

# SALES

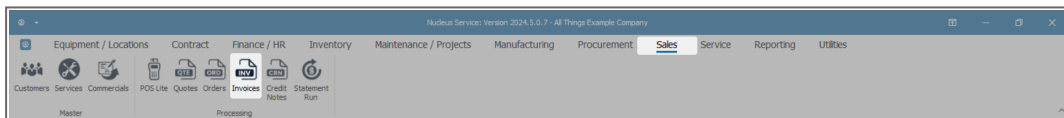
## INVOICES – PRINT SALES INVOICE

The first time an invoice is printed, it will state: **Tax Invoice**. Each time thereafter, it will state **Copy - Tax Invoice**.

If you need to re-print an original Tax Invoice due to a network connection issue, etc., then you will need to use the **Print Queue Reprint** functionality.

When using the '**Email**' option to send a Sales Invoice, note that it will be emailed via the **Nucleus Service Email Service** on the **server** and not from Microsoft Outlook on your desktop.

### Ribbon Select **Sales > Invoices**



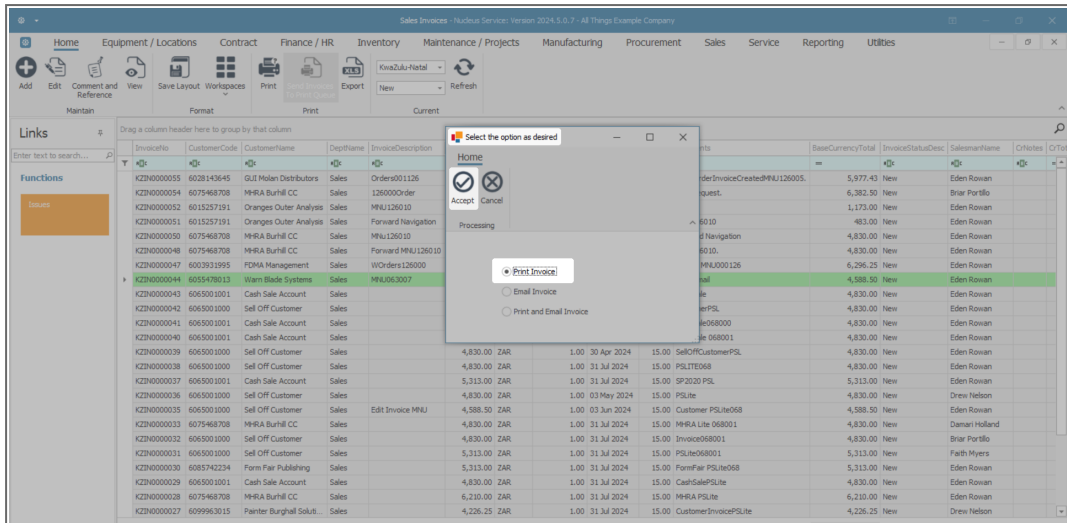
- The **Sales Invoices** listing screen will be displayed.
- Select the **Site** where the invoice can be located.
  - The example has **KwaZulu-Natal** selected.
- Ensure that the **Status** is set to **New Order**.
  - Refer to the **Introduction** above for explanation on printing previously emailed invoices.
- Select the **row** of the **invoice** you wish to print.
- Click on **Print**.

InvoiceNo	CustomerCode	CustomerName	DeptName	InvoiceDescription	InvoiceValue	Currency	ExchangeRate	InvoiceDate	TaxRate	Comments	BaseCurrencyTotal	InvoiceStatus	SalesmanName	C/Notes
KZN0000055	6028143645	GLJ Molan Distributors	Sales	Orders001126	5,977.43	ZAR	1.00	06 Aug 2024	15.00	SalesOrderInvoiceCreate#MHU126005.	5,977.43	New	Eden Rowan	
KZN0000054	6075468708	MHRA Burhill CC	Sales	126000Order	6,382.50	ZAR	1.00	06 Aug 2024	15.00	Part Request.	6,382.50	New	Briar Porflio	
KZN0000052	6015257191	Oranges Outer Analysts	Sales	MHU126010	1,173.00	ZAR	1.00	05 Aug 2024	15.00		1,173.00	New	Eden Rowan	
KZN0000051	6015257191	Oranges Outer Analysts	Sales	Forward Navigation	483.00	ZAR	1.00	05 Aug 2024	15.00	MHU126010	483.00	New	Eden Rowan	
KZN0000050	6075468708	MHRA Burhill CC	Sales	MHU126010	4,830.00	ZAR	1.00	05 Aug 2024	15.00	Forward Navigation	4,830.00	New	Eden Rowan	
KZN0000048	6075468708	MHRA Burhill CC	Sales	Forward MHU126010	4,830.00	ZAR	1.00	05 Aug 2024	15.00	MHU126010	4,830.00	New	Eden Rowan	
KZN0000047	6003919995	FPMA Management	Sales	WOrders126000	6,296.25	ZAR	1.00	05 Aug 2024	15.00	Orders MHU000126	6,296.25	New	Eden Rowan	
KZN0000044	6055478013	Warm Blade Systems	Sales	MHU063007	4,588.50	ZAR	1.00	25 Jun 2024	15.00	Print Email	4,588.50	New	Eden Rowan	
KZN0000043	6065001001	Cash Sale Account	Sales		4,830.00	ZAR	1.00	18 Jun 2024	15.00	CashSale	4,830.00	New	Eden Rowan	
KZN0000042	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	14 Jun 2024	15.00	CustomerPSL	4,830.00	New	Eden Rowan	
KZN0000041	6065001001	Cash Sale Account	Sales		4,830.00	ZAR	1.00	19 Apr 2024	15.00	CashSale068000	4,830.00	New	Eden Rowan	
KZN0000040	6065001001	Cash Sale Account	Sales		4,830.00	ZAR	1.00	05 Apr 2024	15.00	CashSale068001	4,830.00	New	Eden Rowan	
KZN0000039	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	30 Apr 2024	15.00	SellOffCustomerPSL	4,830.00	New	Eden Rowan	
KZN0000038	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	31 Jul 2024	15.00	PSLITE068	4,830.00	New	Eden Rowan	
KZN0000037	6065001001	Cash Sale Account	Sales		5,313.00	ZAR	1.00	31 Jul 2024	15.00	SP2020 PSL	5,313.00	New	Eden Rowan	
KZN0000036	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	03 May 2024	15.00	PSLITE	4,830.00	New	Drew Nelson	
KZN0000035	6065001000	Sell Off Customer	Sales		4,588.50	ZAR	1.00	03 Jun 2024	15.00	Customer PSLite068	4,588.50	New	Eden Rowan	
KZN0000033	6075468708	MHRA Burhill CC	Sales	Edit Invoice MHU	4,830.00	ZAR	1.00	31 Jul 2024	15.00	MHRA Lite 068001	4,830.00	New	Daman Holland	
KZN0000032	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	31 Jul 2024	15.00	Invoice068001	4,830.00	New	Briar Porflio	
KZN0000031	6065001000	Sell Off Customer	Sales		5,313.00	ZAR	1.00	31 Jul 2024	15.00	PSLITE068001	5,313.00	New	Faith Myers	
KZN0000030	6085742234	Form Fair Publishing	Sales		5,313.00	ZAR	1.00	31 Jul 2024	15.00	FormFair PSLite068	5,313.00	New	Eden Rowan	
KZN0000029	6065001001	Cash Sale Account	Sales		4,830.00	ZAR	1.00	31 Jul 2024	15.00	CashSalePSLITE	4,830.00	New	Eden Rowan	
KZN0000028	6075468708	MHRA Burhill CC	Sales		6,210.00	ZAR	1.00	31 Jul 2024	15.00	MHRA PSLite	6,210.00	New	Eden Rowan	
KZN0000027	6099963015	Parnter Burghall Solut.	Sales		4,226.25	ZAR	1.00	31 Jul 2024	15.00	CustomerInvoicePSLITE	4,226.25	New	Drew Nelson	

