

VM3COP20.061 - Sending Invoices Via E-Mail and Post

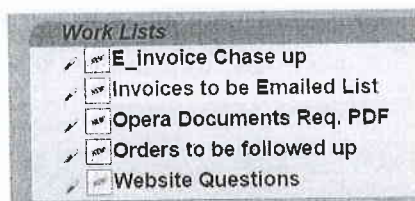
Sending Invoices via Email – Green Lines

Invoices can be located in "Tray 2 – Invoices to be posted/emailed" located in the office. Collect the pile invoices from this tray before proceeding.

Intrastats – Click



HL
ok'ed
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Click "Invoices to be Emailed List" in the Work Lists

KEY
No Invoice PDF in the System
PDF in the System Ready to send
Send Email from Goldmine with Invoices attached
Invoice to be Posted
Uses a Special system for Invoices See account notes

Note: Utilise the key to send the invoices via the correct method.

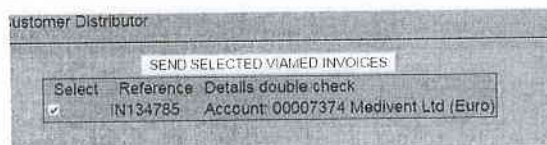
Red lines in the list indicate the Invoice has not yet been PDF'ed or the system has not yet indexed the invoice ready for emailing. This is an automatic process that occurs once per day.

INV Date	INV	ORD	Contact	Company	Email	Send	Remove
29 Mar 2017	IN150028	ORD85581	Marion Bean	West Suffolk Hospital	Send Invoices	invoices@wsh.nhs.uk	Invoice Sent by other means Invoice Not Sent
29 Mar 2017	IN150027	ORD85579		Wirral University Teaching	Send Invoices	win-trapinvoices@nhs.net	Invoice Sent by other means Invoice Not Sent

Click the invoice number, a second window will open displaying a PDF of the invoice.

Check the invoice number inside the PDF matches the invoice number on the screen and locate the correct paper copy of the invoice. Check the company/hospital name matches, Check that the invoice has a value, occasionally Opera misses the value and it has to be added manually (we do not send invoices that are zero value) and check if there are any memos on the body of the invoice telling you not to send the invoice, this may be due to an internal error.

If an incorrect invoice is located and has to be re-PDF'ed it may take up to an hour before the system move the new, correct PDF into the correct place for emailing.



Assuming everything is correct, click "Send Invoices". You can send one at a time or all together but when sending altogether you will need to check all the invoices first.

You will be presented with a final confirmation screen to send the invoices.

Click "SEND SELECTED INVOICES" to email the invoices. You will then be returned to the "Invoices to be Emailed List".

Strike through the paper copy of the invoice and proceed to send all invoices on green lines. When all green lines are complete, place the paper copies of the invoices in Helen's mail tray

All invoices with an attached credit card slip **MUST** be posted regardless of the line colour.