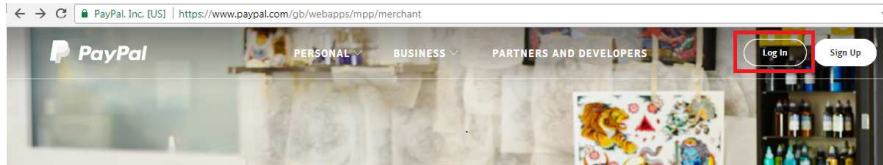
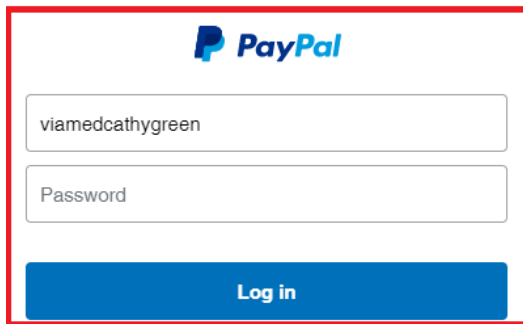


VM3COP20.55 - Sending PayPal Invoices to Customers

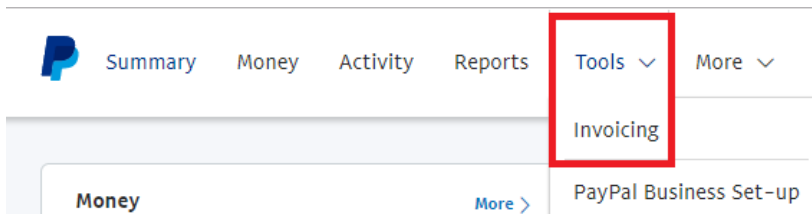
1. Before you start a PayPal invoice you must export/PDF the proforma and add to U:/operdocs.



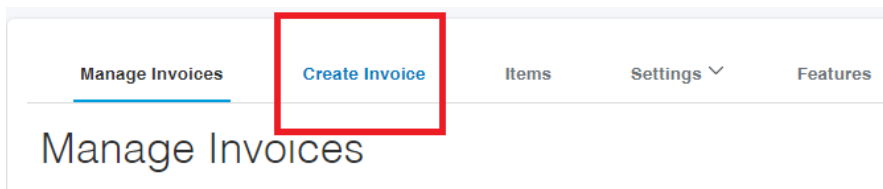
2. Go to the PayPal home page (www.paypal.com/uk/signin) and press the log in button. Log in using the details that you will get from an office colleague.



3. Click on to the 'Tools' drop down menu by pressing the down arrow and click 'Invoicing'.



4. Next, click 'Create Invoice'.



5. After you have clicked 'Create Invoice' a page will appear that looks like this:

Manage Invoices **Create Invoice** Items Settings Features Invoicing feedback

Create Invoice Preview Send Save as draft

My templates Viamed Paypal (default)

VIAMED

Your Business Information

Invoice number PRO04452

Invoice date 01/08/2017

Reference Such as PO #

Due date Due on receipt

Bill to: Email address or name + Bill multiple customers

Cc: Email addresses

'My templates' must always be set at Viamed PayPal (default).

Manage Invoices **Create Invoice** Items

Create Invoice

My templates Viamed Paypal (default)

VIAMED

6. The proforma number must be entered as the invoice number as shown in the picture below. You can find the proforma number on the top right of the proforma, starting with PRO.

Manage Invoices **Create Invoice** Items Settings Features Invoicing feedback

Create Invoice Preview Send Save as draft

My templates Viamed Paypal (default)

VIAMED Update Remove No file chosen

Your Business Information

Invoice number PRO04452

Invoice date 04/08/2017


Reference Such as PO #


Due date Due on receipt

7. Enter the 'Reference' number. This is the customer reference, which you will also find on the top right of the proforma. This should be the PO number. If there is not a PO number, it should be PP followed by the date. The due date is always 'Due on receipt'.

Create Invoice Preview Send Save as draft

My templates Viamed Paypal (default)

 **VIAMED**

 Your Business Information

Invoice number PRO04452 ⓘ

Invoice date 04/08/2017 ⓘ


Reference Such as PO #


Due date Due on receipt ▼

8. The customer's email is then put into the 'Bill to' box and your own email goes into the 'Cc' box. This is so that you will also receive a copy of the invoice. Always check 'Your Business Information' is Viamed's address.

Create Invoice Preview Send Save as draft

My templates Viamed Paypal (default)

 **VIAMED**

 Your Business Information

Invoice number PRO04452 ⓘ

Invoice date 04/08/2017 ⓘ

Reference Such as PO #

Due date Due on receipt ▼


Bill to: Email address or name ⓘ + Bill multiple customers ⓘ

Cc: Email addresses

9. Next, you need to copy the products/items that are on the proforma word for word including entering the correct quantities. The description must match the Opera description.

