

SALES

INTRODUCTION TO INVOICES

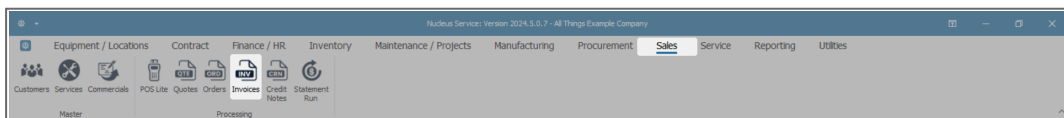
You can View, Add, Edit, and Reprint Invoices from the **Sales Invoices** listing screen.

Sales Invoices may have been created from other screens within Nucleus Service (such as Calls or Projects), but all Sales Invoices created will be listed here.

If a Sales Invoice is created from this screen without linking to a related project, call or work order, that invoice is classified as OTC (Over the Counter).

OTC (Over the Counter) **Invoices** are sales invoices that are created without going through the New Deal Sale process (and therefore the costs are not managed via Work In Progress). This is best used for a Shop Sale environment where a customer is invoiced before the stock or service is collected. This would be for a quick stock sale or internal service. Where delivery, third party services or time would be spent on work, installation or implementation, it is advised to rather follow a [New Deal Sale](#) process. A Sales Quote or Sales Order can be converted to a **Sales Invoice**, or a **Sales Invoice** can be created directly. Where stock is invoiced, a part request is created so that the stock can be issued to the invoice - its imperative to have strong controls in place to ensure that stock is issued by the store person. For a simplified **OTC Invoicing** process for stock items, see [POS Invoicing](#).

Ribbon Select **Sales > Invoices**



- The **Sales Invoices** listing screen will be displayed.

- Select the **Site** you wish to work in.
- The example has **KwaZulu-Natal** selected.

