



Send Invoices

Accounts menu → send invoices

When Placements and Timesheets have been Invoiced, they can then be printed individually or in a batch.

- Go to the **Accounts** menu and select **Send Invoices**.

To print a single invoice

- Click the **Expand** button. The invoices are presented one at a time in a Report format.
- Use the **video** buttons to step through them for viewing.
- Use the **Print** button and select printer and numbers of copies as appropriate.

To print several invoices

- Click **Select Print** button to tick all invoices for printing. Untick any which you do not wish to send.
- Click the **Send** button.
- You will be asked to confirm that you wish to print.
- When the screen is closed the user is prompted to check the invoices have been printed correctly.
- If the user answers **Yes** then the batch is cleared for next batch of invoices.
- If the user answers **No** the whole batch will remain to be printed again.
- The user can always access each invoice through **Client accounts** or **Transaction list**.
- Before doing a new run of Invoices, check **Print Invoices** to see if last batch is still there, if it is click **Yes** to clear.



Send Invoices

Date From: 30/12/2013 Division: All Expand Select All Send Refresh

Date To: 02/06/2014 Account: All Company Select Print Report

☒ Include already Sent I M G All View Unselect All Type: All Close

Type	Our Ref.	Their Ref.	Date	Amount	Account Code	Company	Invoice Email Address	Email	Print
Invoice	10457	P0789	21/01/2014	960.00	AMS001	ABBA Ltd	yhs@iqx.co.uk	<input type="checkbox"/>	<input type="checkbox"/>
Invoice	10458	BRMBS	21/01/2014	720.00	MG42	Man Group	barbara@iqx.co.uk	<input type="checkbox"/>	<input type="checkbox"/>
Invoice	10459	BRMBS	21/01/2014	120.00	MG42	Man Group	barbara@iqx.co.uk	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Invoice	10460	TESTING	18/03/2014	84.00	513	City of Edinburgh Council - M		<input type="checkbox"/>	<input type="checkbox"/>
Invoice	10461	TESTING	18/03/2014	84.00	513	City of Edinburgh Council - M		<input type="checkbox"/>	<input type="checkbox"/>
Invoice	10462	TESTING	18/03/2014	84.00	513	City of Edinburgh Council - M		<input type="checkbox"/>	<input type="checkbox"/>
Invoice	10463	TESTING	18/03/2014	252.00	513	City of Edinburgh Council - M		<input type="checkbox"/>	<input type="checkbox"/>
Credit Note	10464	TRE	18/03/2014	-68.04	513	City of Edinburgh Council - M		<input type="checkbox"/>	<input type="checkbox"/>
Invoice	10465	TRE	18/03/2014	64.64	513	City of Edinburgh Council - M		<input type="checkbox"/>	<input type="checkbox"/>
Invoice	10467	Y6754	20/03/2014	2405.00	516	ABBA Invoices		<input type="checkbox"/>	<input type="checkbox"/>
Credit Note	10468	Y6754	20/03/2014	-2405.00	516	ABBA Invoices		<input type="checkbox"/>	<input type="checkbox"/>
Invoice	10469	Y6754	20/03/2014	455.00	516	ABBA Invoices		<input type="checkbox"/>	<input type="checkbox"/>
Invoice	10470		26/03/2014	216.00	AMS001	ABBA Ltd	temp@iqx.co.uk	<input type="checkbox"/>	<input type="checkbox"/>
Invoice	10471	UY7	03/04/2014	532.44	509	3i Group PLC		<input type="checkbox"/>	<input type="checkbox"/>
Invoice	10472	2345	03/04/2014	960.00	AMS001	ABBA Ltd	temp@iqx.co.uk	<input type="checkbox"/>	<input type="checkbox"/>

Email

The Email option allows ALL invoices to be emailed or printed, even if they are not in pdf form. The difference is that a non pdf invoice will NOT be able to have timesheets included/attached.

- Set the Invoice Date From to the desired date.
- To resend several Invoices tick Include already Sent
- Expand opens the Invoice details form, Company opens the Company form.
- Check the Invoice email addresses. To add or change use the Company button to open on the Miscellaneous view. Multiple email addresses can be entered, separated by a ; eg beazer@iqx.co.uk; bz@iqx.co.uk
- Select All will tick all the list for Emailing, unless there is no email address, in which case the Print box will be ticked.

Send will create and send an email for every ticked line, with the Invoice pdf attached and the message:

email text

Please find Invoice No.xxxx attached.

If relevant, associated timesheets are included as additional pages in the attached invoice pdf.

Regards

Your Agency Name

If you are not the addressee indicated in this message (or responsible for delivery of the message to such person), you may not copy or deliver this message to anyone. In such case, you should destroy this message and kindly notify the sender by reply email.

You will be asked if they have been sent correctly - 'Yes' will mark them as having been sent and they



will not reappear on the list next time it is opened. Then you are shown how many have been emailed or printed. It is better to say 'Yes' as you can reprint items marked as Sent but not clear items without resending.

Housekeeping

At the end of each week it is sensible to clear out the Timesheets into a subfolder to ensure smooth running. Every month or so you should also clear out the PDF folder but if you need to resend an invoice it will need the pdf to include the Timesheet. Invoice pdfs are saved with the Document ID as the name - eg IQ001235.pdf. This ID can be found on the Invoice details form on the top right hand side.

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