








RSA e-Business: Navigation

How to create an invoice: Summary

1. From the main menu click on the tab **Invoices**.
2. Under **Transactions** group, click on the link **Invoices ...New** link. This will open a new window.
3. Enter **customer number** or select it from the database by clicking on the button .
4. Click the **Products link** on the tab menu.
5. Use the tab key or click inside a field to change a default value.
6. Click on the Add product button  on the bottom of the window.
7. Enter or select a product number with the **Select** button  on the right side of the product field. When this is done properly, the customer information will appear on the screen will default values.
8. Change the default values (shipped, selling price) if necessary.
9. Click on the **Save** button  to add the product to the transaction. This will add the product information to the bottom side of the window.
10. To add more products on the transaction, click on the button  and repeat the steps 5, 6 and 7.
11. When you are done, save the transaction by doing the following:
 - i. Go to the bottom side of the screen
 - ii. Click on **Save** button .
 - iii. Click **again** on the **Save** button  for a confirmation.
 - iv. The created invoice number should be display on the screen.

How to create an Invoice: details

1. Select the **Invoice** tab. This will shows the menu navigation of the invoice.

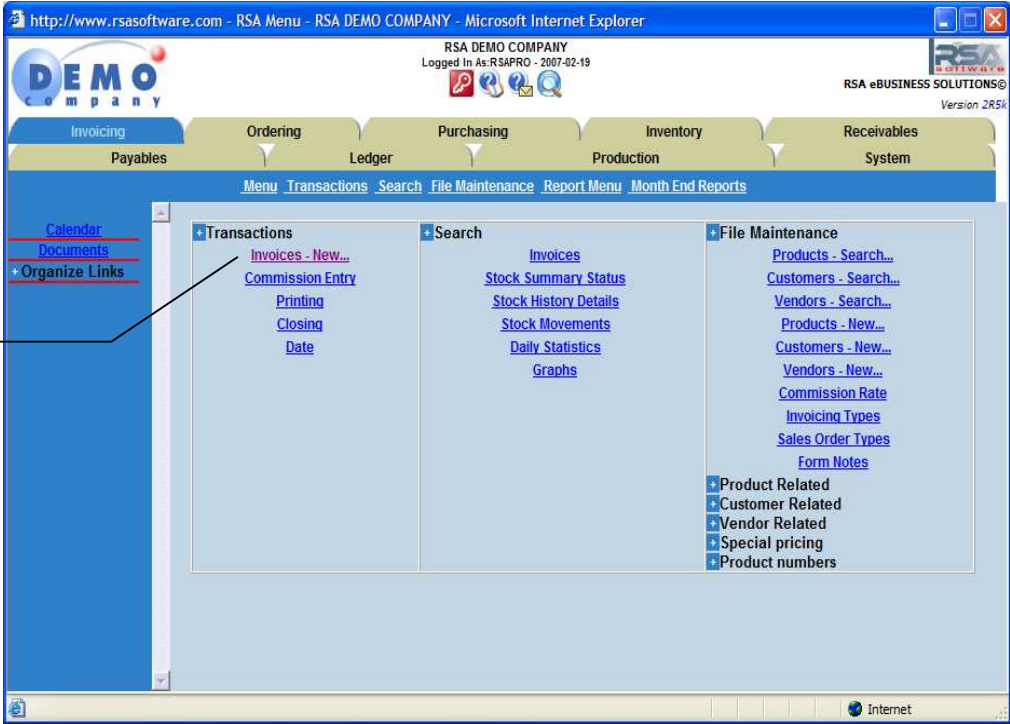


Fig 1: Invoice menu

2. Under **Transactions** group, click on **New Invoice**. This will open a new window like the one below.

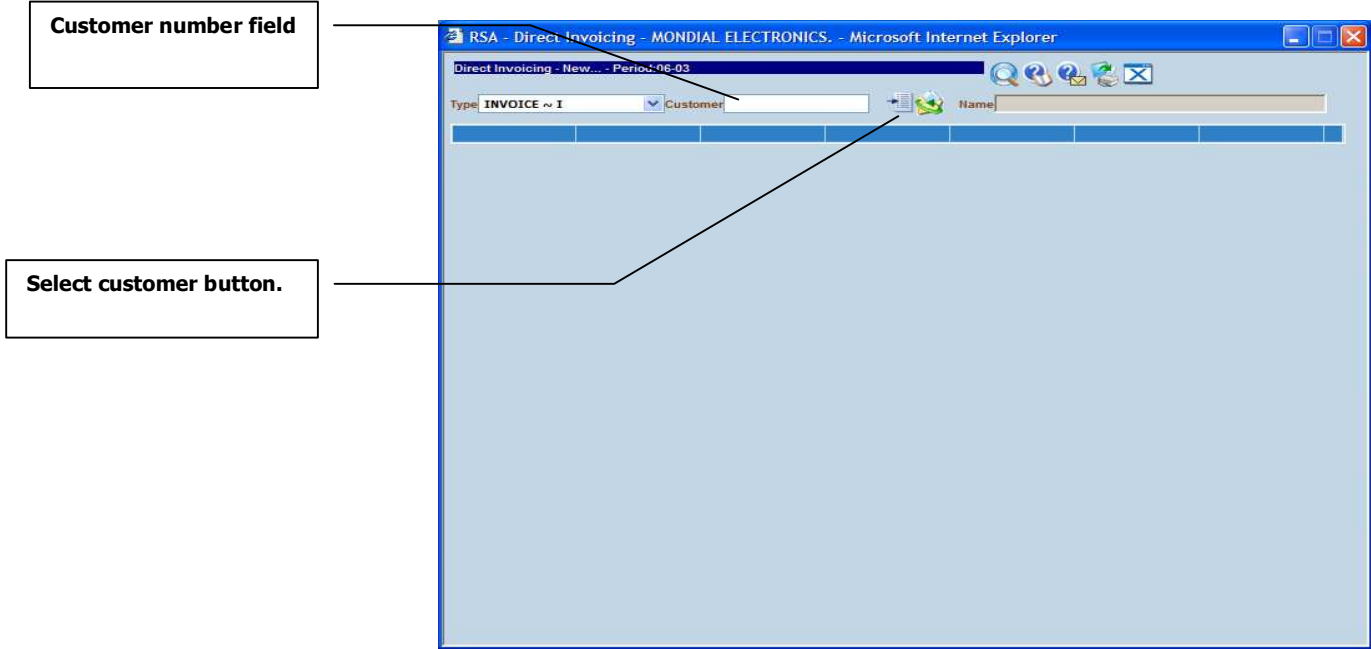



Fig 3: Screen for creating the invoice

3. In the new window, enter the customer number using one of the following:
 - a. Enter the customer number directly if you know it and go to step 4.
 - b. Otherwise use the Select button  near the customer field for selecting a customer number from the database. A new window will be opened. There are two ways for searching a customer number:

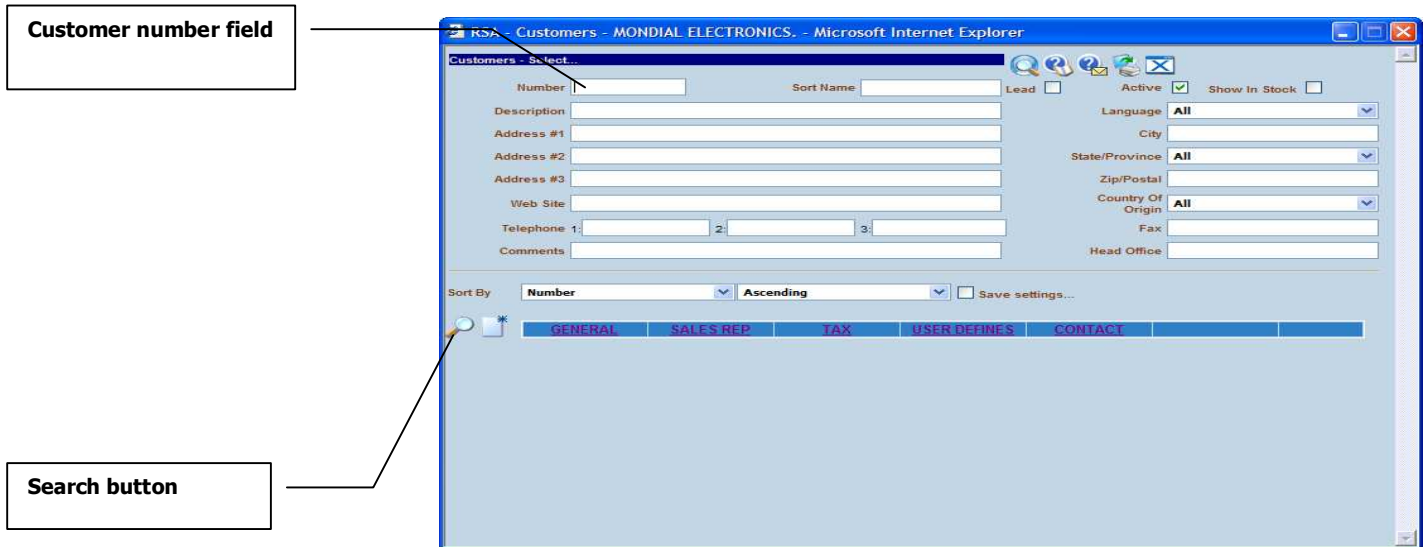




Fig 4: Screen for searching a customer by criteria

1. Searching a customer number by criteria:

- a. Enter the keywords in one or any fields you want. The keywords can be either one or any combination of either a word, a character, a wildcard like % character.
- b. Optionally use the sorting options for the result display
- c. Once the criteria are defined, click on the tab key or the Search button . This will bring a list of all available customers on the window (See fig 5 below).

2. Searching a customer number without any criteria:

- a. Click directly on the search button  without entering any criteria. This will bring a list of all available customers (See fig 5 below).
- c. A list of all available customers is displayed if any is found.

