CERTIBOX

Manual - Pocket edition

BASIC

Creating and sending sales invoices

Forwarding sales invoices to Yuki

Receiving and verifying purchase invoices

Forwarding purchase invoices to Yuki

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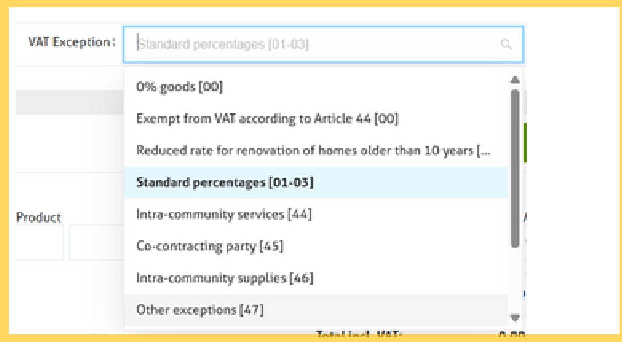
Attend one of our online webinars and get personal help from an expert!

Creating and sending sales invoices

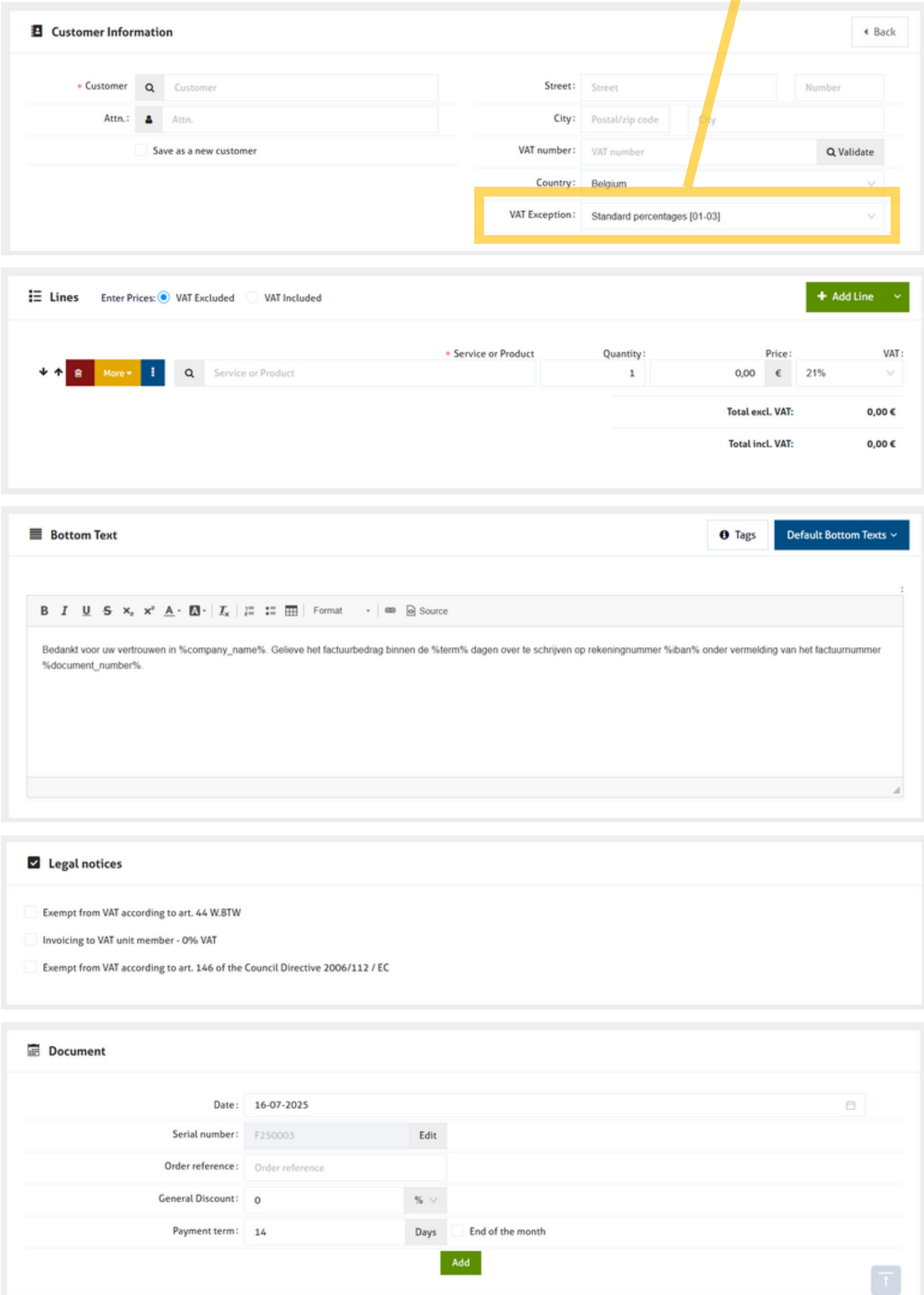
Step 1 Press ‘Sales’ in the left-hand menu

