# *Printing invoices and credit memos*

Customers will require a copy of the invoice/credit memo after it has been completed and checked using the preview function. You do <u>not</u> need to print **internal invoices** as they will be emailed across to the other department automatically.

To print follow the steps below.

> **Navigate: Print → Invoices**

1.   Once you have navigated via the above path, the following window will appear. Accept the single request option by clicking **OK**.
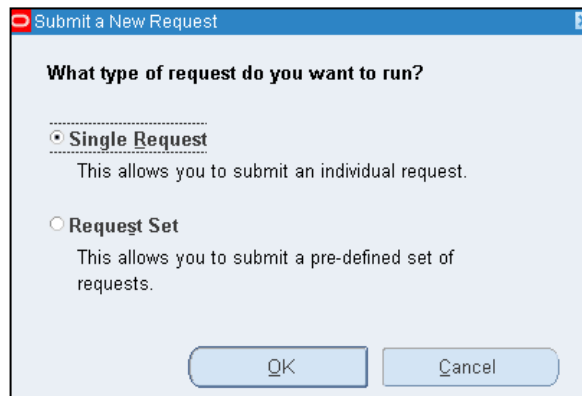
2.   The *Print Invoices* screen displays. Click in the **Name** box and click on the **List of Values** for this field.

3.   The *Reports* window lists a number of different options that are available, select **Print Selected Invoices (UFS)** and click **OK**.

   The remaining reports relate to Research Grant claim forms so do not use.
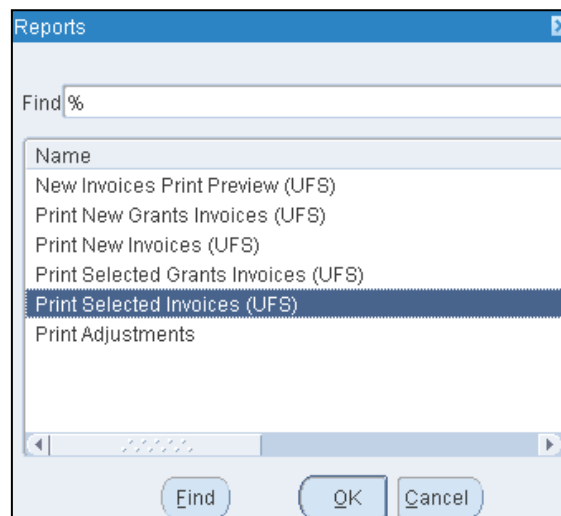
4. Complete the **Transaction Low, High** fields with the relevant invoice/credit memo number(s). This will print either a single invoice/credit memo or a range of transactions.

5. Click **OK**.

6. Click on the **Options** button: check the required printer and number of copies.

7. Click on **Submit**.

8.   After submitting, a pop up message displays with a request ID of your print and a message asking if you want to submit another request. If you need to run another print click **Yes** if not click **No**

- If you click **Yes**, the *Print Invoice* screen displays for you to repeat the process.

- If you click **No**, the main navigator screen displays.

> Should you wish to email the document to the customer
>
> - Make sure your number of copies to print is set to '0' and run the process as normal.
> - Navigate to **View, Requests, Find** and click **Refresh Data** until the phase is completed.
> - Click **View Output,** the document will display on your screen and you can send it as a PDF file to the customer.

Alternatively printing individual transactions directly from the transactions screen

Once users have completed their sales invoices they can print them directly from this screen.

1. Select the new menu option of **Reports** and then **Print Invoice**.
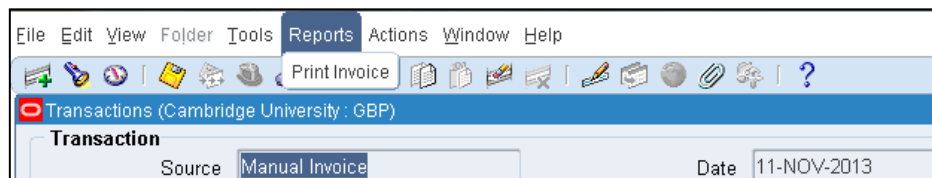
2. Click **OK** to run a single request.

3. From the list of values select the invoice report required e.g. Print Selected Invoices.

4. Enter the **transaction number** and click **OK.**

5. Under **Options**: check the printer and number of copies, amending if necessary.

6. Click **OK** and then **Submit** to run the request.