory – Purchase Orders – Sales Invoices – Credit Notes – Invoice Payments (Buttons at top of screen)



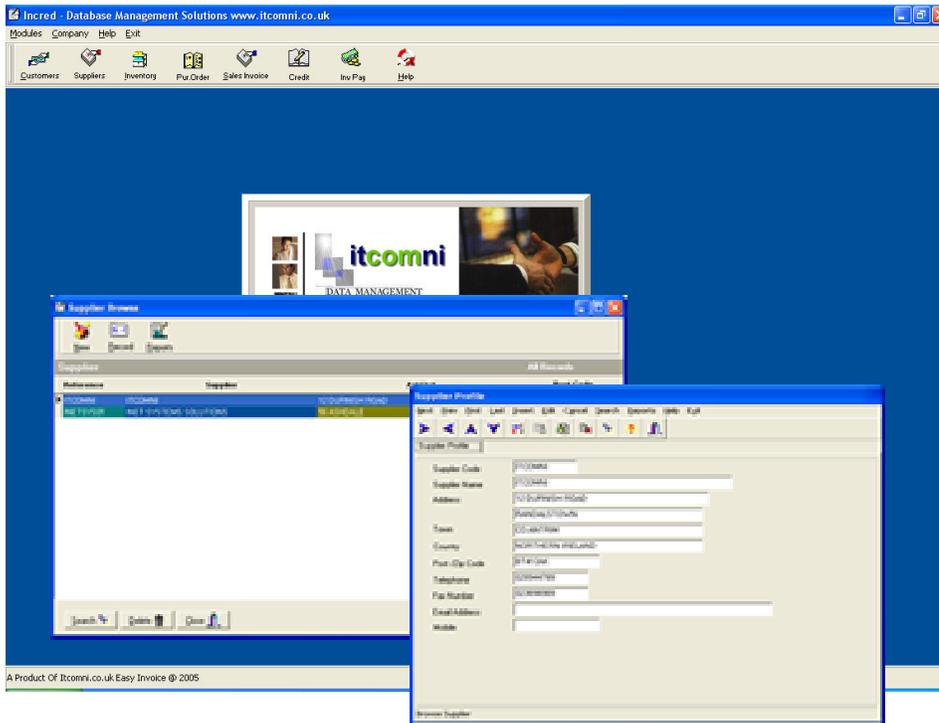
When you enter a module, the following option buttons are available. New (Add new record) – Record (Edit the currently highlighted record) – Reports (Left click will produce standard report, Right click will give you a number of report options if applicable to that Module).



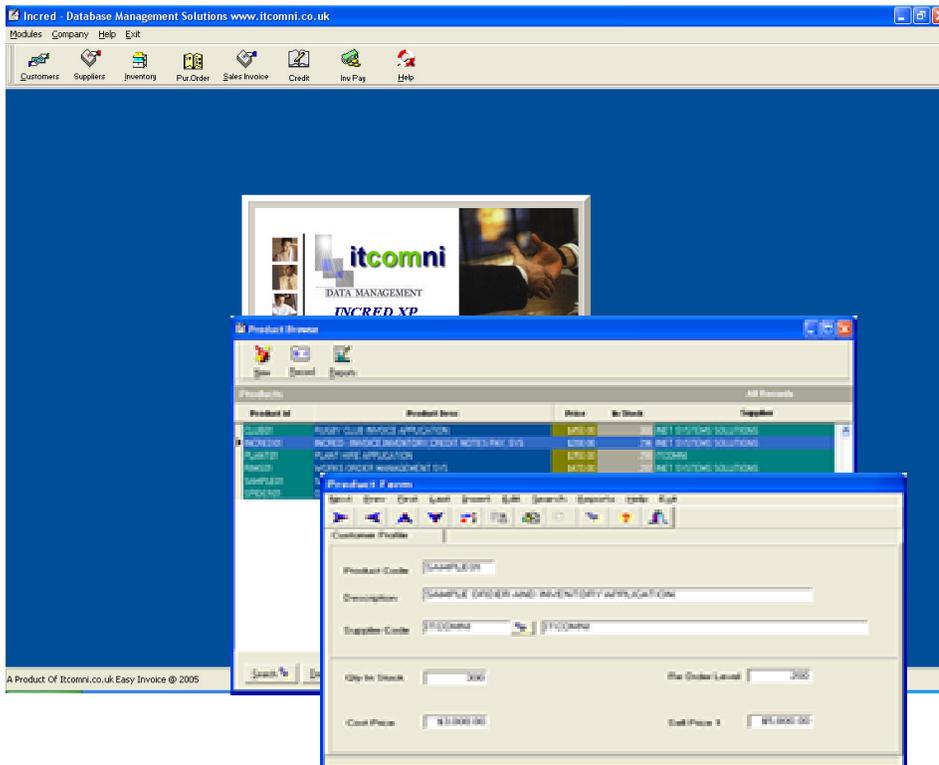
**Step two** – Create your Customer Profiles (These can also be created on the fly when creating an Invoice)



