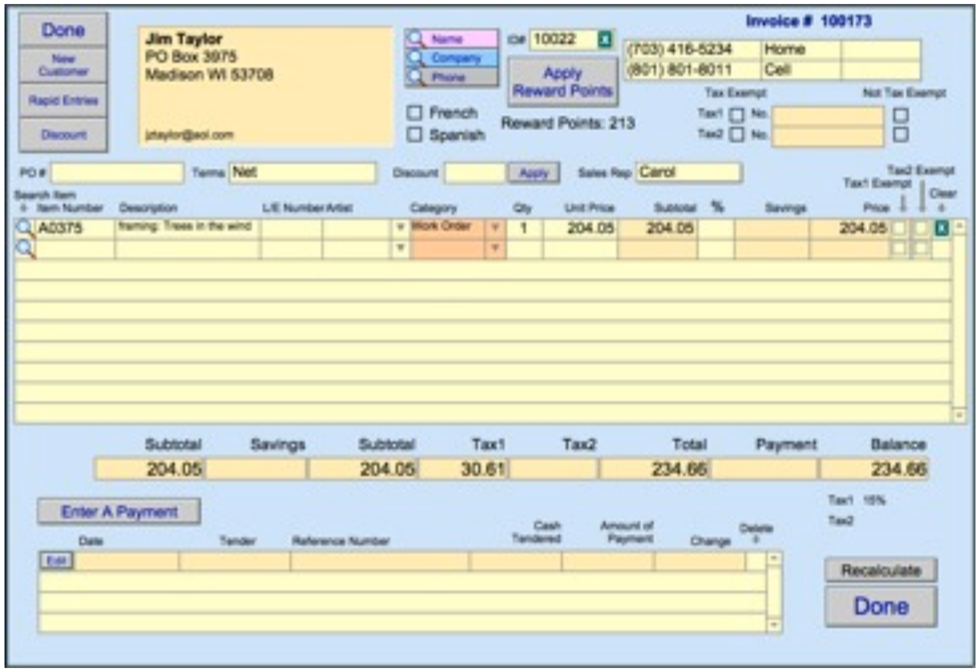
FrameReady QUICK REFERENCE page for Invoices

Write an Invoice



Line Item Entry Screen of Invoice file - modifications, product entries and payments can only be made in this screen.

For Framing:

1. Click on the Post to Invoice button (left side of the Work Order screen).
2. Click Post Only button. *The work order(s) will appear on the invoice.*

For retail Products only:

1. Click on **New Invoice** on Main Menu.
2. Click on the **magnifying glass** to type or scan the item number or search by Description or Artist.
3. Enter **Qty** if greater than one.