- The **Select the option as desired** screen will display.
  - **Print Invoice** will open the Invoice in the Report Preview to view, print, export or email.
  - **Email Invoice** will attach documents, add recipients, the system will create a .pdf and email the Invoice.
  - **Print and Email Invoice** will display both the Report Preview and Email screens.

## PRINT TAX INVOICE

- To print the Tax Invoice, click on the **Print Invoice** radio button.
- Click on **Accept**.

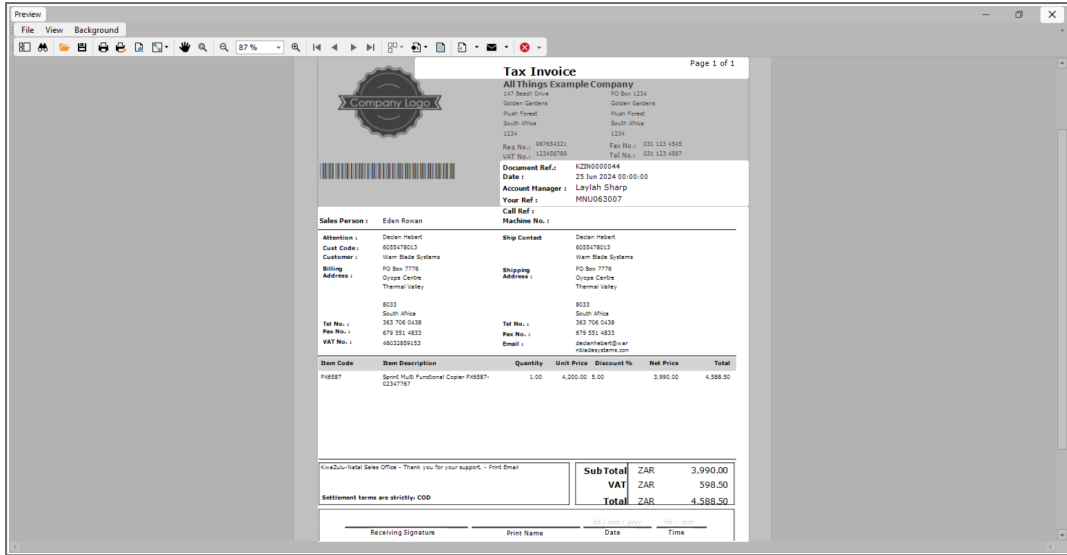


- The **Report Preview** screen will display.



Note that the header reads **Tax Invoice**. The first time an invoice is printed, it will state: **Tax Invoice**. Each time thereafter, it will state **Copy - Tax Invoice**.

- From the preview screen you can make cosmetic changes to the Tax Invoice, as well as **Save, Zoom, Add a Watermark, Export** or **Email** from the preview screen.
- Click on **Close** to return to the **Sales Invoices** listing screen.