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



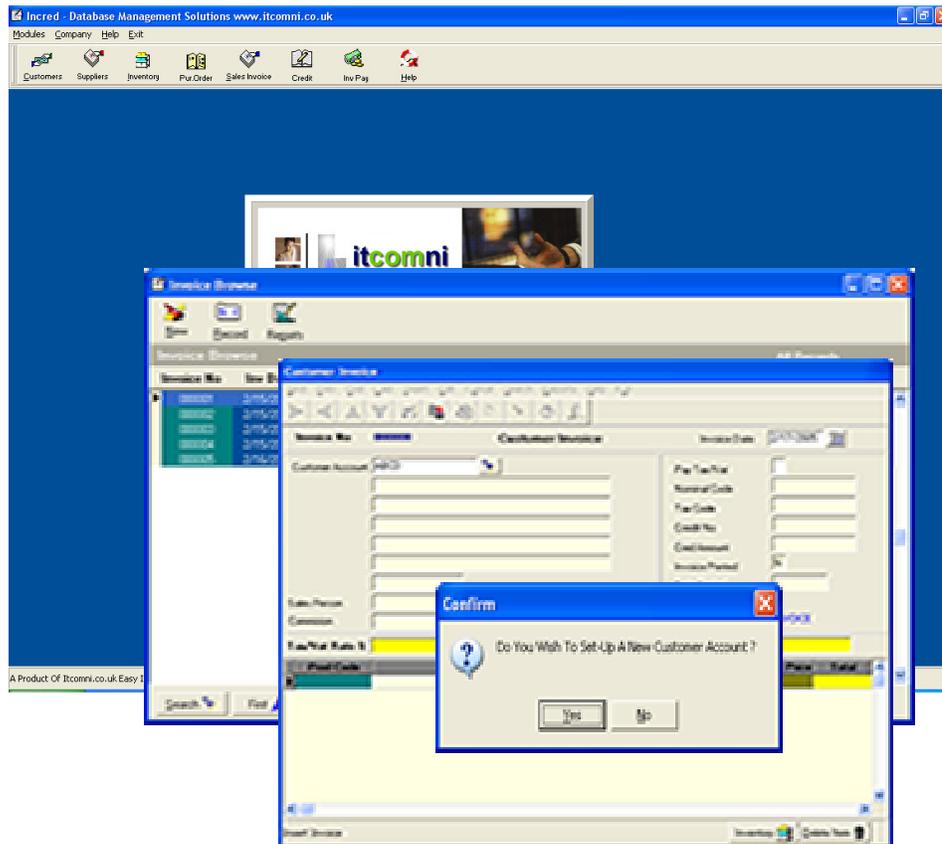
### Step four – Optional - Create your inventory profiles including current stock levels



