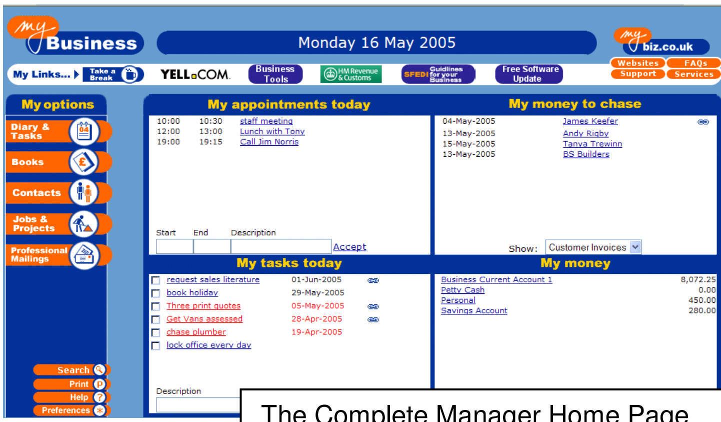
Using MyBusiness to Manage Invoices.

A Beginner's Guide



The Complete Manager Home Page

Efficient invoice management is very important to most businesses. To manage your cash flow properly you will need a system to let you know when invoices are overdue, and a system to ensure that you can quickly and easily raise reminders and follow up letters. A professionally produced invoice also says a lot about your company to your customers.

My Business makes managing your invoices easy. From raising a simple invoice to tracking overdue invoices, My Business can help to ensure that your business is run efficiently.

This guide highlights how you can use My Business for your invoicing. It will cover:

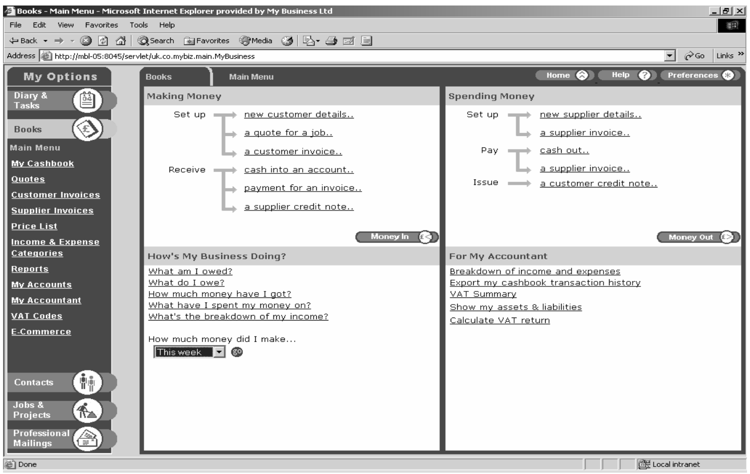
- Raising an invoice
- Printing an invoice
- Changing an invoice
- Tracking an overdue invoice
- Printing reminders

In most cases the examples demonstrate how to manage a customer invoice, but My Business will manage Supplier Invoices in the same way.

Tip: if you want to try out any of the suggestions below you can use the demonstration version of My Business that is installed along with the product.

Raising an invoice

Before you start, you will need some basic information about the invoice – who are you invoicing, what is the address, what is it for, how much is it for?



There are three ways in which you can raise an invoice which reflect the way you want to work:

- From the 'Accounts Main Page' – this is where you will find all of the individual bookkeeping features of Complete Manager. Go to Accounts Main Menu / Set Up a Customer Invoice
- From a quote – the information entered into the quote is carried through to the invoice. Go to a previous quote and select "Create an Invoice" at the bottom.
- From a contact – you can use the bookkeeping features through the contact management part of the product. Go to a Contact Details page and select "Create an Invoice" at the bottom.

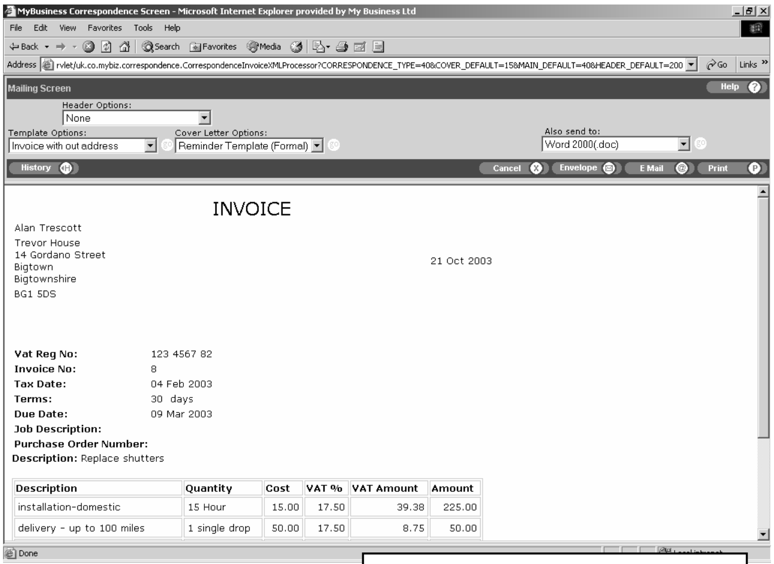
Tip: *although it is not necessary, it is a good idea to enter your contact details in first. This can be done from the accounts Home Page as well as through Contacts*

My Business will guide you through the process of raising an invoice using a process is broken down in an easy to follow process. At the end of these wizards you will reach an invoice summary screen where you can check the details and even add or amend details at any stage. Once you have the details entered you can now preview and print the invoice ready to send to your customer.

The Accounts Main Menu Page

Printing an invoice

My Business has a number of built in 'templates' that you can use to print your invoice with. While these may give you all you need, you can further 'customise' the template to suit your needs. This may include adding your own letterhead or your own design of invoice. Conveniently, when you preview the invoice, you can also choose to print an accompanying letter and envelope. All of the details are automatically provided for you. Since all of your invoice details are stored in the program, you can at any time recall the invoice and print further copies. Select an invoice / click on Preview at the bottom. If you are printing on your own letterhead and have your address on your letterhead select Header Options "None" and Template Options "Invoice without address" and click "Go".



The Invoice Preview Page

Changing an invoice

Changing the details of an invoice can be complex in traditional accounting products. In My Business, you can change any of the details simply by modifying the invoice at any stage - any changes you make are recorded. My Business maintains a 'log' of these changes that is accessible at any time and can be printed out. Go to Customer Invoices, select the invoice you want to amend and make any changes.

Tracking an overdue invoice and printing a reminder

My Business has a unique way of integrating your business data. This means that your diary and your contacts share the same data as your bookkeeping data. When an invoice becomes overdue, My Business automatically warns you that payment is due. In fact a 'link' to the invoice detail is provided for you on the 'Home Page' under "My Money to Chase". By clicking on the invoice on the Home Page, then clicking on Preview in the invoice summary page My Business will produce a Reminder Invoice and a Reminder letter!

Receiving payment for an invoice

My Business also provides you with a fast way to accept payments when you receive them! In Customer Invoices go to the invoice you wish to receive money for and select "Pay".

This guide is intended to help you get started when using My Business. If you have any questions or would like further advice please ring our Free Help line on 08451 20 30 40, Monday to Friday, 9:00 to 17:00. Or email support@mybiz.co.uk

The My Business Support Team will be happy to answer any of your questions.