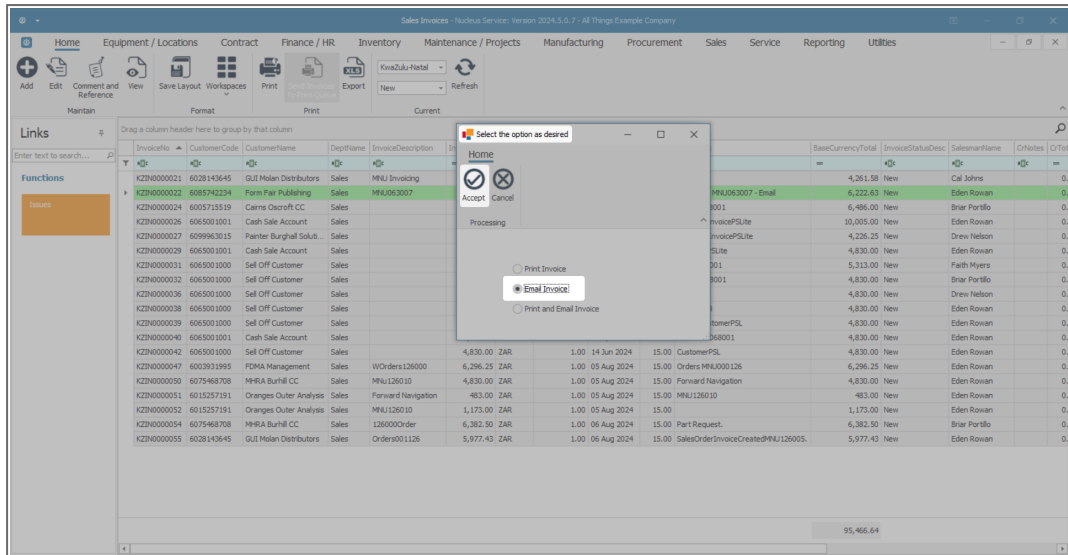


## EMAIL INVOICE / PRINT AND EMAIL INVOICE

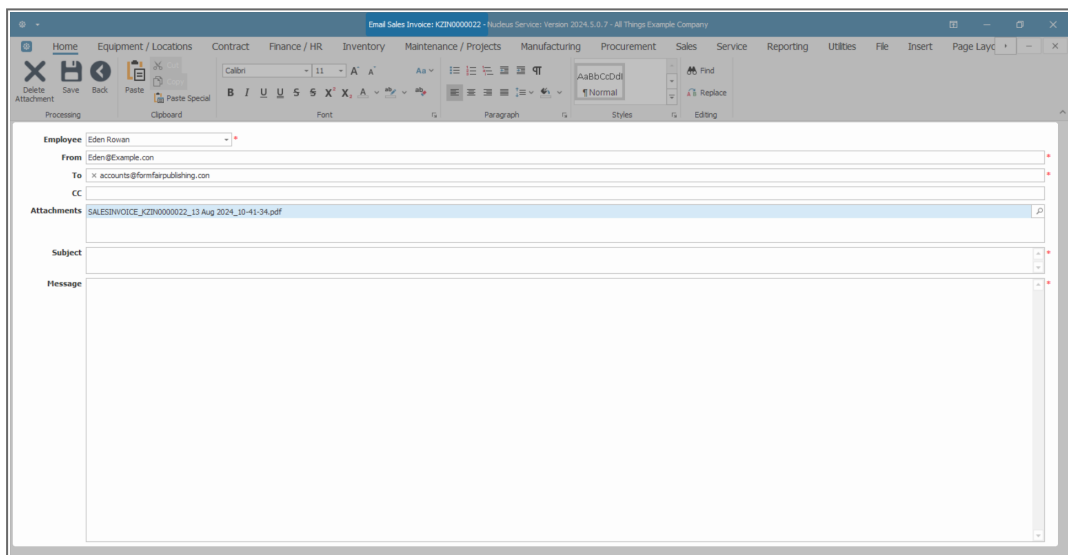


If you get an error when trying to email the document, ask your administrator to make sure that the correct shared folder location has been configured in Nucleus Service and that you have the relevant folder rights to access the shared folder on the server.

- From the **Select the option** as desired screen -
- Click on the **Email Invoice** radio button.
- Click on **Accept**.



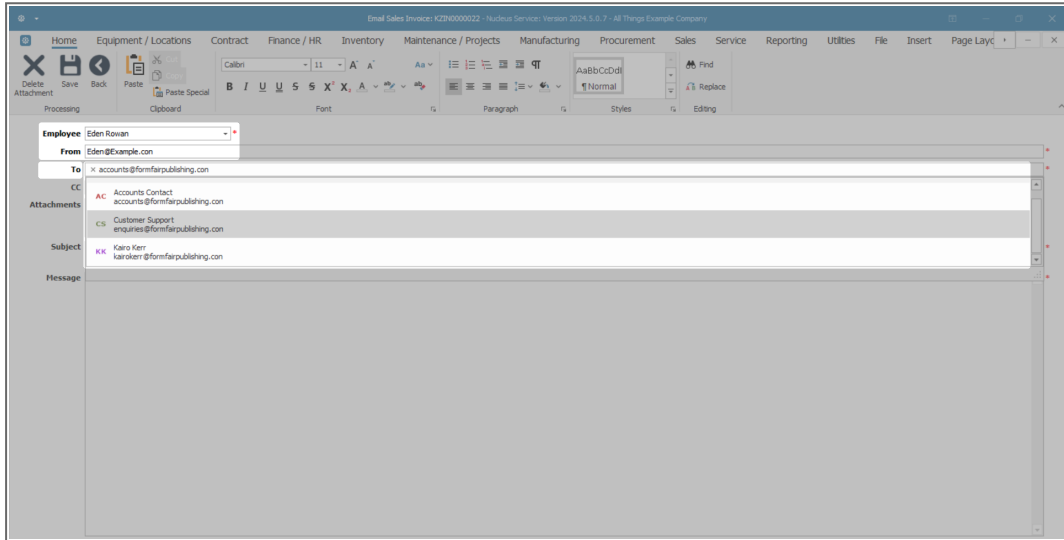
- The **Email Sales Invoice: KZIN [ ]** screen will display, for both Email Invoice and Print and Email Invoice options.



