

Actions

Procedural Guide

Actions allow you to create invoices, requests, record payments, inventory, and record financial & managerial information.

1 - Choose Action

Under the navigation bar, go to Actions > to access the Actions List.

Invoice creates invoices, either from scratch or previous orders.

For more info, see the *Invoices Guide*.

Quickvoice uses Qlists to create an invoice quickly.

Customer Orders manages orders that are active, processing, or completed.

Inventory Transfers lets you create or request inventory transfers, or check transfer history.

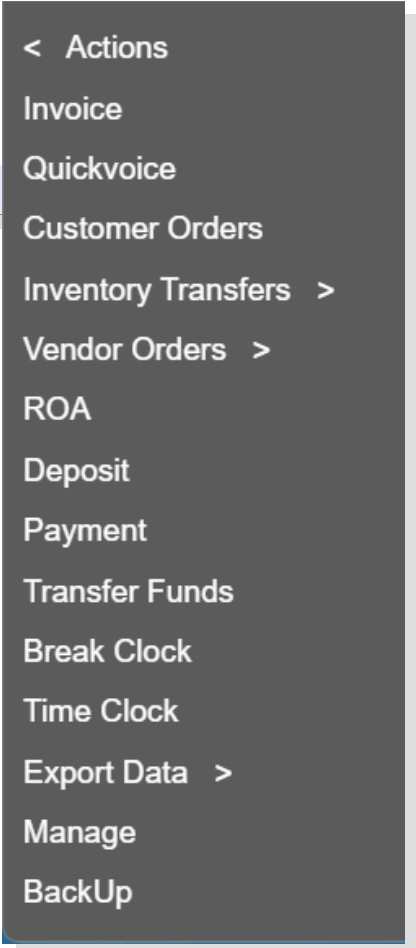
Vendor Orders is used to automatically or manually build orders to vendors, as well as receive or print.

ROA (Return on Assets) tracks outstanding invoice balances per customer, and records immediate payments for them.

Deposit records incoming funds to one of your accounts.

Payment records outgoing payments from your accounts.

Transfer Funds records money moved between your accounts.

A screenshot of a dark grey menu titled '< Actions'. The menu items are listed vertically: Invoice, Quickvoice, Customer Orders, Inventory Transfers >, Vendor Orders >, ROA, Deposit, Payment, Transfer Funds, Break Clock, Time Clock, Export Data >, Manage, and BackUp.

- < Actions
- Invoice
- Quickvoice
- Customer Orders
- Inventory Transfers >
- Vendor Orders >
- ROA
- Deposit
- Payment
- Transfer Funds
- Break Clock
- Time Clock
- Export Data >
- Manage
- BackUp

Break Clock – Unavailable at this time

Time Clock saves in and out punches for your personal shift. On your punch-outs, a printable summary will be created.

Export Data can export items from your database for use elsewhere in a .txt file or in InstaCart format.

Manage handles misc payouts.

BackUp creates a backup of your business's database with the information from the year and month(s) you specify.

- *Full BackUp* saves everything and can take a long time.
- *Lite BackUp* creates a faster backup without notes.

