# HerdMASTER 4 Tip Sheet
INVOICING

INVOICING OPTIONS

The invoicing option tab is found in the **Setup |Site options** section of the program and allows you to set some predefined fields when generating invoices.

This tab allows you to enter information for the invoice generator.

NEXT INVOICE NUMBER

Choose the number you wish to assign to the invoices your about to generate. Enter any number you wish.
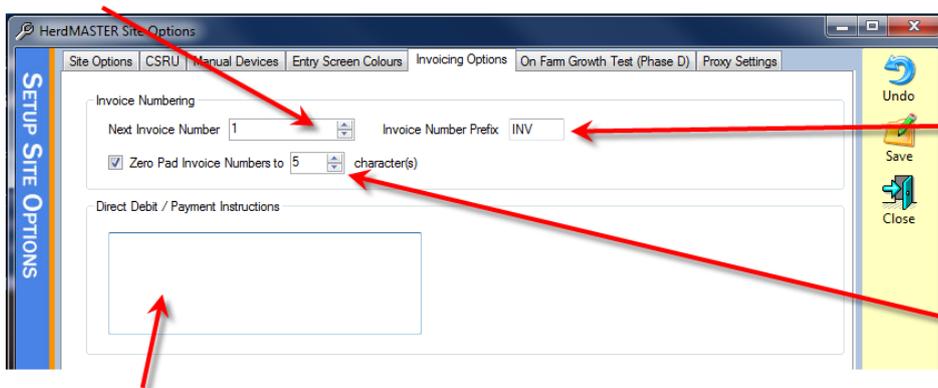
INVOICE NUMBER PREFIX

This assigns a number at the beginning of every invoice for your reference.

ZERO PAD INVOICE NUMBERS

This fills in invoice number characters with zeros, making the invoice numbers uniform.
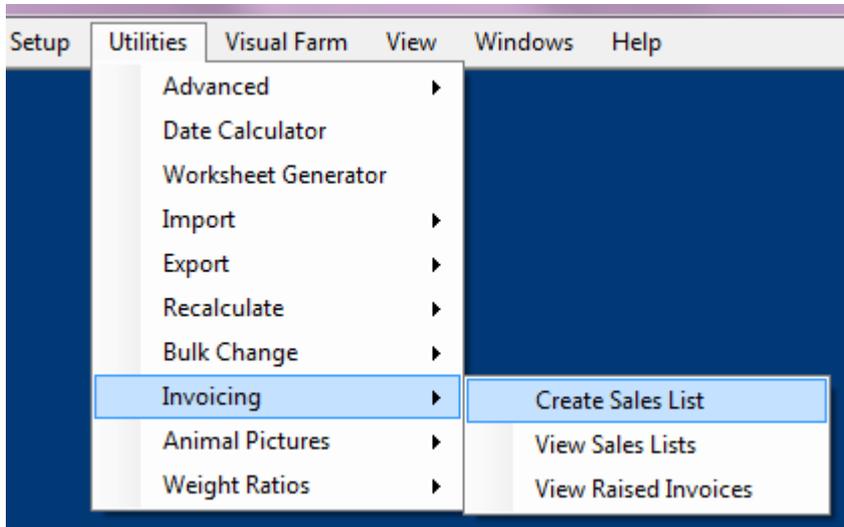
DIRECT DEBIT/PAYMENT INSTRUCTIONS