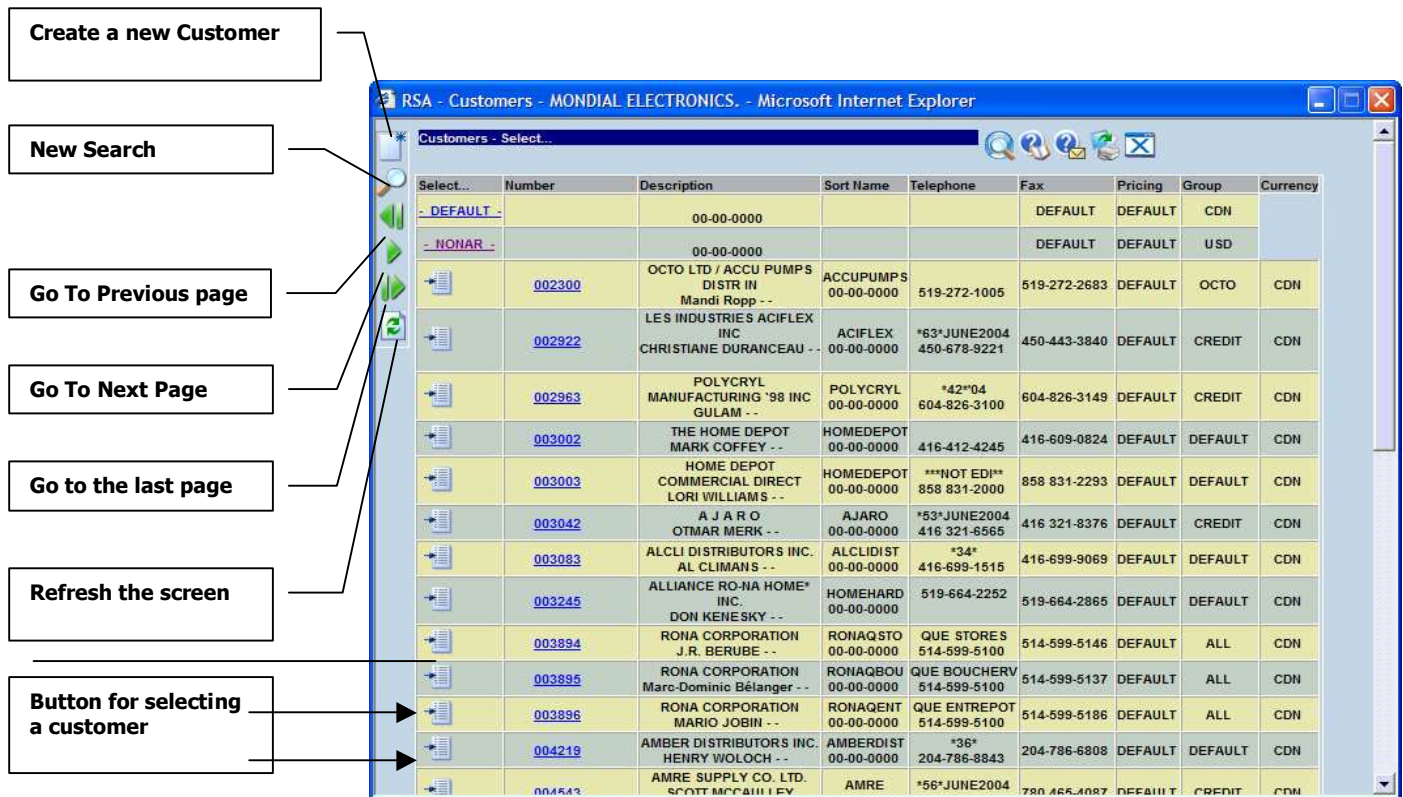


Fig 5: List of customers

d. Navigate through the list of customers and select the desired customer with select button under the column select.

4. Once a correct customer number is selected, the window changes and will let you gather all the other information regarding the new invoice (See fig 6 below).

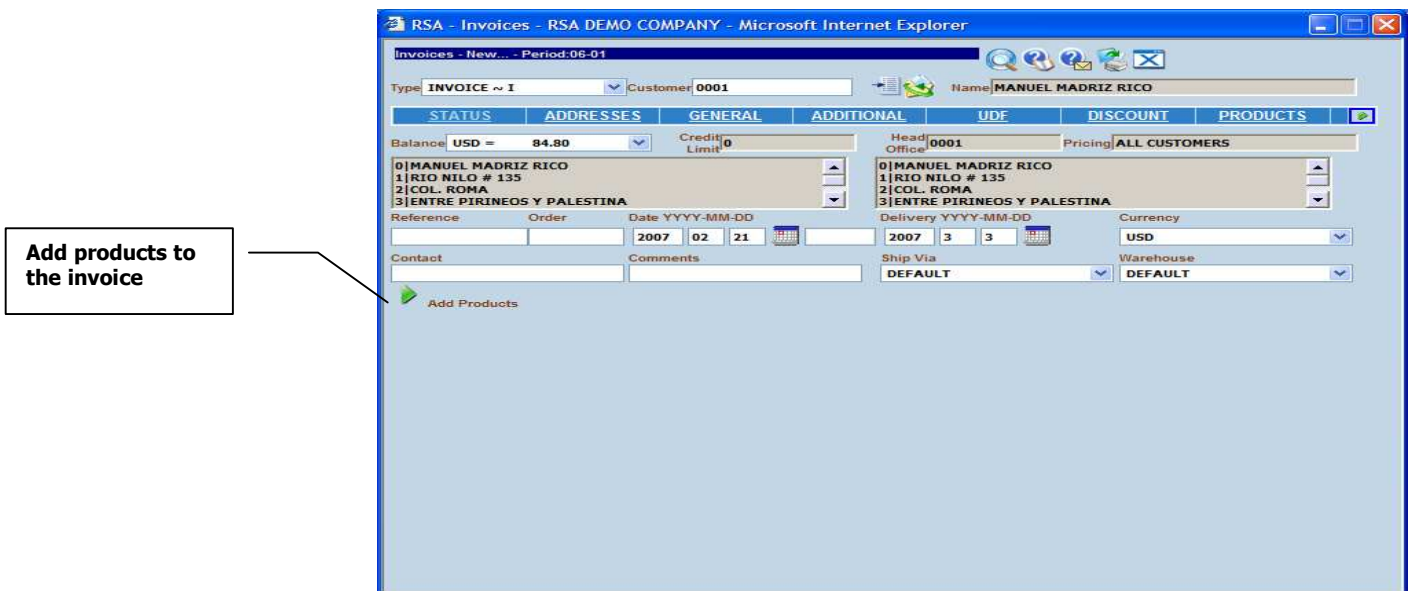




Fig 6: invoice window

5. Click on the **Add Products** button  or the **Products** link for adding products to the invoice.
6. Enter the product number in the required field. This can be done using one of the followings:
 - a. Type it directly in the dedicated input field if you know it.
 - b. Otherwise select a product by using select button  on the right side of the product number field.
7. Once the product number is selected, the following occurs:
 - a. The other fields of the window are filled in with their default values if any.
 - b. On the right side of the screen, appears a Save button