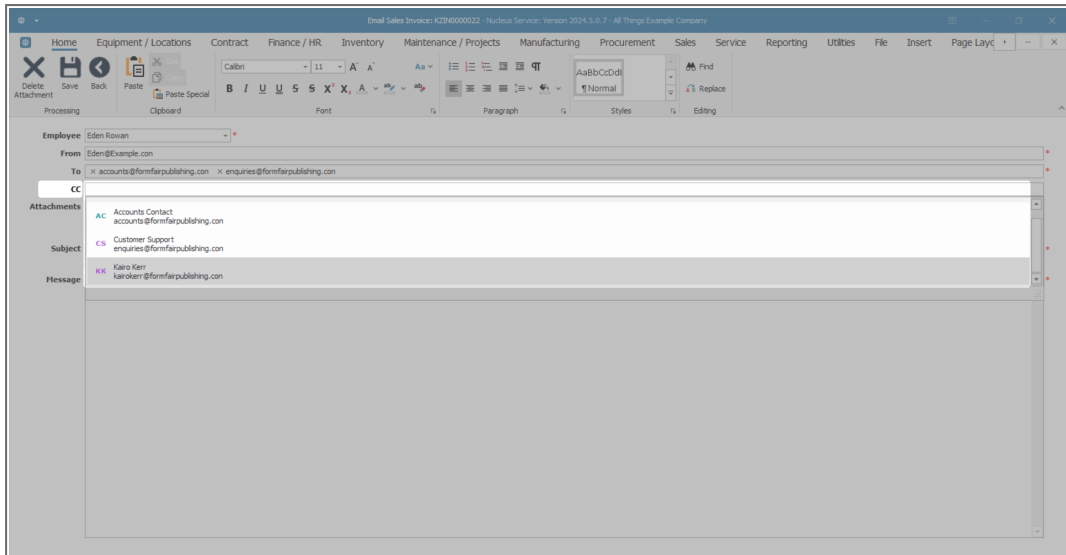
## EMAIL HEADER

- **Employee:** The employee who is currently logged on will display in the employee field. Click on the **drop-down arrow** to choose an alternative employee name, if required.

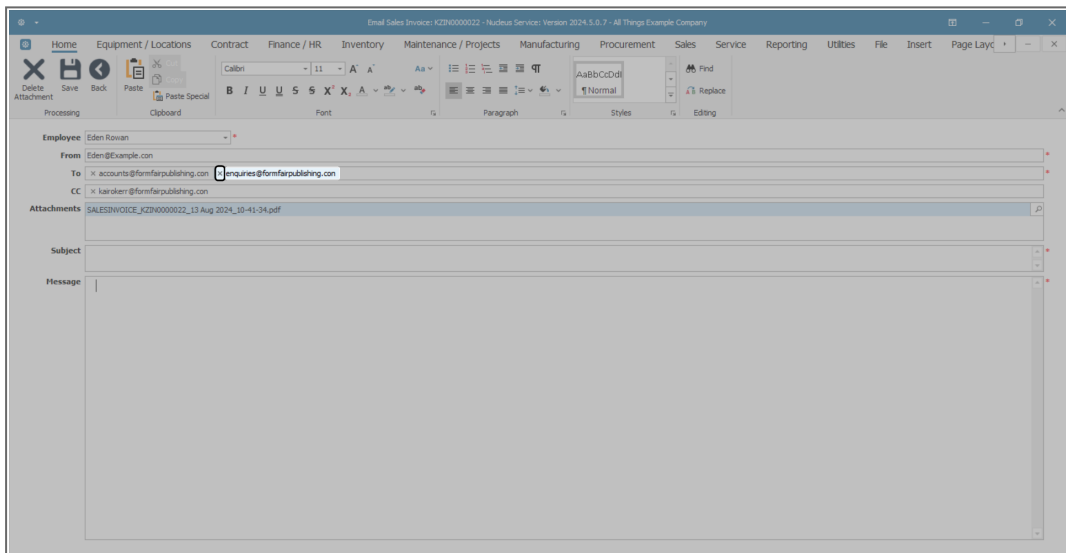
- **From:** The email address of the employee will display in this field.
- **To:** To add or change a contact email address -
  - Click in the **row** to display a **drop-down menu** with the linked email address(es) for this customer.
  - Click on the **email address** of the contact that you wish to add.
  - The selected email address will be added to the row.



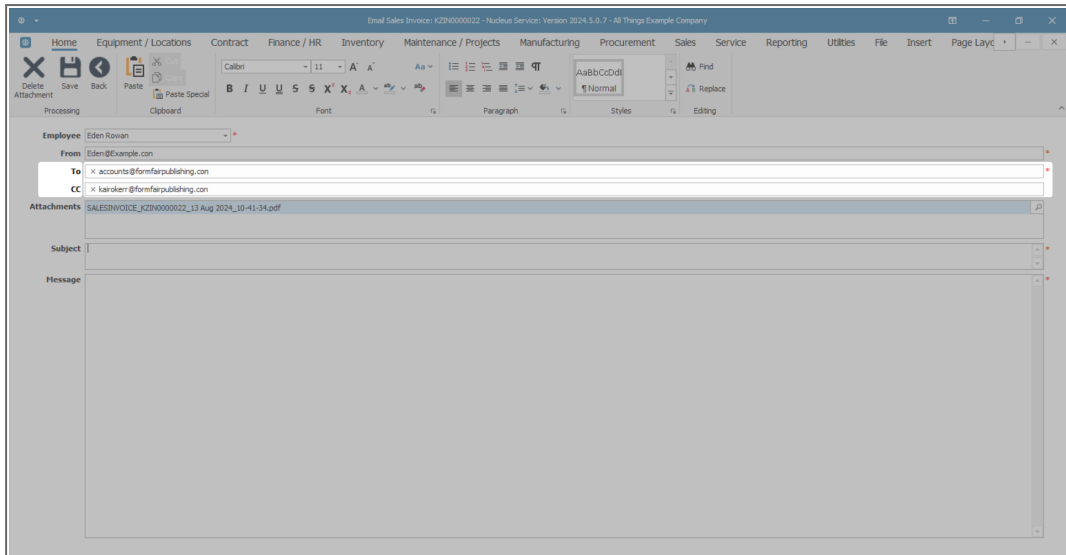
- **CC:** If a group email address has been set up on the order or accounts contact, then the group email address will display here.
  - Alternatively click in the **row** to display a **drop-down menu** with the linked email addresses for this customer.
  - Click on the **email address** of the contact that you wish to add.
  - The selected email address(es) will be added to the row.