InvoiceNo	CustomerCode	CustomerName	DeptName	InvoiceDescription	InvoiceValue	Currency	ExchangeRate	InvoiceDate	TaxRate	Q/Total	Comments	BaseCurrencyTotal	CRNotes	SalesmanName	InvoiceStatus
KZ2N0000055	6028143645	GLJ Molan Distributors	Sales	Order#001126	5,977.43	ZAR	1.00	06 Aug 2024	15.00	0.00	SalesOrderInvoiceCreated#MU126005	5,977.43		Eden Rowan	New
KZ2N0000054	6075468708	MIRA Burhill CC	Sales	126000Order	6,382.50	ZAR	1.00	06 Aug 2024	15.00	0.00	Part Request.	6,382.50		Brnar Portillo	New
KZ2N0000055	6005715519	Camp Osofrot CC	Sales	MNU126010	4,830.00	ZAR	1.00	05 Aug 2024	15.00	0.00		4,830.00		Brnar Portillo	New
KZ2N0000052	6015257191	Oranges Outer Analysts	Sales	MNU126010	1,173.00	ZAR	1.00	05 Aug 2024	15.00	0.00		1,173.00		Eden Rowan	New
KZ2N0000051	6015257191	Oranges Outer Analysts	Sales	Forward Navigation	483.00	ZAR	1.00	05 Aug 2024	15.00	0.00		483.00		Eden Rowan	New
KZ2N0000050	6075468708	MIRA Burhill CC	Sales	MNU126010	4,830.00	ZAR	1.00	05 Aug 2024	15.00	0.00	Forward Navigation	4,830.00		Eden Rowan	New
KZ2N0000048	6075468708	MIRA Burhill CC	Sales	SalesOrderForward	4,830.00	ZAR	1.00	05 Aug 2024	15.00	0.00		4,830.00		Eden Rowan	New
KZ2N0000048	6075468708	MIRA Burhill CC	Sales	Forward MNU126010	4,830.00	ZAR	1.00	05 Aug 2024	15.00	0.00		4,830.00		Eden Rowan	New
KZ2N0000047	6003931995	FOMA Management	Sales	WOrders126000	6,296.25	ZAR	1.00	05 Aug 2024	15.00	0.00	Orders MNU000126	6,296.25		Eden Rowan	New
KZ2N0000044	6055478013	Warm Blade Systems	Sales		4,830.00	ZAR	1.00	25 Jun 2024	15.00	0.00	WarmBladePSL	4,830.00		Eden Rowan	New
KZ2N0000043	6065001001	Cash Sale Account	Sales		4,830.00	ZAR	1.00	18 Jun 2024	15.00	0.00	CashSale	4,830.00		Eden Rowan	New
KZ2N0000042	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	14 Jun 2024	15.00	0.00	CustomerPSL	4,830.00		Eden Rowan	New
KZ2N0000041	6065001001	Cash Sale Account	Sales		4,830.00	ZAR	1.00	19 Apr 2024	15.00	0.00	CashSale068000	4,830.00		Eden Rowan	New
KZ2N0000040	6065001001	Cash Sale Account	Sales		4,830.00	ZAR	1.00	05 Apr 2024	15.00	0.00	CashSale068001	4,830.00		Eden Rowan	New
KZ2N0000039	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	30 Apr 2024	15.00	0.00	SellOffCustomerPSL	4,830.00		Eden Rowan	New
KZ2N0000038	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	31 Jul 2024	15.00	0.00	PSLITE068	4,830.00		Eden Rowan	New
KZ2N0000037	6065001001	Cash Sale Account	Sales		5,313.00	ZAR	1.00	31 Jul 2024	15.00	0.00	SP2020 PSL	5,313.00		Eden Rowan	New
KZ2N0000036	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	03 May 2024	15.00	0.00	PSLte	4,830.00		Drew Nelson	New
KZ2N0000035	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	03 Jun 2024	15.00	0.00	Customer PSLite068	4,830.00		Brigitte B	New
KZ2N0000033	6075468708	MIRA Burhill CC	Sales		4,830.00	ZAR	1.00	31 Jul 2024	15.00	0.00	MIRA Lite 069001	4,830.00		Damer Holland	New
KZ2N0000032	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	31 Jul 2024	15.00	0.00	Invoice068001	4,830.00		Brnar Portillo	New
KZ2N0000031	6065001000	Sell Off Customer	Sales		5,313.00	ZAR	1.00	31 Jul 2024	15.00	0.00	PSLino068001	5,313.00		Faith Myers	New
KZ2N0000030	6085742234	Form Fair Publishing	Sales		5,313.00	ZAR	1.00	31 Jul 2024	15.00	0.00	FormFair PSLite068	5,313.00		Eden Rowan	New
KZ2N0000029	6065001001	Cash Sale Account	Sales		4,830.00	ZAR	1.00	31 Jul 2024	15.00	0.00	CashSalePSLte	4,830.00		Eden Rowan	New

INVOICE STATUS

- The Invoice **Status** is set to **New** by default.
- Click on the **drop-down arrow** to display the **Status** list.
- **C - Cancelled** will display a list of all the Sales Invoices with a Cancelled Status
- **N - New** will display a list of all the Sales Invoices with a New Status
- **P - Printed** will display a list of all the Invoices with a Printed Status
- Select the **Status** you wish to view.
 - The example has **N - New** status selected.

The screenshot shows the 'Sales Invoices' listing screen. A context menu is open over the 'Status' column header, showing options: 'New', 'Cancelled', 'New', and 'Printed'. The table below shows a list of sales invoices with columns for InvoiceNo, CustomerCode, CustomerName, DeptName, InvoiceDescription, InvoiceValue, Currency, ExchangeRate, InvoiceDate, TaxRate, Total, Comments, BaseCurrencyTotal, CNotes, SalesmanName, and InvoiceStatus.