Use this field to type your bank account details or any instructions for your customers regarding payment. It will appear on the invoice.
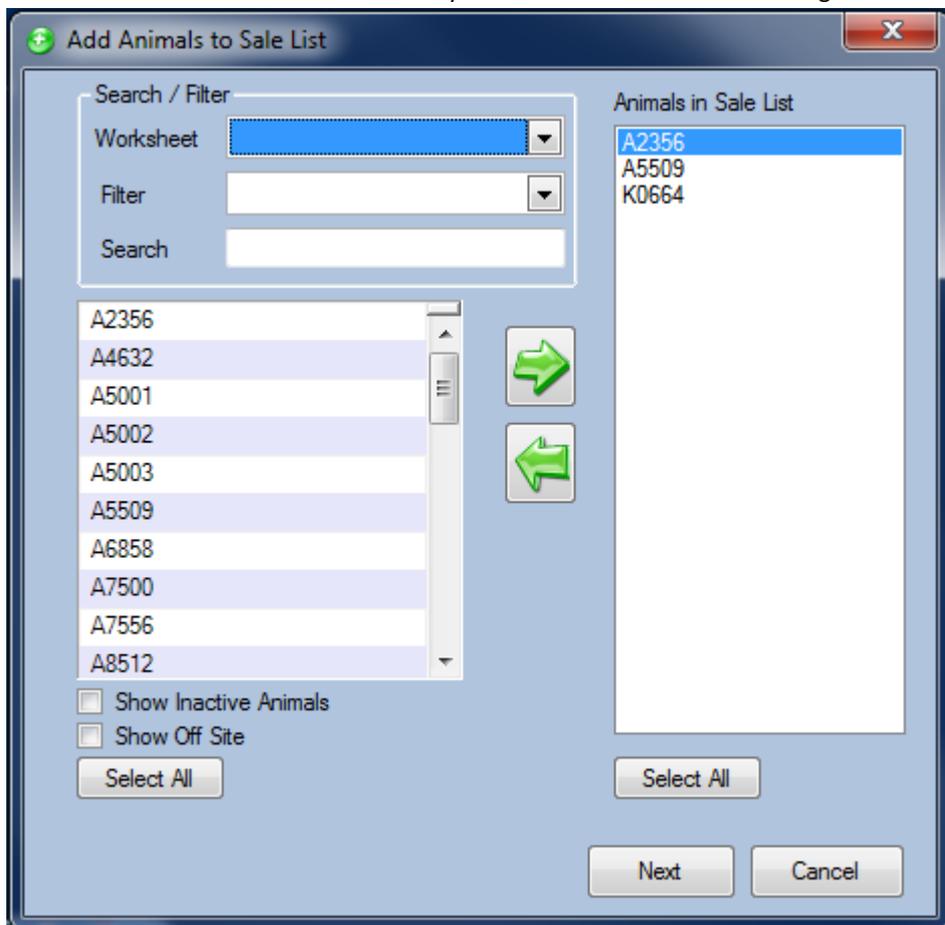
Once you have setup the default information in the site options you can start to add animals to an invoice.
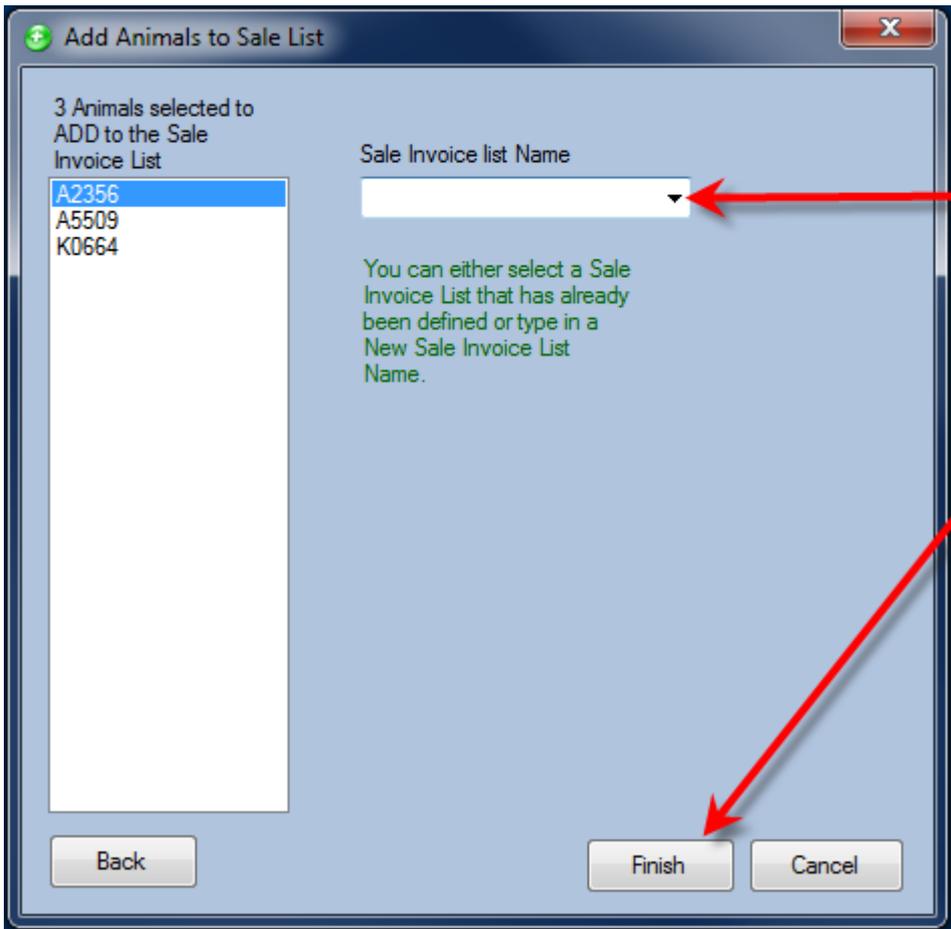
Select **Utilities | Invoicing | Create Sale List**.