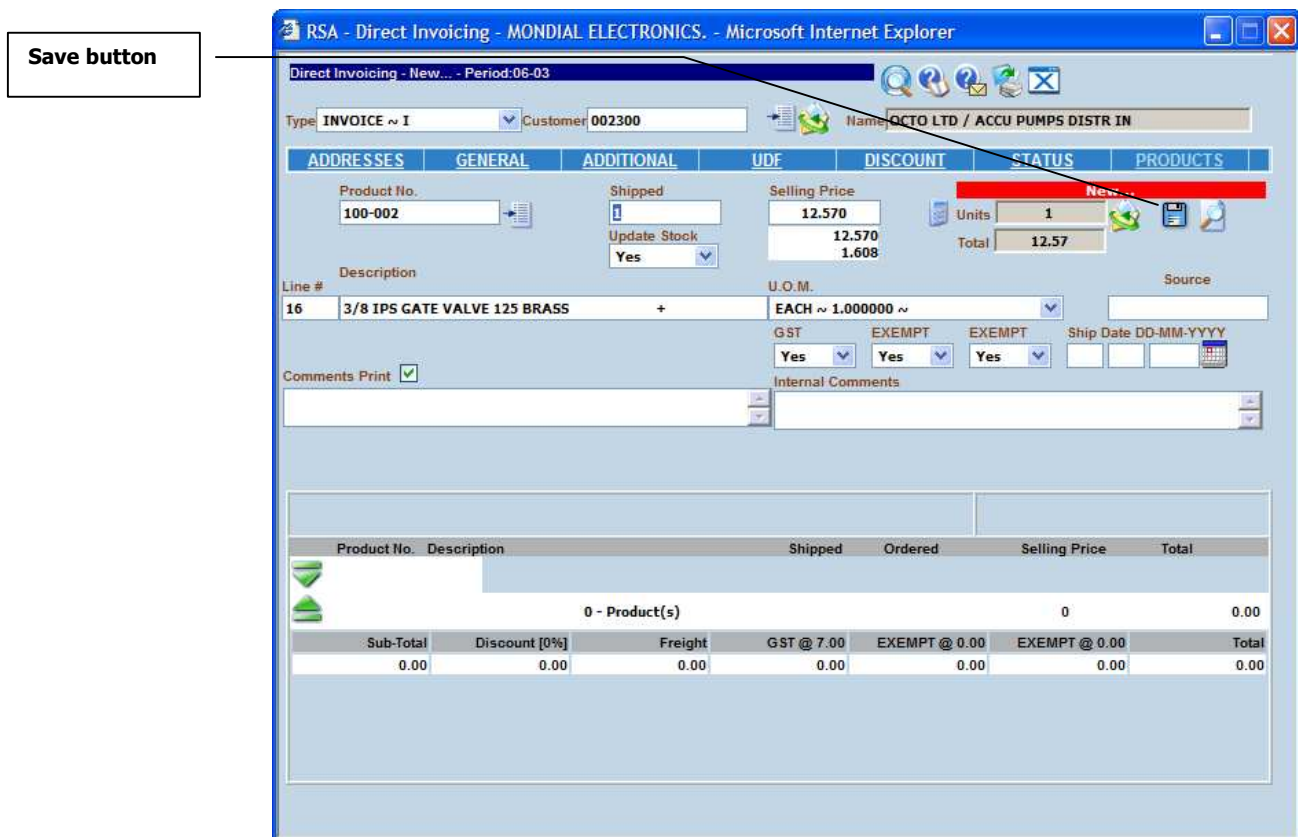



Fig 6: Screen status when a product number is filled in.

8. Use the tab key or click inside a field to change its value.
9. Click on the Save button  for adding the product to the invoice (See fig 7 below). It will appear on the bottom side of the window.