InvoiceNo	CustomerCode	CustomerName	DeptName	InvoiceDescription	InvoiceValue	Currency	ExchangeRate	InvoiceDate	TaxRate	Total	Comments	BaseCurrencyTotal	CNotes	SalesmanName	InvoiceStatus
KZ2N000055	6028143645	GLT Molan Distributors	Sales	Forward Navigation	483.00	ZAR	1.00	06 Aug 2024	15.00	0.00	SalesOrderInvoiceCreate#MRU126005	5,977.43		Eden Rowan	New
KZ2N000054	6075468708	MHRA Burhill CC	Sales		4,830.00	ZAR	1.00	06 Aug 2024	15.00	0.00	Part Request.	6,382.50		Brian Portillo	New
KZ2N000053	6003715519	Carns Osofrof CC	Sales		4,830.00	ZAR	1.00	05 Aug 2024	15.00	0.00		4,830.00		Eden Rowan	New
KZ2N000052	6015257191	Oranges Outer Analysis	Sales	MRU126010	1,173.00	ZAR	1.00	05 Aug 2024	15.00	0.00		1,173.00		Eden Rowan	New
KZ2N000051	6015257191	Oranges Outer Analysis	Sales	Forward Navigation	483.00	ZAR	1.00	05 Aug 2024	15.00	0.00	MRU126010	483.00		Eden Rowan	New
KZ2N000050	6075468708	MHRA Burhill CC	Sales	MRU126010	4,830.00	ZAR	1.00	05 Aug 2024	15.00	0.00	Forward Navigation	4,830.00		Eden Rowan	New
KZ2N000049	6075468708	MHRA Burhill CC	Sales	SalesOrderForward	4,830.00	ZAR	1.00	05 Aug 2024	15.00	0.00	MRU126010	4,830.00		Eden Rowan	New
KZ2N000048	6075468708	MHRA Burhill CC	Sales	Forward MRU126010	4,830.00	ZAR	1.00	05 Aug 2024	15.00	0.00	MRU126010	4,830.00		Eden Rowan	New
KZ2N000047	6003931995	FDMA Management	Sales	WOrders126000	6,296.25	ZAR	1.00	05 Aug 2024	15.00	0.00	Orders MRU000126	6,296.25		Eden Rowan	New
KZ2N000046	6055478013	Warn Blade Systems	Sales		4,830.00	ZAR	1.00	25 Jun 2024	15.00	0.00	WarnBladePSL	4,830.00		Eden Rowan	New
KZ2N000045	6065001001	Cash Sale Account	Sales		4,830.00	ZAR	1.00	18 Jun 2024	15.00	0.00	CashSale	4,830.00		Eden Rowan	New
KZ2N000042	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	14 Jun 2024	15.00	0.00	CustomerPSL	4,830.00		Eden Rowan	New
KZ2N000041	6065001001	Cash Sale Account	Sales		4,830.00	ZAR	1.00	19 Apr 2024	15.00	0.00	CashSale068000	4,830.00		Eden Rowan	New
KZ2N000040	6065001001	Cash Sale Account	Sales		4,830.00	ZAR	1.00	05 Apr 2024	15.00	0.00	CashSale068001	4,830.00		Eden Rowan	New
KZ2N000039	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	30 Apr 2024	15.00	0.00	SellOffCustomerPSL	4,830.00		Eden Rowan	New
KZ2N000038	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	31 Jul 2024	15.00	0.00	PSLITE068	4,830.00		Eden Rowan	New
KZ2N000037	6065001001	Cash Sale Account	Sales		5,313.00	ZAR	1.00	31 Jul 2024	15.00	0.00	SP2020 PSL	5,313.00		Eden Rowan	New
KZ2N000036	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	03 May 2024	15.00	0.00	PSL	4,830.00		Eden Rowan	New
KZ2N000035	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	03 Jun 2024	15.00	0.00	Customer PSLite068	4,830.00		Brightie B	New
KZ2N000033	6075468708	MHRA Burhill CC	Sales		4,830.00	ZAR	1.00	31 Jul 2024	15.00	0.00	MHRA Lite 068001	4,830.00		Daman Holland	New
KZ2N000032	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	31 Jul 2024	15.00	0.00	Invoice068001	4,830.00		Brian Portillo	New
KZ2N000031	6065001000	Sell Off Customer	Sales		5,313.00	ZAR	1.00	31 Jul 2024	15.00	0.00	PSLite068001	5,313.00		Faith Myers	New
KZ2N000030	6085742234	Form Fair Publishing	Sales		5,313.00	ZAR	1.00	31 Jul 2024	15.00	0.00	FormFair PSLite068	5,313.00		Eden Rowan	New
KZ2N000029	6085742234	Form Fair Publishing	Sales		5,313.00	ZAR	1.00	31 Jul 2024	15.00	0.00	FormFair PSLite068	5,313.00		Eden Rowan	New
KZ2N000028	6065001001	Cash Sale Account	Sales		4,830.00	ZAR	1.00	31 Jul 2024	15.00	0.00	CashSalePSL	4,830.00		Eden Rowan	New

SALES INVOICES MAINTAIN BUTTONS

The action buttons on the ribbon menu will be available (**bold**) or unavailable (**greyed out**) depending on the **Status** filter you have selected.