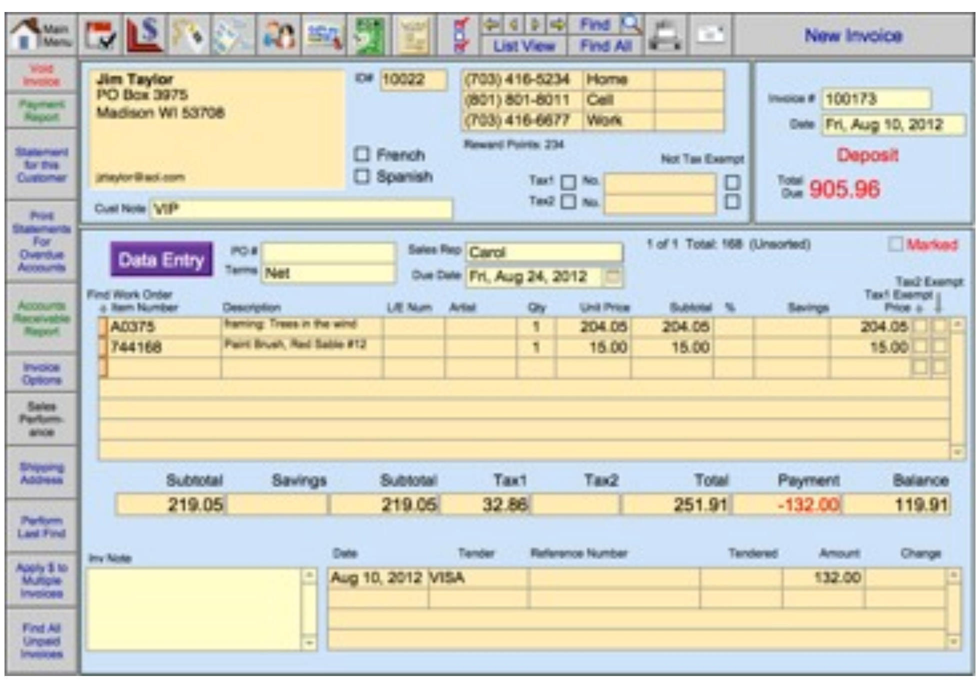
Taking a Payment

1. Click on the **Enter a Payment** button.
2. Select the **Tender** from the pop up list. If it is a check or gift card or gift certificate, enter the number in the **Reference** field.
3. The full **Amount** is always entered automatically. Manually change the amount or click on the **Calculate 50%** button for a downpayment of half.
4. Click one of the following: **Done Print Invoice**, Done Print Receipt or Done Go To Form View. If the customer does not want to make a payment after all, click Cancel. *(See Cancel Sale)*
5. You will now see the invoice screen of the Invoice file. If finished, click on the **Main Menu** button (top left).

   To **Print**, click on the Printer button (top right).

   To **Email** a pdf of the Invoice, click on the envelope (top right).

   To make changes to the invoice, click on the **Data Entry** button (purple).



Invoice screen of Invoice file - this is a display screen. Only the pale yellow (or white) fields can be modified.

Selling an item not in Product file

Manually type in the description, quantity & unit price on the invoice. Be sure to enter the Category or it will not appear on some sales reports. The best practice is to enter the item in the Product file first, then all relevant information will appear on the invoice when you enter the item number.

Deleting a retail item

In the Line Item Entry screen, click on the green square with the white x on the right side of the row you wish to delete.

Items entered on an invoice can only be deleted when open with level4. Remember that this will remove the item from the invoice but this will not put it back into inventory.

Returning a retail item

1. Create a **new invoice**.
2. Enter the **product** using the magnifying glass.
3. Change the **Qty** to a negative (Eg. -1)
4. Click on the **Enter a Payment** button.
5. Select the **Tender** as Refund or Store Credit as per your store policy.

Adding an unposted work order

All orders created for the same customer on he same day appear on the same invoice. Use the work order Job# to group different orders or, in the invoice file...

1. Click on the magnifying glass (left side)
2. Enter the **work order number** and click on the **Search** button.

All aspects of the work order will appear on the invoice including art or non-taxed labour.

Deleting/Unposting a work order

1. In the Line Item screen, click on the green square with the white x on the right side of the work order you want to remove from the invoice.

A message will appear asking if you want to unpost this work order.

2. Select **Yes** to unpost the work order. This will allow you to post it to another invoice in the future.

Leave the Invoice screen

You can leave the invoice screen at any time, however, you must enter your name in the **Order Taken By** field.

You may be asked questions if you have unfinished information Eg. Do you want to enter a customer? If you don't want to, just confirm you want to leave without making the entry.

Find all unpaid invoices for a client

1. Click on the Total Due **amount** (in red) in the top right corner of the Invoice screen.

The screen will change to show a list of all unpaid invoices for this one client.

Entering a Discount for one item

1. Click in the **%** field for the item (Line Item screen)
2. Enter the percentage as a **decimal**.

Discount retail items only

The Discount button will apply the same discount to all retail items shown on the invoice. If you have multiple items at various discounts, enter all items for one discount level (10%) and apply the discount, then enter the items at the next discount level (5%).

1. Click on the **Discount** button (top left corner).
2. Click any of the preset % button (top) or enter your own percentage as a decimal in the Discount field.
3. Click **Proceed** or press the Enter key to return to the Invoice.

Tax Exemptions & Discounts

Tax exemptions are entered in the **Contacts file** on the customer's record under the **Terms/Shipping** tab. If you enter the customer on the invoice before entering their exemption in the Contacts file, you will need to clear their name from the order and re-enter it in order to show the new information you have just added. Changes are not retro-active. This same rule applies to Customer's who always receive the same Discount. Enter it under the Terms/Shipping tab in the Contact file.

48 Hour Approval (keep in inventory)

Items with 48 Hour Approval in the Terms field will not be removed from inventory. To update the inventory, click in the Terms field on the Invoice screen and select Yes and change the Term to Net or Net/30.