**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.



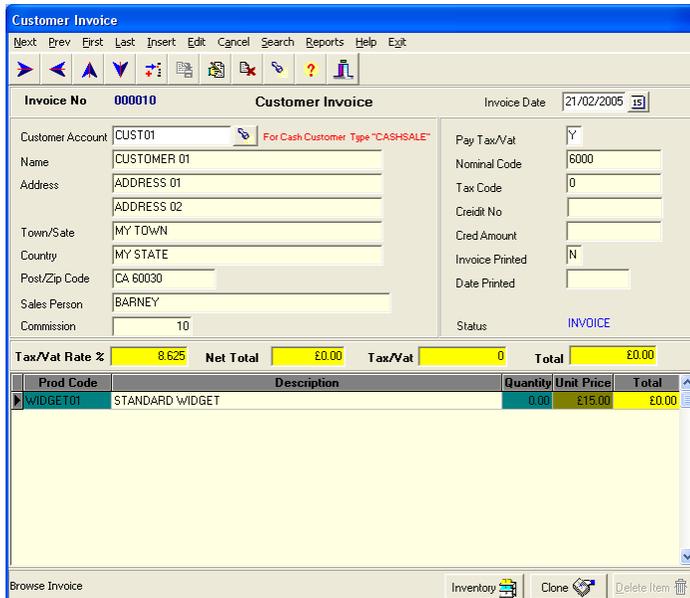
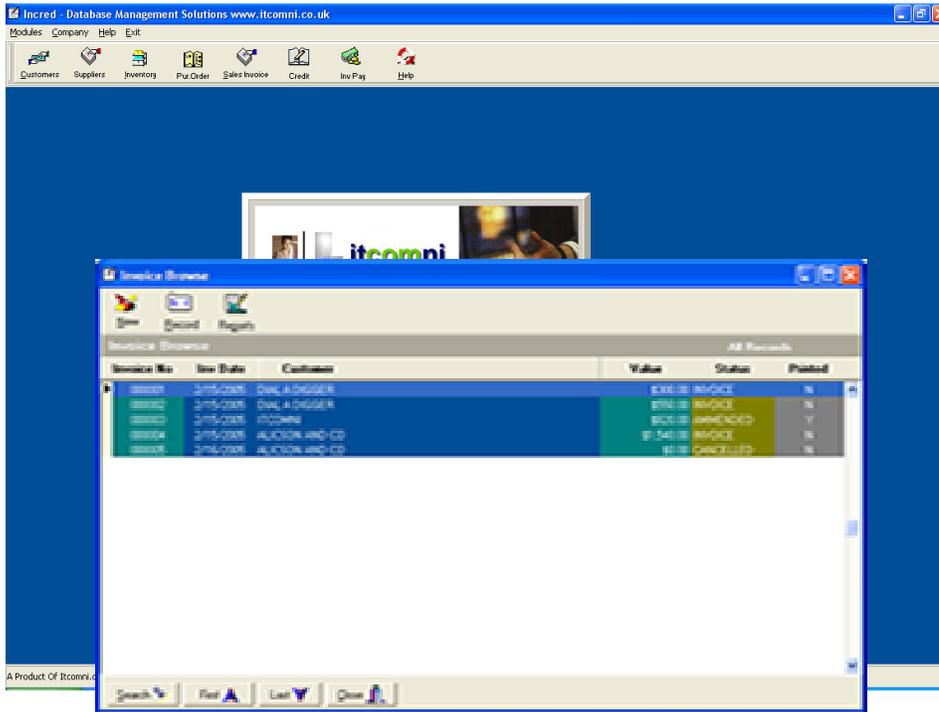
New customer can be created during Invoice Creation

The image shows a screenshot of the 'New Customer Account' form in the Incred software. The form is titled 'New Customer Account' and contains the following fields:

Customer Reference	ABC001
Customer Name	ABC COMPUTER SUPPLIES
Address	12 BARK STREET
Town	NEWTON
County	UKA
Telephone	01452 123456
Fax Number	01452 123456
Regional Code	AB001
Tax Code	
Email Address	abc@itcomni.co.uk
Tax Rate	0%
Sales Person	JAMES YOUNG
Commission	0%

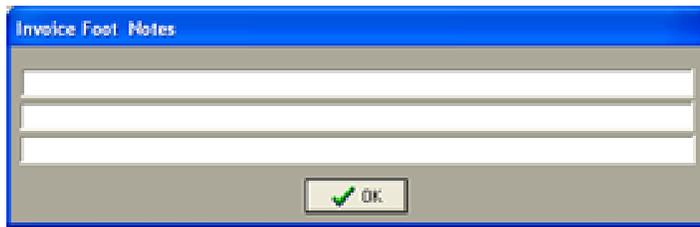
At the bottom of the form, there is a 'Save and Close' button and a 'Insert Customer' link.

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.