- From the **Sales Invoices** listing screen, you can **Add**, **Edit** and **View** a Tax Invoice.
- Add to or edit a **Comment and / or Reference** for a sales invoice.
- **Print** a Sales Invoice or **Export** the list of Sales Invoices to an Excel Spreadsheet.

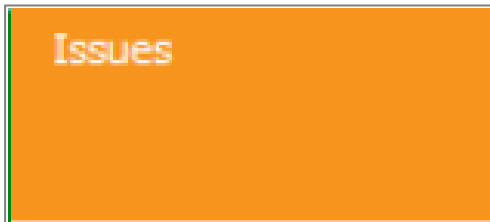
The screenshot shows the 'Sales Invoices' listing screen with the 'Status' filter set to 'Current'. The ribbon menu buttons 'Add', 'Edit', 'Comment and Reference', 'View', 'Print', and 'Export' are all bolded, indicating they are available. The table below shows a list of sales invoices with columns for InvoiceNo, CustomerCode, CustomerName, DeptName, InvoiceDescription, InvoiceValue, Currency, ExchangeRate, InvoiceDate, TaxRate, Total, Comments, BaseCurrencyTotal, CNotes, SalesmanName, and InvoiceStatus.

InvoiceNo	CustomerCode	CustomerName	DeptName	InvoiceDescription	InvoiceValue	Currency	ExchangeRate	InvoiceDate	TaxRate	Total	Comments	BaseCurrencyTotal	CNotes	SalesmanName	InvoiceStatus
KZ2N000021	6028143645	GLT Molan Distributors	Sales	MRU Invoicing	4,261.58	ZAR	1.00	26 Jul 2024	15.00	0.00		4,261.58		Cal Johns	New
KZ2N000022	6003715519	Carns Osofrof CC	Sales	MRU062001	6,222.63	ZAR	1.00	30 Jul 2024	15.00	0.00	Quotation MRU062001 - Edited.	6,222.63		Eden Rowan	New
KZ2N000024	6003715519	Carns Osofrof CC	Sales		6,486.00	ZAR	1.00	31 Jul 2024	15.00	0.00	BNPSP068001	6,486.00		Brian Portillo	New
KZ2N000026	6065001001	Cash Sale Account	Sales		10,005.00	ZAR	1.00	31 Jul 2024	15.00	0.00	CashSaleInvoicePSL	10,005.00		Eden Rowan	New
KZ2N000027	6099963015	Palmer Burghill Solu.	Sales		4,226.25	ZAR	1.00	31 Jul 2024	15.00	0.00	CustomerInvoicePSL	4,226.25		Drew Nelson	New
KZ2N000028	6075468708	MHRA Burhill CC	Sales		6,210.00	ZAR	1.00	31 Jul 2024	15.00	0.00	MHRA PSL	6,210.00		Eden Rowan	New
KZ2N000029	6065001001	Cash Sale Account	Sales		4,830.00	ZAR	1.00	31 Jul 2024	15.00	0.00	CashSalePSL	4,830.00		Eden Rowan	New
KZ2N000030	6085742234	Form Fair Publishing	Sales		5,313.00	ZAR	1.00	31 Jul 2024	15.00	0.00	FormFair PSLite068	5,313.00		Eden Rowan	New
KZ2N000031	6065001000	Sell Off Customer	Sales		5,313.00	ZAR	1.00	31 Jul 2024	15.00	0.00	PSLite068001	5,313.00		Faith Myers	New