Invoice Address		Delivery Address		Proforma No. PRO04562		
Medical Corp SRL		Medical Corp SRL		Date 11/08/17		
550165 Sibiu		550165 Sibiu		Customer Ref. ZT11082017		
Str. Ghe. Lazar nr. 8		Str. Ghe. Lazar nr. 8		Account Ref. 00006176		
Romania		Romania				
550165		550165				
This Proforma is Priced in Euros						
PRODUCT CODE	DESCRIPTION	UNIT	QUANTITY	UNIT PRICE	DISC. %	TOTAL
0110433	Oxygen sensor, MAX-250K connector.	1	10	62.00		620.00
	S/N:					
INS	Insurance		1	6.20		6.20
PPUPS6	Courier delivery - Standard.		1	20.81		20.81

10. Always leave the postage box blank, as the carriage will be shown on an extra line on the invoice as shown below.

Subtotal			€647.01
Discount	<input type="text" value="0"/>	% 	€0.00
Postage	<input type="text"/>		€0.00
Total			€647.01 EUR

Description	Quantity	Price	Amount
0110433 Oxygen sensor, MAX-250K	10	€62.00	€620.00
INS Insurance	1	€6.20	€6.20
PPUPS6 Courier delivery - Standard	1	€20.81	€20.81
Subtotal			€647.01

11. The 'Terms and Conditions' will already be filled out for you but you will need to write " Thank you for your business" in the note to recipient box.

Note to recipient


Thank you for your business.

3972

Terms and Conditions


*This Item is procured from a non ISO 9000/BS 5750 source.
Vat Registration number : GB 287 389593
Terms: Nett 30 days from date of invoice. Full terms
www.viamed.co.uk/terms.htm
Full invoice amount to be credited to our account nett of all

3339

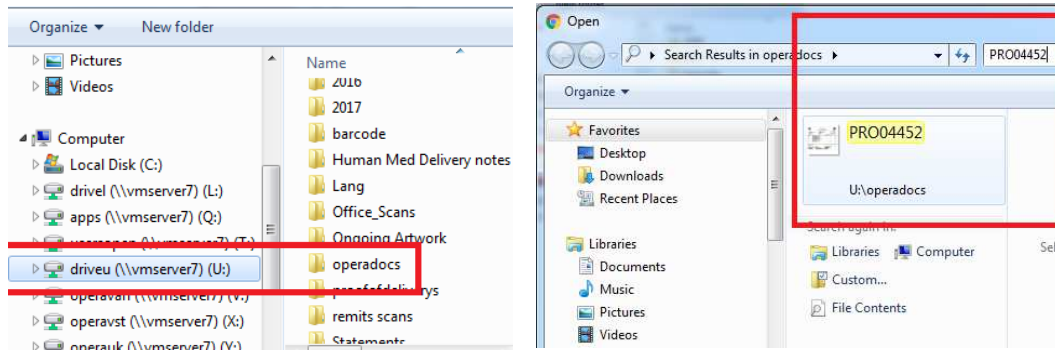
Attach files 

+ Add memo to self

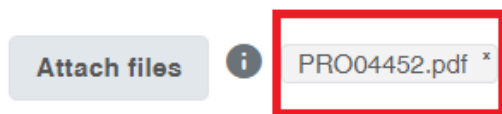
12. Next, you need to attach the proforma by pressing the 'Attach files' button on the invoice. This will take you to the computer files. Navigate to U:\operadocs. Type the proforma number in the search bar and the file will appear. Double click on the file and it will upload.

Attach files 

+ Add memo to self



13. Once the file is uploaded, it will appear next to the 'Attach files' button on the invoice as shown below.



14. Double check your work to ensure all the information has been entered correctly. Click 'Save as draft' and ask a team member to check the invoice for you to make sure it is correct.

Note to recipient

Such as "Thank you for your business"

Terms and Conditions

"This Item is procured from a non ISO 9000/BS 5750 source.
Vat Registration number : GB 287 389593
Terms: Nett 30 days from date of invoice. Full terms
www.viamed.co.uk/terms.htm
Full invoice amount to be credited to our account nett of all

4000 3339

Attach files ⓘ

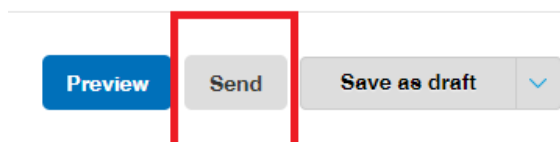
+ Add memo to self

It is the user's responsibility to create an invoice that is compliant with local laws and regulations, including, but not limited to, the application of the correct VAT rate(s)

Preview Send **Save as draft** ▼

15. Once it has been re-checked by a team member and is correct, it can now be sent to the customer by pressing the 'Send' button.

The proforma will be now sent to the Customer.



16. Check your emails to make sure your copy of the invoice has come through.

Print out a copy of the invoice. This needs to be attached to the proforma paperwork and put into the proforma file as per VM3COP20.28