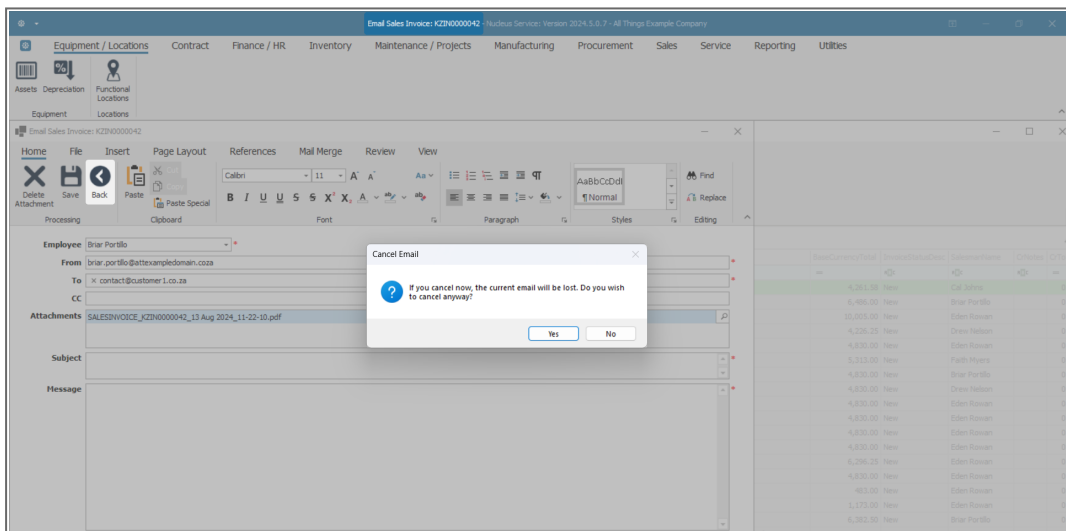
- If you wish to **remove** an email address from the row, click on the **X** icon.



- This example has email addresses added to **To:accounts@formfairpublishing.com** and **CC:kairoker@formfairpublishing.com**.



Note: If you have clicked on the **Back** ribbon button in error, you will receive a **Cancel Email** message stating, "If you cancel now, the current email will be lost. Do you wish to cancel anyway?"



If you click **Yes**, the email will not be sent and you will have to go to the **Printed** status list to find the email and follow the instructions above to email the document. (If



you click **No**, you will remain in the **Email Sales Invoice: KZIN [ ]** screen.)