KZ2N000032	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	31 Jul 2024	15.00	0.00	Invoice068001	4,830.00		Brian Portillo	New
KZ2N000033	6075468708	MHRA Burhill CC	Sales		4,830.00	ZAR	1.00	31 Jul 2024	15.00	0.00	MHRA Lite 068001	4,830.00		Daman Holland	New
KZ2N000035	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	03 Jun 2024	15.00	0.00	Customer PSLite068	4,830.00		Brightie B	New
KZ2N000036	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	03 May 2024	15.00	0.00	PSL	4,830.00		Drew Nelson	New
KZ2N000037	6065001001	Cash Sale Account	Sales		5,313.00	ZAR	1.00	31 Jul 2024	15.00	0.00	SP2020 PSL	5,313.00		Eden Rowan	New
KZ2N000038	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	31 Jul 2024	15.00	0.00	PSLITE068	4,830.00		Eden Rowan	New
KZ2N000039	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	30 Apr 2024	15.00	0.00	SellOffCustomerPSL	4,830.00		Eden Rowan	New
KZ2N000040	6065001001	Cash Sale Account	Sales		4,830.00	ZAR	1.00	05 Apr 2024	15.00	0.00	CashSale068001	4,830.00		Eden Rowan	New
KZ2N000041	6065001001	Cash Sale Account	Sales		4,830.00	ZAR	1.00	19 Apr 2024	15.00	0.00	CashSale068000	4,830.00		Eden Rowan	New
KZ2N000042	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	14 Jun 2024	15.00	0.00	CustomerPSL	4,830.00		Eden Rowan	New
KZ2N000043	6065001001	Cash Sale Account	Sales		4,830.00	ZAR	1.00	18 Jun 2024	15.00	0.00	CashSale	4,830.00		Eden Rowan	New
KZ2N000044	6055478013	Warn Blade Systems	Sales		4,830.00	ZAR	1.00	25 Jun 2024	15.00	0.00	WarnBladePSL	4,830.00		Eden Rowan	New
KZ2N000047	6003931995	FDMA Management	Sales	WOrders126000	6,296.25	ZAR	1.00	05 Aug 2024	15.00	0.00	Orders MRU000126	6,296.25		Eden Rowan	New
KZ2N000048	6075468708	MHRA Burhill CC	Sales	Forward MRU126010	4,830.00	ZAR	1.00	05 Aug 2024	15.00	0.00	MRU126010	4,830.00		Eden Rowan	New
KZ2N000049	6075468708	MHRA Burhill CC	Sales	SalesOrderForward	4,830.00	ZAR	1.00	05 Aug 2024	15.00	0.00		4,830.00		Eden Rowan	New

- [Send Invoices To Print Queue](#) - The Print Queue feature is only available from the **Sales Invoices** listing screen where the status is set to **Printed**.