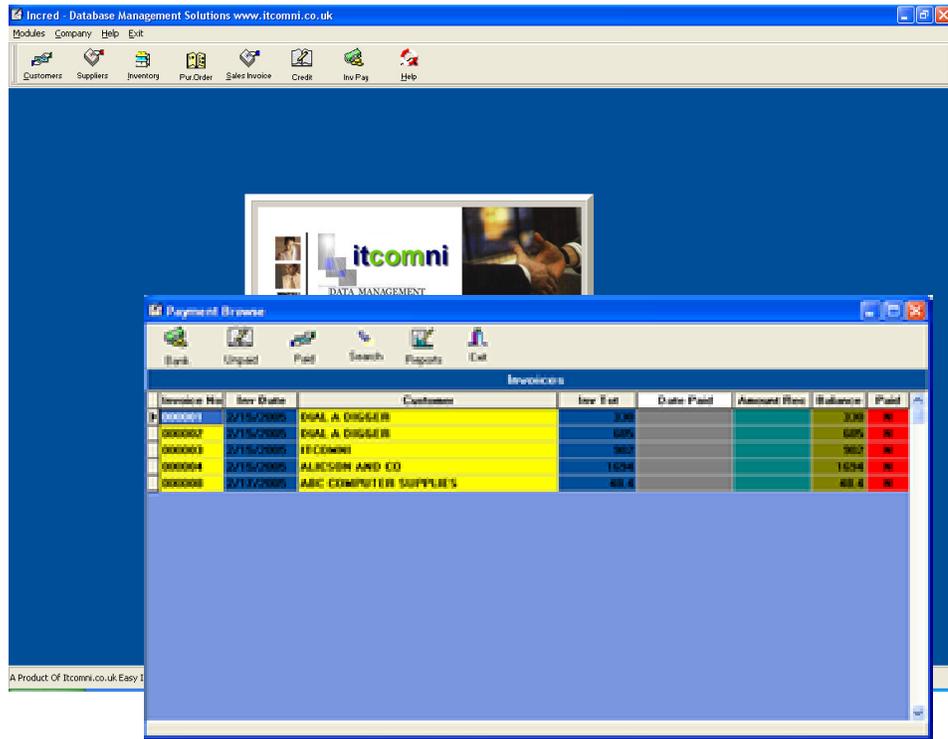
Next - Prev –First – Last - Insert New – Save – Edit - Cancel Edit – Search – Help - Close/Exit



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



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



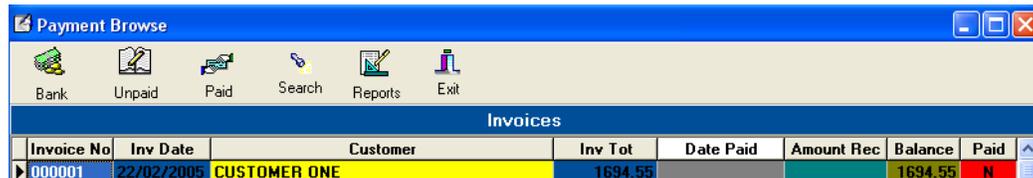
You can view unpaid or paid invoice by selecting a button.

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.

The screenshot shows the main invoice management window. At the top, there is a menu bar with icons. A dropdown 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 highlighted. Below the menu, the invoice details are displayed. 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 H 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. Below the invoice details, there is a summary table:

Tax/Vat Rate %	Net Total	Tax/Vat	Total
8.625	£1,560.00	134.55	£1,694.55

Below the summary table, there is a table of invoice items:

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

A search dialog box is open in the foreground. It has a title bar 'Search' and a close button. The text inside says: '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'. There are 'OK' and 'Cancel' buttons at the bottom.

The screenshot shows a 'Print Preview' window. The title bar says 'Print Preview'. The window contains a detailed invoice report. At the top, it says 'New Report: 21/1/2005' and 'STOCKS'. Below that, there is a table with columns: 'Description', 'Quantity', 'Unit Price', 'Total', 'Invoice No', 'Invoice Date', 'Invoice Total', 'Invoice Status', 'Invoice Type', 'Invoice Date', 'Invoice Time'. The table contains several rows of data, including 'STANDARD WIDGET' and 'STANDARD WIDGET 2'. At the bottom of the window, it says 'Page 1 of 1'.