InvoiceNo	CustomerCode	CustomerName	DepName	InvoiceDescription	InvoiceValue	Currency	ExchangeRate	InvoiceDate	TaxRate	Comments	BaseCurrencyTotal	InvoiceStatusDesc	SalesmanName	OTot
KZIN0000055	6028143645	GLJ Molen Distributors	Sales	MNU063004	9,698.48	ZAR	1.00	07 Aug 2024	15.00	Comment and Reference Sales Invoic...	9,698.48	Printed	Briar Porfflo	
KZIN0000055	6005715519	Caime Oacsoft CC	Sales	MNU063002	4,830.00	ZAR	1.00	05 Aug 2024	15.00		4,830.00	Printed	Briar Porfflo	
KZIN0000049	6075468708	MHRA Burhill CC	Sales	MNU063002	4,830.00	ZAR	1.00	05 Aug 2024	15.00		4,830.00	Printed	Eden Rowan	
KZIN0000049	6075468708	MHRA Burhill CC	Sales	MNU063007	4,830.00	ZAR	1.00	05 Aug 2024	15.00	Email	4,830.00	Printed	Eden Rowan	
KZIN0000049	6075468708	MHRA Burhill CC	Sales	54321	5,934.00	ZAR	1.00	01 Aug 2024	15.00	Client will collect.	5,934.00	Printed	Eden Rowan	
KZIN0000049	6055478013	Warm Blade Systems	Sales	MNU063007	4,388.50	ZAR	1.00	25 Jun 2024	15.00	Print Email	4,388.50	Printed	Eden Rowan	
KZIN0000049	6006561152	Gardening Peshoff Ou	Sales	MNU063007	4,830.00	ZAR	1.00	18 Jun 2024	15.00	Email Report L	4,830.00	Printed	Eden Rowan	
KZIN0000042	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	14 Jun 2024	15.00	Customer PSL	4,830.00	Printed	Eden Rowan	
KZIN0000041	6065001001	Cash Sale Account	Sales		4,830.00	ZAR	1.00	19 Apr 2024	15.00	CashSale068000	4,830.00	Printed	Eden Rowan	
KZIN0000037	6065001001	Cash Sale Account	Sales		5,313.00	ZAR	1.00	31 Jul 2024	15.00	SP2020 PSL	5,313.00	Printed	Eden Rowan	
KZIN0000035	6065001000	Sell Off Customer	Sales	Edit Invoice MNU	4,588.50	ZAR	1.00	03 Jun 2024	15.00	Customer PSLite068	4,588.50	Printed	Eden Rowan	
KZIN0000033	6075468708	MHRA Burhill CC	Sales	Cancel Email	4,830.00	ZAR	1.00	31 Jul 2024	15.00	cancel email	4,830.00	Printed	Danan I Holland	
KZIN0000030	6085742234	Form Fair Publishing	Sales	EmailingMNU063007	5,047.35	ZAR	1.00	31 Jul 2024	15.00	MNU063007.	5,047.35	Printed	Eden Rowan	
KZIN0000028	6075468708	MHRA Burhill CC	Sales	Email Invoice	6,210.00	ZAR	1.00	31 Jul 2024	15.00	MHRA PSLite Email	6,210.00	Printed	Eden Rowan	
KZIN0000025	6075468708	MHRA Burhill CC	Sales		10,488.00	ZAR	1.00	31 Jul 2024	15.00	Invoice068001	10,488.00	Printed	Brigitte B	
KZIN0000023	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	31 Jul 2024	15.00	PSLite MNU068001	4,830.00	Printed	Eden Rowan	
KZIN0000022	6085742234	Form Fair Publishing	Sales	MNU063007	6,222.63	ZAR	1.00	30 Jul 2024	15.00	QuoteLite MNU063007 - Email	6,222.63	Printed	Eden Rowan	
KZIN0000020	6090183105	Bariker Wraight Security	Sales	MNU032010 Picking	14,003.70	ZAR	1.00	18 Jul 2024	15.00		14,003.70	Printed	Eden Rowan	
KZIN0000019	6090183105	Bariker Wraight Security	Sales	OTC Part Request	8,556.00	ZAR	1.00	18 Jul 2024	15.00		8,556.00	Printed	Eden Rowan	
KZIN0000018	6005715519	Caime Oacsoft CC	Sales	MNU032014 OTC Is.	483.00	ZAR	1.00	17 Jul 2024	15.00		483.00	Printed	Eden Rowan	
KZIN0000017	6005715519	Caime Oacsoft CC	Sales	SalesInvoiceOTC	1,240.62	ZAR	1.00	17 Jul 2024	15.00		1,240.62	Printed	Eden Rowan	
KZIN0000016	6005715519	Caime Oacsoft CC	Sales	OTC PR 132014	6,624.00	ZAR	1.00	17 Jul 2024	15.00		6,624.00	Printed	Eden Rowan	
KZIN0000015	6024994308	Realinx Ducarme Sec.	Sales	Sales Invoice PR	2,415.00	ZAR	1.00	17 Jul 2024	15.00		2,415.00	Printed	Eden Rowan	
KZIN0000014	6005715519	Caime Oacsoft CC	Sales	OTC Part Request	14,490.00	ZAR	1.00	16 Jul 2024	15.00		14,490.00	Printed	Eden Rowan	

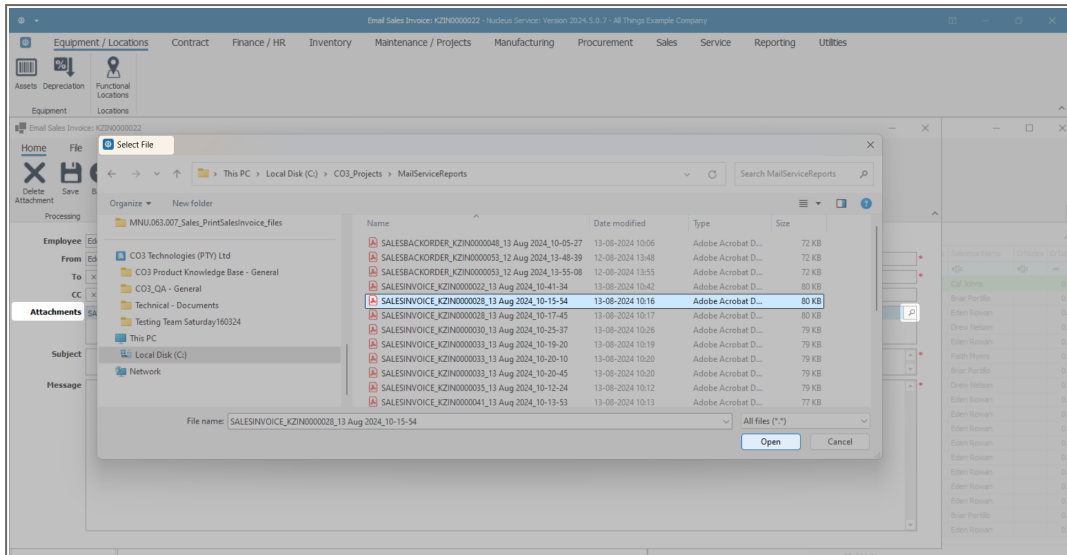
## EMAIL ATTACHMENTS

- **Attachments:** Nucleus Service will create a PDF of the order and attach it automatically (you can attach additional documentation if required).

