## Exonet Tips and Tricks #1

## How to E-mail a copy of an Invoice or a Statement to a Customer

## When a customer calls you and says he has misplaced the Invoice or Statement you sent to him what do you do?

Why not send a copy of the Invoice or Statement by e-mail?

Go into the Debtor Account Details screen (Account > Debtors) and select the 'Transactions' Tab. Click on the Invoice you want to send and then select the Email Invoice option from the Exonet toolbar.

🗭 Debtor Account Details												
File Navigate <u>H</u> elp										\$		
TNew 🔄 Save 🖫 Save & Exit 🗙 Cancel 🛍 🚑 - 🔣 🔸 🕨 🎽 🕼 💕 📾 🖏 🕚												
									Email Inv	Email Invoice		
A/C NO: 8 Name: MARK LAWRENCE									Email Sta	Email Statement		
Details 1   Details 2   Contacts   Transactions   Orders   Notepad   History Notes   Extra Fields   Docs   Discounts/Prices									s Analysis J	oos serial	<b>I</b>	
I ✓ Reverse Sort   I ✓ Show only Unallocated												
Trans. #	Date	Transaction	InvNo	Ref 1	Ref 2	Branch Code	Due Date	Amount	Outstanding	Status	^	
327	03.03.2004	Invoice	10178			AUCKLAND	03.03.2004	\$1,530.00	\$1,530.00	Unallocated		
301	25.01.2004	Payment		D/CREDIT	. /	AUCKLAND		-\$2,624.63	-\$2,624.63	Unallocated		
300	25.01.2004	Payment		D/CREDIT	1.1.1	AUCKLAND		-\$2,624.63	-\$2,624.63	Unallocated		
299	25.01.2004	Refund		D/CREDIT	1	AUCKLAND		\$2,624.63	\$2,624.63	Unallocated		
298	25.01.2004	Refund	3	D/CREDIT		AUCKLAND		\$2,624.63	\$2,624.63	Unallocated		
297	25.01.2004	Payment		D/CREDIT		AUCKLAND		-\$2,624.63	-\$2,624.63	Unallocated		
266	27.12.2003	Invoice	10149			AUCKLAND	27.12.2003	\$2,624.63	\$2,624.63	Unallocated		
		1									~	

A copy of the Invoice will be created in Adobe PDF® format (or MS Word® format if you prefer) and automatically loaded onto an e-mail with the customer's e-mail address as the default address.

All you have to do then is click on the 'Send' button and the job is done.

It sure beats looking for a copy of the Invoice in a cardboard box.

Another time saving tip courtesy of your exonet support team at Acclaim Group Ltd.