Electronic invoices

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Updated: version 3.04

// mSupply// has a system that allows users to send electronic invoices to other users of // mSupply// .

Possible uses include:

- If you have a manufacturing unit and a separate warehouse, you can run two copies of mSupply and move stock from one location to another using electronic invoices.
- If you have customers using mSupply, they can import a 100 line invoice in a few seconds, where entering manually might take thirty minutes to an hour.

Setting up electronic invoices:

Supplier:

- In the Preferences of the copy of mSupply that is sending invoices, enter the supplier code that your customers will use for you.
- If your customer(s) have an email address and you want to send the electronic invoices via email, then enter their email address in the customer details window.

Customer

- For each item that will be received from a particular supplier, enter a quotation for the item. This is most easily done from the // quotes// tab of the supplier details window.
- For each quotation, enter the supplier code for that item. This means your own code for the item does not need to match the supplier code. (Note that you do not have to enter quotation prices for the electronic invoice system- just the item code).

Steps to use electronic invoices

1. Supplier creates an invoice
2. Supplier chooses // customer | export invoice// to create an invoice
3. Supplier sends the invoice to the customer (If the customer has an e-mail address entered, the invoice can be automatically attached to an email, or, the file produced can be attached to an e-mail using your normal e-mail client. Alternatively it may be transferred on removable medium (floppy, Zip, CD etc..)
4. Customer receives electronic invoice
5. Customer chooses // Supplier | import invoice// to import the invoice.
6. Customer checks the supplier invoice that is created against other documentation and against actual goods received.

Note:

- The invoice can still be edited after import
- The standard rules for calculating selling prices are used.
- If you want your suppliers to send you electronic invoices, persuade them to buy mSupply! Alternatively, we can supply the mSupply invoice format to their software vendor for inclusion in their own software.
- We recommend you perform a trial of the system on a backup data file before using in a production situation.

Previous: Backorders Next: Transferring goods to another Store

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Permanent link:
https://docs.msupply.org.nz/issuing_goods:electronic_invoices?rev=1417410310

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