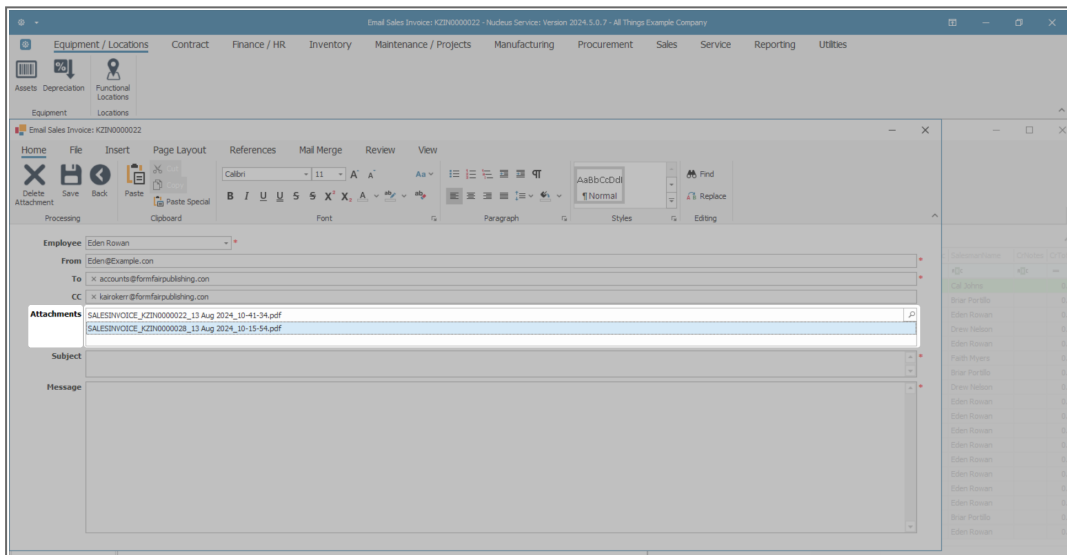


If there are outstanding parts that have not been issued, a Back Order report will also be attached.

- To add an additional attachment, click on the **search** button in the **Attachments** field to display the **Select File** window.
- You can **browse** to find the file location of the document you wish to attach, then **click** on the file you wish to attach.
- Once you have selected the file, click on **Open**.



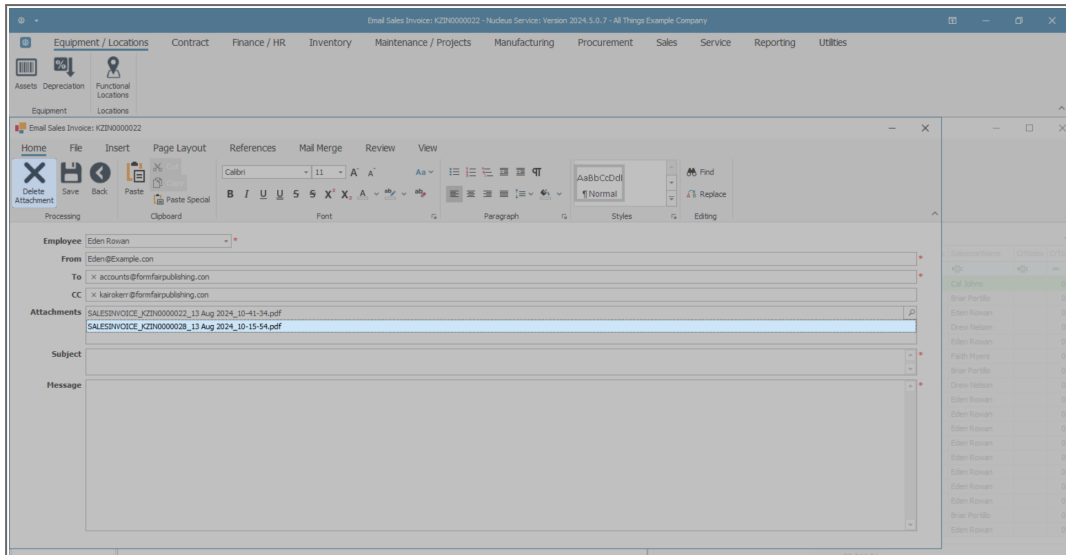
- The document has been added as an **Attachment**.



## Delete Attachment

You may choose to delete an obsolete or incorrectly attached document.

- Click on the **attachment** you wish to remove.
- Click on **Delete Attachment**.



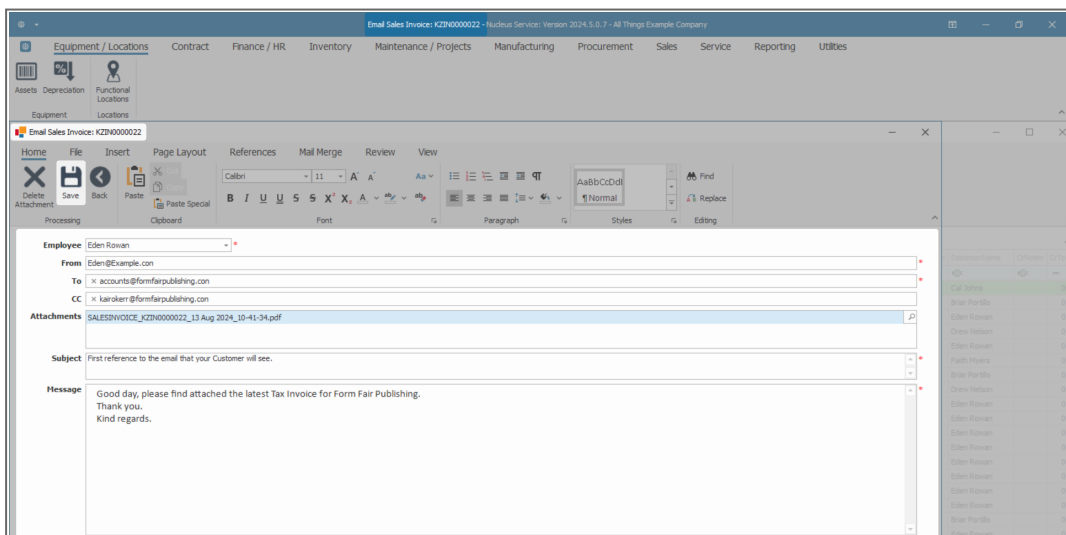
## EMAIL SUBJECT AND MESSAGE

- **Subject:** Click in the text box to type the email subject line.



