



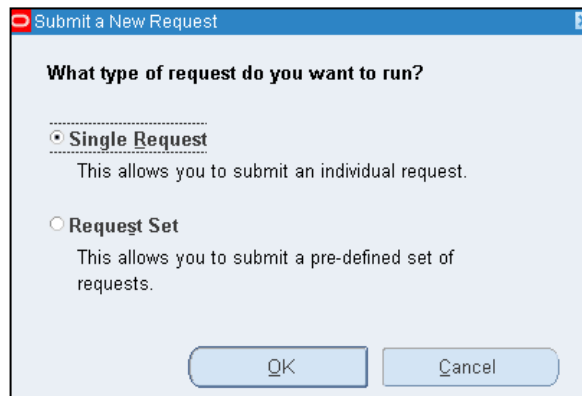
## ***Printing invoices and credit memos***

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

To print follow the steps below.

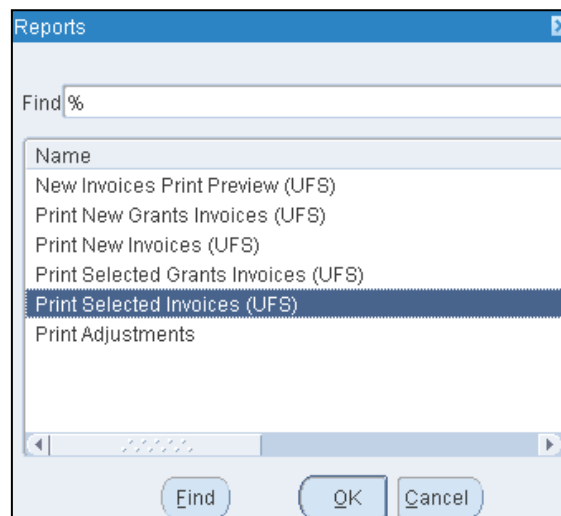
**Navigate: Print → Invoices**

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.

Parameters

Order By: Transaction Number

Transaction Class: [ ]

Transaction Type: [ ]

Transaction Number Low: [ ] ←

Transaction Number High: [ ]

Print Date Low: [ ]

Print Date High: [ ]

Customer Class: [ ]

Customer: [ ]

Installment Number: [ ]

Open Invoices Only: No

Tax Registration Number: [ ]

Random Invoices Flag: [ ]

Invoice List: [ ]

OK Cancel Clear Help

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

Print Invoices

Run this Request...

Name: Print Selected Invoices (UFS)

Operating Unit: [ ]

Parameters: Transaction Number:::791969:791969:::No:

Language: American English

Language Settings... Debug Options

At these Times...

Run the Job: As Soon as Possible

Schedule...

Upon Completion...

Save all Output Files

Layout: AR: Print Selected Invoices (UFS)

Notify: [ ]

Print to: AG\_PR005101

Options...

Help (C) Submit Cancel

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

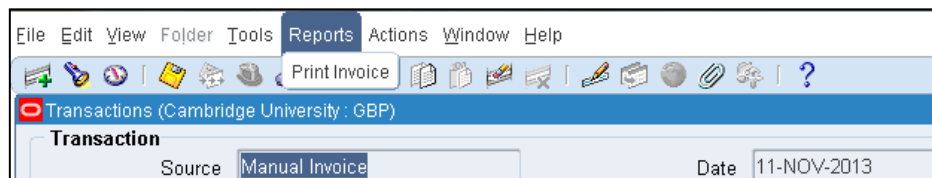
- Make sure your number of copies to print is set to '0' and run the process as normal.
- Navigate to **View, Requests, Find** and click **Refresh Data** until the phase is completed.
- Click **View Output**, the document will display on your screen and you can send it as a PDF file to the customer.

### Alternatively printing individual transactions directly from the transactions screen

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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.