Step 2 Press ‘Invoices’

Step 3 Press the button ‘+ Create invoice’

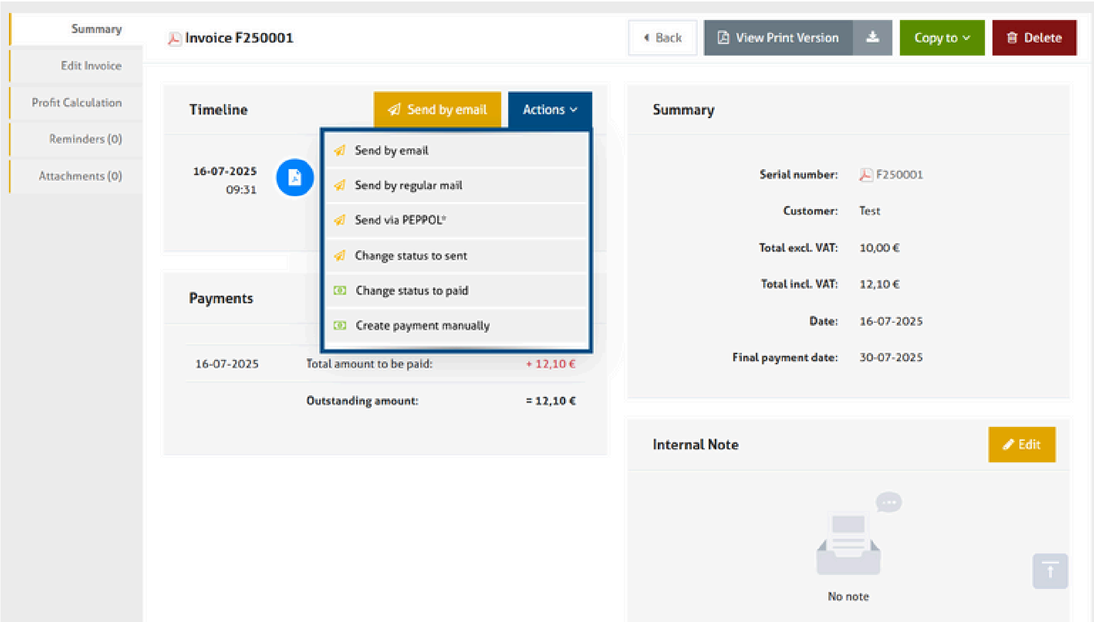


Step 4 Complete the input fields in order to create a sales invoice



Step 5 Tap on the green button ‘Add’

Step 6 Press the blue button ‘Actions’ and select the way you want to send the invoice

