

Accounts Receivable

This book covers how to use FlowAccount to quote, invoice, collect payments and issue receipts.

- [Quotations](#)
 - [Quotation Process](#)
- [Invoicing](#)
 - [Issue a full tax invoice with the FlowAccount accounting program](#)
- [Payments & Receipts](#)
 - [How to issue a receipt with FlowAccount](#)

Quotations

Quotation Process

Issue a quotation easily with FlowAccount

in the sales process Whether it is a product or service It starts with sending a quotation. You can issue a quotation in the FlowAccount accounting program, which helps design ready-made forms, by going to the sales document function. Then enter customer information Product or service details and price receive a quotation. Without having to type and create the form yourself in Excel As for the name and address of your own company, You can set it to default information at Blue menu bar on the left Then select the application and go to My Company

1.1.a Enter the "Quotation" menu, press the "button, create a new ". green in the upper right corner to create a document

FlowAccount Quotations

2.2.a Enter details in the fields specified by the accounting system, such as customer name, address, tax identification number. (You can choose what number of documents are issued in the name of the office or branch.) Product information, product prices, etc. for customer information. If it has already been filled in The system will automatically display a list of that customer and address

FlowAccount Quotations

3.2.a The date of issue of the document can be selected from the calendar (picture on the left) and the term is credited with indicating the date or not showing the date (picture on the right)

FlowAccount Ultimate Guide

FlowAccount Ultimate Guide

4.2.a Fill in additional details to create a quotation for any customer. In what project?

5.2.a Choose the price of the product whether it includes taxes or does not include taxes

FlowAccount Quotations

6.2.a Fill in the details of the products to be offered. along with details of quantity, price per unit (can add rows of items In the case of having multiple products to bid on)

FlowAccount Quotations

7.2.a The price summary section shows the total amount. and can choose to specify discounts for customers Both in the form of amounts and percentages

FlowAccount Quotations

8.1 If the product is a type of service, such as hiring to design a system, hiring to make things, or providing various services. There must be a withholding tax deduction. You can choose the tax rate for the deduction as shown in the picture, such as 2%, 3%, etc

FlowAccount Quotations

After saving the document You will be able to choose to print documents or download documents. After creating the document, press Close Window. The system will display all the quotations that have already been created and show the status that is currently being processed. The status is Waiting for Action

Invoicing

Issue a full tax invoice with the FlowAccount accounting program

Issuing a full tax invoice is easy. Let's try to follow the steps

FlowAccount Invoices

1.1.a Fill in the company name, address, and tax identification number of the customer. Including contact name Telephone number and email (if not yet in the contact database The system will save the information and store it in the database. or if you already have the information, you can display it immediately)

FlowAccount Invoices

2.2.a Document number (the system will run it automatically)

3.2.a Document date: You can click to adjust according to the reference document

FlowAccount Invoices

4.2.a Product price: You can choose whether you want to use it with taxes. or excluding taxes

FlowAccount Invoices

5.2.a Specify the product list, quantity, and unit price. (If you already have product information in the system, you can choose to display it immediately.)

FlowAccount Invoices

6.2.a Product value and VAT value The system automatically calculates

That's it, you can easily create a full tax invoice. and has complete details as specified by the Revenue Department In addition, when pressing to record the tax invoice created from the system You can also choose to print documents. Download as a PDF file and send a copy to the customer via email. or share it as a file link for customers To facilitate customers Yes, with the appearance as shown in the picture

FlowAccount Invoices

Payments & Receipts

How to issue a receipt with FlowAccount

You can issue a receipt from Billing/Invoice (or the document header you set according to the type of business, such as a delivery note/invoice/tax invoice) that was previously issued in the FlowAccount accounting system immediately, without having to create documents and reprint information. Just follow this step

1.1.a Go to the bill/invoice list. who have already received the money Click to select the status of that document. You can create both original and copy receipt documents. that can be taken to customers when they receive money immediately

FlowAccount Receipts

2.2.a You can choose "to show date" or "not show date". on the receipt After checking that the information is correct, press "Save Document"

FlowAccount Receipts

3.2.a Save payment by going to the "button. Add receipt of payment ". Then a window will pop up as shown in the picture. Enter details of receiving payments from customers

FlowAccount Receipts

4.2.a Once completed, press the "Save" button to complete the sales process