1. You will now be able to select the animals you want to add to the sale list to generate invoices for.

2. Select your animals and press Next.

3. Enter a name for this sale list you are about to create. This allows you to be able to go back and view or add to sales lists at a later stage.

4. Press Finish

Setting up the sale list is now complete

VIEWING SALE LISTS AND CREATING THE ACTUAL SALE

To view the sale list you have just created select **Utilities | Invoicing |View Sale Lists**.

You will be taken to a screen that you can record who you sold the animals to and what price you sold them for. You also have extra options that will allow you to automatically record a sale against these animals and you can automatically make the animals inactive and record a fate against them.
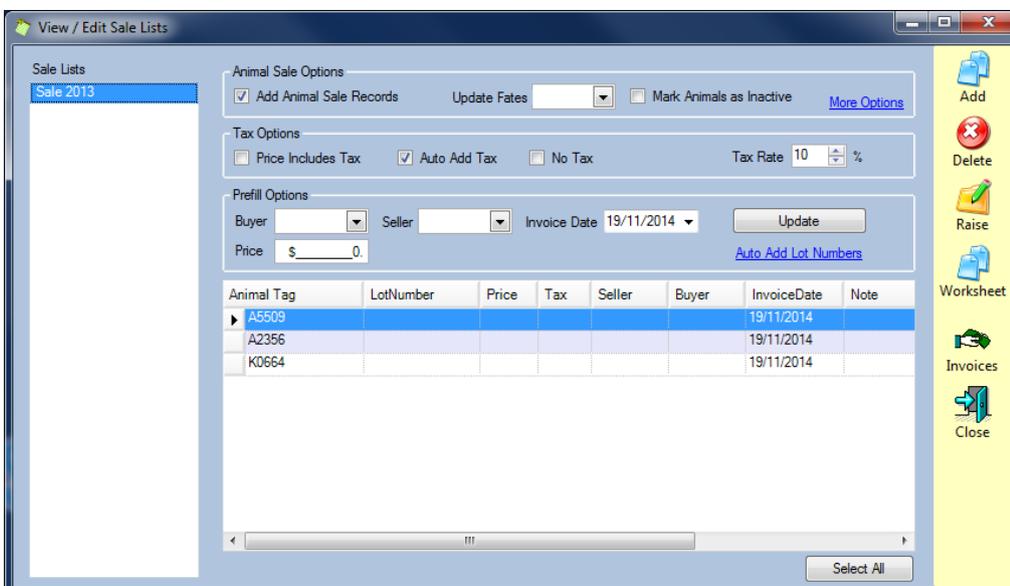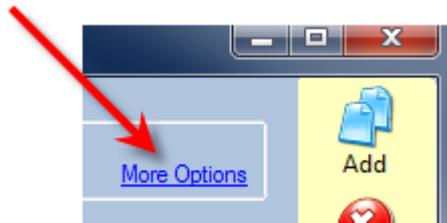

- To add more animals to this list press the add button.

- To delete animal from the list press the delete button.

- To add animals to a worksheet select the animals and then press the worksheet button.

If you click the More Options link then more of the sale options can be entered, such as transporter and whether payment has already been received.

CREATING THE INVOICE

To raise the invoice select all your animals on the Sale List and press the Raise button. Raise This will generate an invoice for you for the amount to you specified and to who you have specified.

Once you have raised an invoice you can press the invoice button to view it and any other Invoices you have raised previously or you can select **Utilities | Invoicing | View Raised Invoices.**

You will now to taken to a screen similar to below.

To view and print the invoice press the Print Button. And you will get an invoice formatted as below. The circled area shows your own contact details as entered into contacts (as you can see I am using dummy details in my OWNER contact)

		Tax Invoice
		Date: 19/11/2014
		Invoice No: INV00001
		Page 1 of 1

BLAH

Phone:
Fax:
Email:

Invoice For:

Saltbush Software
C/O ABRI
Armidale NSW 2350
Australia

Lot No	AnimalTag	Prefix	GST	Price	Total Inc GST
1	A5509	BOB THE BUILDER	$2,500.00	$25,000.00	$27,500.00
2	A2356	TONKA	$2,500.00	$25,000.00	$27,500.00
3	K0664	K664	$200.00	$2,000.00	$2,200.00
				Total excl GST	$52,000.00
				Total GST	$5,200.00
				Total Due Inc GST	$57,200.00

- To revert/undo this invoice press the revert button.

- To delete an invoice press the delete button.

!! IMPORTANT NOTE !!

It is not recommended to delete any invoices you have sent to customers unless it is either very old or the sale never proceeded further.