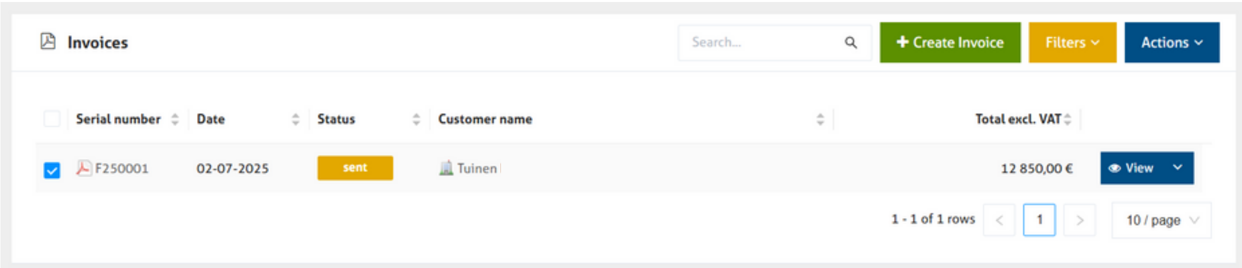


Forwarding sales invoices to Yuki

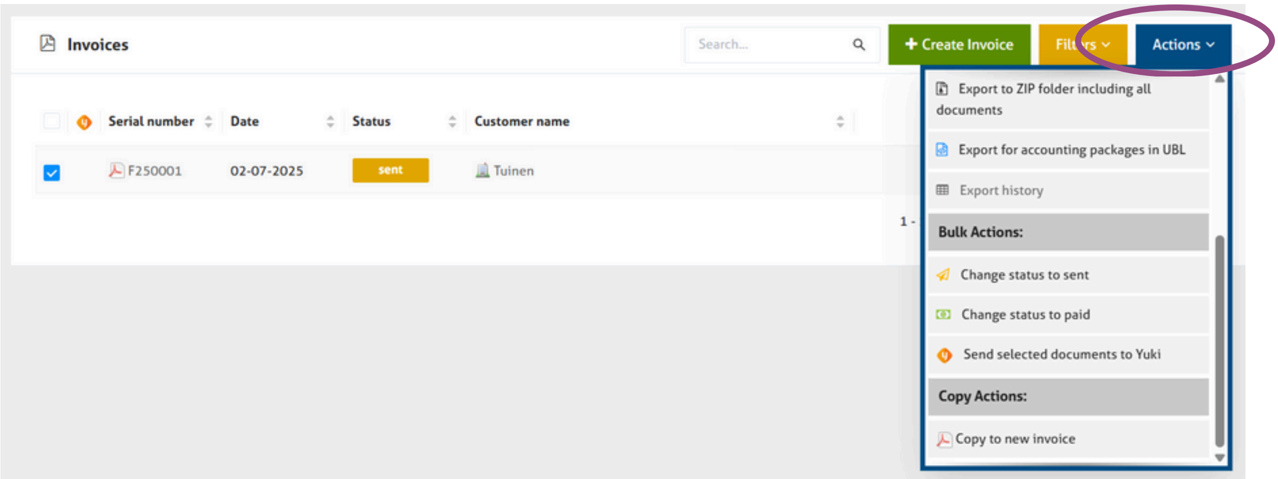
Step 1 Press ‘Sales’ in the left-hand menu

Step 2 Press ‘Invoices’

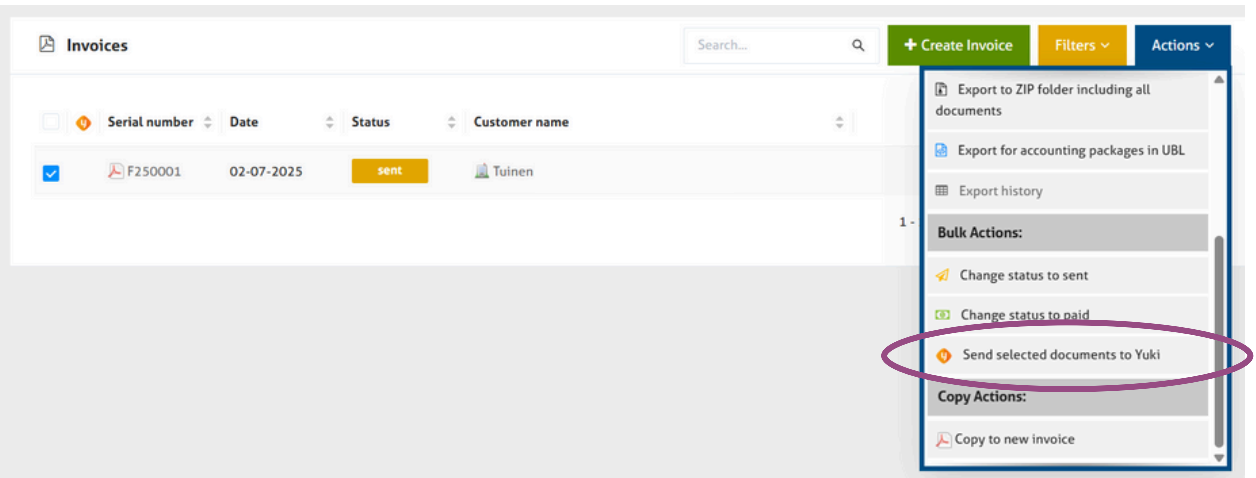
Step 3 Select the invoice that should be sended to ‘Yuki’