Invoice	CustomerCode	CustomerName	DeptName	InvoiceDescription	InvoiceValue	Currency	ExchangeRate	InvoiceDate	TaxRate	Q/Total	Comments	BaseCurrencyTotal	C/Total	SalesmanName	InvoiceStatus
KZIN0000001	605183105	PH4 Skate Industries	Sales	Hemik	23.00	ZAR	1.00	01 Mar 2024	15.00	0.00		23.00		Brightie B	Printed
KZIN0000002	605183105	Banker Wraight Security	Sales	Accounts	10,764.00	ZAR	1.00	26 Apr 2024	15.00	0.00		10,764.00		Eden Rowan	Printed
KZIN0000003	6057468708	MIRA Burhill CC	Sales	Accounts	14,490.00	ZAR	1.00	26 Apr 2024	15.00	0.00		14,490.00		Eden Rowan	Printed
KZIN0000004	6005715519	Carms Ozcofr CC	Sales	01130 Accounts	14,490.00	ZAR	1.00	29 Apr 2024	15.00	0.00		14,490.00		Eden Rowan	Printed
KZIN0000005	6005715519	Carms Ozcofr CC	Sales	Accounts	12,126.06	ZAR	1.00	15 May 2024	15.00	0.00		12,126.06		Eden Rowan	Printed
KZIN0000006	6005715519	Carms Ozcofr CC	Sales	Accounts	9,660.00	ZAR	1.00	15 May 2024	15.00	0.00		9,660.00		Eden Rowan	Printed
KZIN0000007	6057468708	MIRA Burhill CC	Sales	Accounts	4,830.00	ZAR	1.00	16 May 2024	15.00	0.00		4,830.00		Eden Rowan	Printed
KZIN0000008	6050183105	Banker Wraight Security	Sales	Accounts	966.00	ZAR	1.00	16 May 2024	15.00	0.00		966.00		Eden Rowan	Printed
KZIN0000009	6099963015	Painter Burghall Solu...	Sales	Accounts	442.75	ZAR	1.00	16 May 2024	15.00	0.00		442.75		Eden Rowan	Printed
KZIN0000010	6005715519	Carms Ozcofr CC	Sales	Accounts	483.00	ZAR	1.00	17 May 2024	15.00	0.00		483.00		Eden Rowan	Printed
KZIN0000011	6005715519	Carms Ozcofr CC	Sales	Accounts	483.00	ZAR	1.00	17 May 2024	15.00	0.00		483.00		Eden Rowan	Printed
KZIN0000012	6005715519	Carms Ozcofr CC	Sales	Accounts	483.00	ZAR	1.00	17 May 2024	15.00	0.00		483.00		Eden Rowan	Printed
KZIN0000013	6005715519	Carms Ozcofr CC	Sales	Accounts	17,589.48	ZAR	1.00	21 May 2024	15.00	0.00	PR Issue Item Delete	17,589.48		Eden Rowan	Printed
KZIN0000014	6005715519	Carms Ozcofr CC	Sales	OTC Part Request	14,490.00	ZAR	1.00	16 Jul 2024	15.00	0.00		14,490.00		Eden Rowan	Printed
KZIN0000015	6024994308	Realix Ducarme Sec.	Sales	Sales Invoice PR	2,415.00	ZAR	1.00	17 Jul 2024	15.00	0.00		2,415.00		Eden Rowan	Printed
KZIN0000016	6005715519	Carms Ozcofr CC	Sales	OTC PR 132014	6,624.00	ZAR	1.00	17 Jul 2024	15.00	0.00		6,624.00		Eden Rowan	Printed
KZIN0000017	6005715519	Carms Ozcofr CC	Sales	SalesInvoiceOTC	1,240.62	ZAR	1.00	17 Jul 2024	15.00	0.00		1,240.62		Eden Rowan	Printed
KZIN0000018	6005715519	Carms Ozcofr CC	Sales	MNU032014 OTC Is...	483.00	ZAR	1.00	17 Jul 2024	15.00	0.00		483.00		Eden Rowan	Printed
KZIN0000019	6050183105	Banker Wraight Security	Sales	OTC Part Request ...	8,556.00	ZAR	1.00	18 Jul 2024	15.00	0.00		8,556.00		Eden Rowan	Printed
KZIN0000020	6050183105	Banker Wraight Security	Sales	MNU032010 Picking...	14,003.70	ZAR	1.00	18 Jul 2024	15.00	0.00		14,003.70		Eden Rowan	Printed
KZIN0000021	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	31 Jul 2024	15.00	0.00	POS Lite MNU068001	4,830.00		Eden Rowan	Printed
KZIN0000022	6057468708	MIRA Burhill CC	Sales		10,488.00	ZAR	1.00	31 Jul 2024	15.00	0.00	Invoice68001	10,488.00		Brightie B	Printed
KZIN0000046	6057468708	MIRA Burhill CC	Sales	54321	5,934.00	ZAR	1.00	01 Aug 2024	15.00	0.00	Client will collect.	5,934.00		Eden Rowan	Printed

FUNCTIONS TILE



The **Issues** tile allows you to view a list of all the items that have been issued for the selected Sales Invoice. Refer to [Invoices - Parts Issues](#)

Related Topics

- [Introduction to Invoices](#)
- [Introduction to Point of Sale \(POS\) Lite](#)
- [Add](#) a Sales Invoice
- [Edit](#) a Sales Invoice

- [View](#) a Tax Invoice
- [Comment and / or Reference for a Sales Invoice](#)
- [Print](#) or Export a Sales Invoice
- Send Invoices to [Print Queue](#)
- View a list of all items that have been [Issued](#)
- [Print Proforma Invoice](#)

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