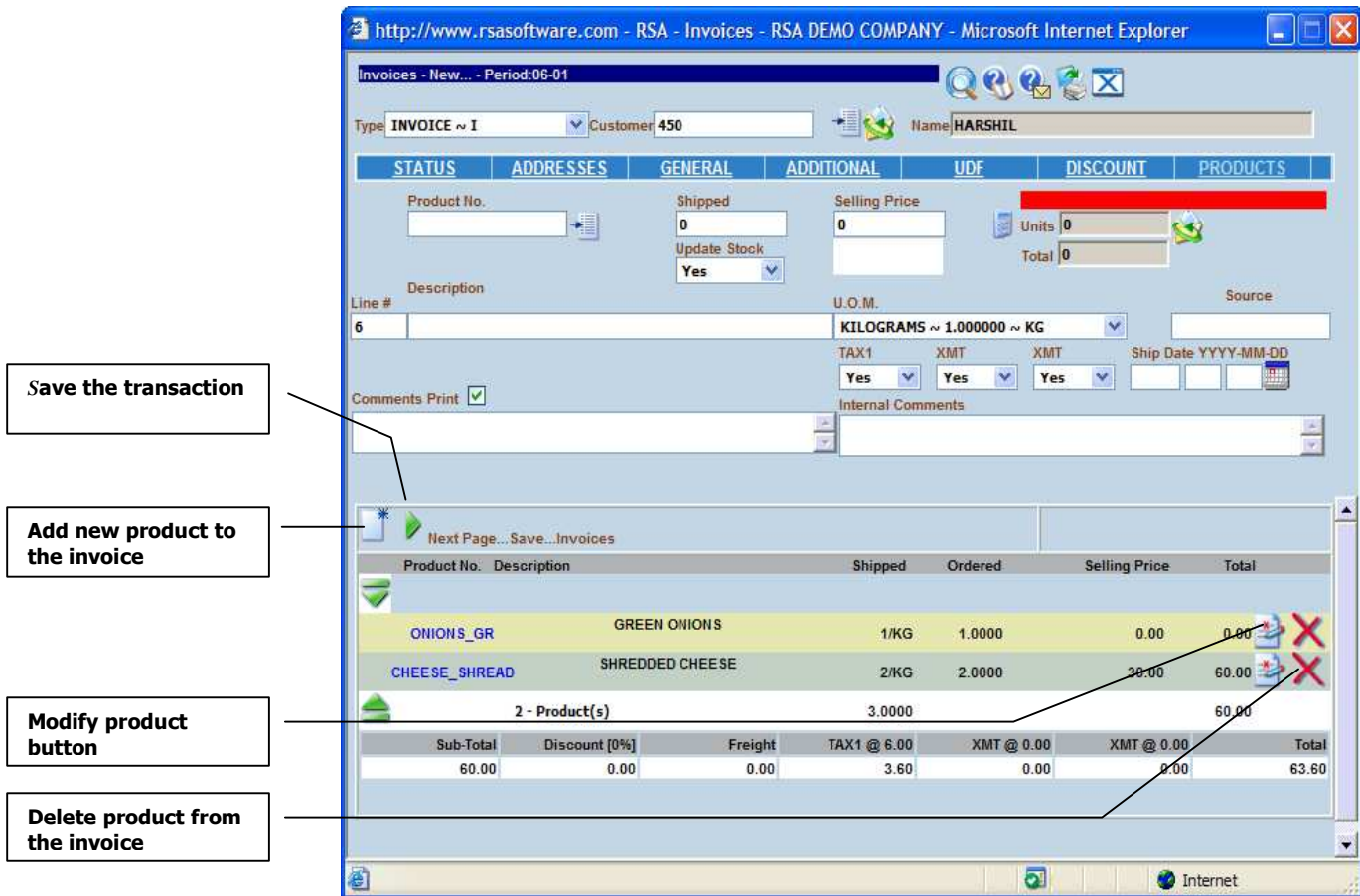




Fig 7: Adding products for the transaction

10. Repeat step 6, 7, 8, 9 if necessary for adding more products to the invoice.
11. When you are done, **Save** the transaction by following the following two steps:
 - a. Click on the Next button 
 - b. Click on the **Save** button  for saving permanently the transaction.
12. The invoice is created and the invoice number is displayed on the screen.