Step 4 Press the blue button ‘Actions’



Step 5 Select ‘Send selected documents to Yuki’



Step 6 If an orange Yuki icon shows up besides the invoice, the invoice has been sent succesfully

Receiving and verifying purchase invoices

Step 1 **Press ‘Purchases’ in the left-hand menu**

Step 2 **Press ‘To Be Processed’**

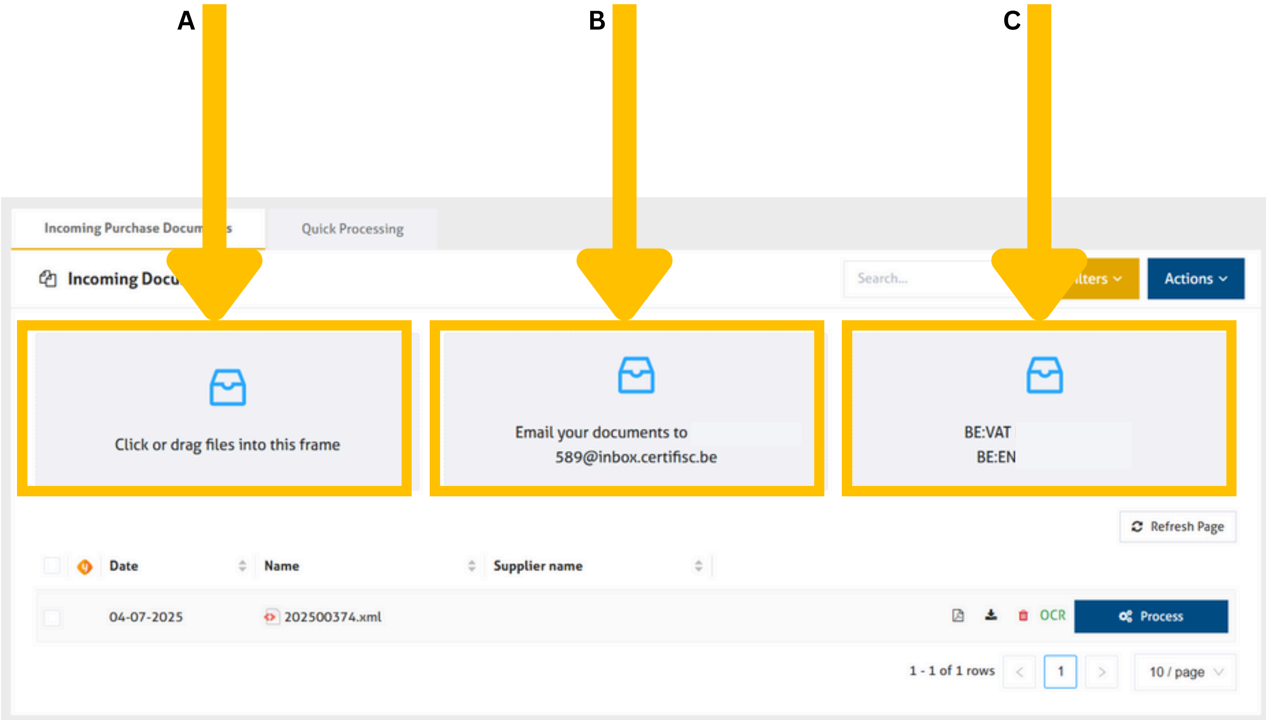
Step 3 **All your incoming purchase invoices will be centralised here**

There are **different channels** to get purchase documents here:

A. You can upload documents by clicking on the left-hand box

B. You can transfer documents by mail. Send your documents to the mail address showed within the second box

C. You can receive electronic invoices through Peppol if your suppliers are on the Peppol network



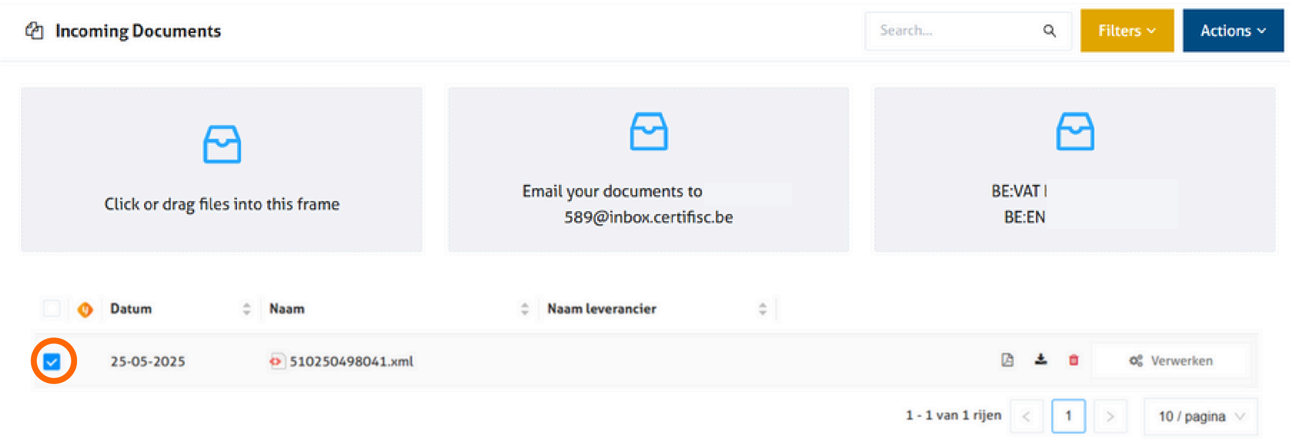
Step 4 **Press the indicated button to open the received invoice**

Forwarding purchase invoices to Yuki

Step 1 Press ‘Sales’ in the left-hand menu

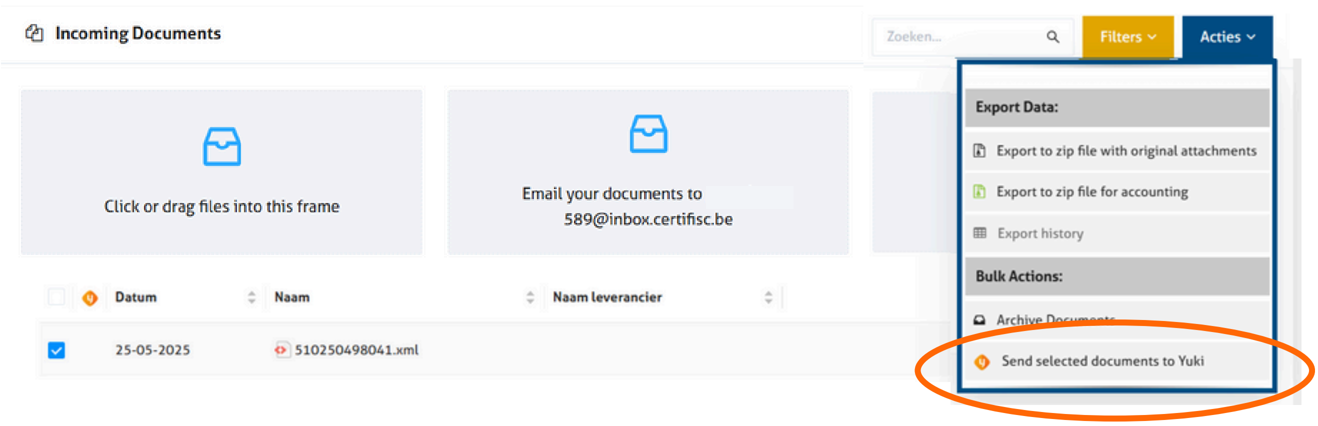
Step 2 Press ‘To Be Processed’

Step 3 Select the invoice that should be sended to ‘Yuki’

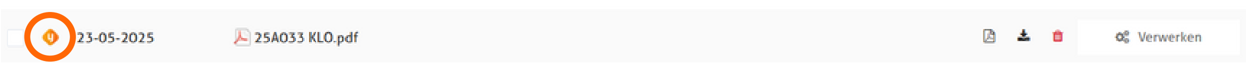


Step 4 Press the blue button ‘Actions’

Step 5 Select ‘Send selected documents to Yuki’



Step 6 If an orange Yuki icon shows up besides the invoice, the invoice has been sent succesfully



! Via the yellow button **Filters** you can tick the box ‘Archived’ . So you get an overview of all your invoices that were sent to Yuki