Remember that this is the first reference to the email that your Customer will see.

- **Message:** Type an email text message.
- Once you have completed your email, click on **Save**.



- You will return to the **Sales Invoices** listing screen.



You will not be able to view the Invoice in the **New** Status list.

- Click on the **drop-down arrow** to change the **Status** to **Printed**.

InvoicNo	CustomerCode	CustomerName	DepName	InvoiceDescription	InvoiceValue	Currency	ExchangeRate	InvoiceDate	TaxRate	Comments	BaseCurrencyTotal	InvoiceStatusDesc	SalesmanName	ChNotes	CTotal
KZ2N000012	6005715519	Caime Oacsoft CC	Sales	Accounts	483.00	ZAR	1.00	17 May 2024	15.00		483.00	Printed	Eden Rowan		
KZ2N000013	6005715519	Caime Oacsoft CC	Sales	Accounts	17,589.48	ZAR	1.00	21 May 2024	15.00	PR Issue Item Delete	17,589.48	Printed	Eden Rowan		
KZ2N000015	6005715519	Caime Oacsoft CC	Sales	OTC Part Request	14,490.00	ZAR	1.00	16 Jul 2024	15.00		14,490.00	Printed	Eden Rowan		
KZ2N000015	6024994308	Realnix Ducarme Sec.	Sales	Sales Invoice PR	2,415.00	ZAR	1.00	17 Jul 2024	15.00		2,415.00	Printed	Eden Rowan		
KZ2N000016	6005715519	Caime Oacsoft CC	Sales	OTC PR 1320 14	6,624.00	ZAR	1.00	17 Jul 2024	15.00		6,624.00	Printed	Eden Rowan		
KZ2N000017	6005715519	Caime Oacsoft CC	Sales	SalesInvoiceOTC	1,240.62	ZAR	1.00	17 Jul 2024	15.00		1,240.62	Printed	Eden Rowan		
KZ2N000018	6005715519	Caime Oacsoft CC	Sales	MNU0320 14 OTC Is.	483.00	ZAR	1.00	17 Jul 2024	15.00		483.00	Printed	Eden Rowan		
KZ2N000019	6050183105	Barker Wraight Security	Sales	OTC Part Request	8,556.00	ZAR	1.00	18 Jul 2024	15.00		8,556.00	Printed	Eden Rowan		
KZ2N000020	6050183105	Barker Wraight Security	Sales	MNU0320 10 Picking	14,003.70	ZAR	1.00	18 Jul 2024	15.00		14,003.70	Printed	Eden Rowan		
KZ2N000022	6085742234	Form Fair Publishing	Sales	MNU.063.007	6,222.63	ZAR	1.00	30 Jul 2024	15.00	Quotation MNU.063.007 - Email	6,222.63	Printed	Eden Rowan		
KZ2N000023	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	31 Jul 2024	15.00	POS Lite MNU.068001	4,830.00	Printed	Eden Rowan		
KZ2N000025	6075468708	MIRA Buhill CC	Sales		10,488.00	ZAR	1.00	31 Jul 2024	15.00	Invoice068001	10,488.00	Printed	Brightie B		
KZ2N000028	6075468708	MIRA Buhill CC	Sales	Email Invoice	6,210.00	ZAR	1.00	31 Jul 2024	15.00	MIRA PS Lite Email	6,210.00	Printed	Eden Rowan		
KZ2N000030	6085742234	Form Fair Publishing	Sales	Emailing MNU.063.007	5,047.35	ZAR	1.00	31 Jul 2024	15.00	MNU.063.007	5,047.35	Printed	Eden Rowan		
KZ2N000033	6075468708	MIRA Buhill CC	Sales	Cancel Email	4,830.00	ZAR	1.00	31 Jul 2024	15.00	cancel email	4,830.00	Printed	Daman Holland		
KZ2N000035	6065001000	Sell Off Customer	Sales	Edit Invoice MNU	4,588.50	ZAR	1.00	03 Jun 2024	15.00	Customer PS Lite 068	4,588.50	Printed	Eden Rowan		
KZ2N000037	6065001001	Cash Sale Account	Sales		5,313.00	ZAR	1.00	31 Jul 2024	15.00	SP 2020 PSL	5,313.00	Printed	Eden Rowan		
KZ2N000041	6065001001	Cash Sale Account	Sales		4,830.00	ZAR	1.00	19 Apr 2024	15.00	CashSale068000	4,830.00	Printed	Eden Rowan		
KZ2N000042	6065001000	Sell Off Customer	Sales		4,830.00	ZAR	1.00	14 Jun 2024	15.00	CustomerPSL	4,830.00	Printed	Eden Rowan		
KZ2N000043	6060691152	Gardening Peckford Du.	Sales	MNU.063.007	4,830.00	ZAR	1.00	19 Jun 2024	15.00	Email Report	4,830.00	Printed	Eden Rowan		
KZ2N000048	6055476013	Winn Biale Systems	Sales	MNU.063.007	4,588.50	ZAR	1.00	25 Jun 2024	15.00	Print Email	4,588.50	Printed	Eden Rowan		
KZ2N000048	6075468708	MIRA Buhill CC	Sales	54321	5,934.00	ZAR	1.00	01 Aug 2024	15.00	Client will collect.	5,934.00	Printed	Eden Rowan		
KZ2N000049	6075468708	MIRA Buhill CC	Sales	MNU.063.007	4,830.00	ZAR	1.00	09 Aug 2024	15.00	Email	4,830.00	Printed	Eden Rowan		
KZ2N000049	6075468708	MIRA Buhill CC	Sales	MNU.063.002	4,830.00	ZAR	1.00	09 Aug 2024	15.00		4,830.00	Printed	Eden Rowan		

## 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](#)

MNU.063.007