

Entering a new invoice

Note: There are many features on the invoice screen that are not required unless they suit your particular needs. You can safely ignore those features, the software will notify you if you missed a required field.

Note: These instructions are designed for the 'Full' menu of TBS CleverPLUS.

Step 1: Click button 20 (Sales+Customers) in the 'SELLING' column.

Step 2: Click button A (Record Entry Menu) on screen 20 (Sales+Customers).

Step 3: Click button B (Invoice / Credit Entry) on screen 20a (Customer Record Entry).

Step 4: Select the client you are invoicing in the 'Client No' dropdown box near the top left of the screen. Now you will see all of the client's details on the screen. *Note: If you want edit the client's details you can double click the 'Client No' box.*

Step 5: Optionally you can enter an invoice message which will be displayed on the invoice print out. Enter your message into the 'Invoice Message' box half way down the screen.

Step 6: Click into the 'Product Code' box (light blue) in the bottom section of the screen. Select a product from the drop down menu – the description, unit price and other information will appear. *Note: If you want edit the product's details (and have owner permission) you can double click the 'Product Code' box.*

Step 7: Click into the 'Quantity' box on the same line and set the amount of that product to appear on your invoice. You can also change the unit price if you wish.

Repeat step 6 & 7 until you have entered all items for this invoice.

Step 8: Click on 'Total of Invoice' (light blue) in the top right of the screen. You will see all totals are now calculated.

Step 9: Click the 'Std Invoice' (purple) button at the top of the screen to see a preview of the invoice and print it off if you wish. If the client you selected has an email address you can also click 'Email' at the top left of the screen, the invoice will be automatically converted to a PDF and emailed to your customer with a standard message.

Step 10: If you want to enter a payment straight away click 'Receipt' near the top left of the screen. This will take you to the 'Banking / Receipts' screen which is covered in another document.

You can now enter more invoices by clicking 'New' at the top of the screen and following the same procedure or click 'Exit' to leave the invoice screen.