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## How to search for an Invoice

### 1 From Click the Billing Menu and select 'Invoices'

### 2 Search for an Invoice via Filters

**Step 1** Select the Customer from the drop-down list

**Step 2** Click, Select or Enter the details in any of the filter boxes

**Step 3** Click Filter

**Step 4** Click on the Invoice ID Hyperlink for more details

### 3 Search for an Invoice via Page Search

**Step 1** Add the invoice details in the search box - located on left hand side under the thick blue line

**Step 2** Click the 'Search Icon' 

If you only have part of the invoice **Add an asterisk (\*)** before and after. This will only search the columns that are underlined when you hover over them.

### 4 Sort Invoice Data – Once you have your data

**Step 1** Click the column heading you want to sort (the arrow indicates if its ascending or descending)

**Step 2** Click the column heading again if you want to change the sort from ascending to descending

### 5 Download Tax Invoice

**Step 1** Click on the Invoice ID Hyperlink for more details

**Step 2** Click on PDF document under the Documents section to view the tax invoice

**Step 3** Print or Save PDF document to your local directory

### 6 Export Invoice Data

**Step 1** Click Export

**Step 2** Save Microsoft Excel report to local directly

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## Hints & tips

- Anywhere you see the wildcard pop-up box (shown right) with the message 'To search on partial text, use the asterisk (\*) wildcard character':
- Add an asterisk (\*) on either side to search for the character before and after the data. Add an asterisk (\*) after the number will only search data where other characters appear after the numbers only

