InTouch now integrated with KashFlow

InTouch is now integrated with the Kashflow accountancy package to allow you to create invoiced using your customer database help within InTouch.

What is Kashflow and how does it integrate with InTouch?

Kashflow allows you to keep track of quotes right the way through to sales. Allowing you to synchronise accounts from InTouch and seamlessly follow through with your everyday billing process.

How to integrate your InTouch account with Kashflow:

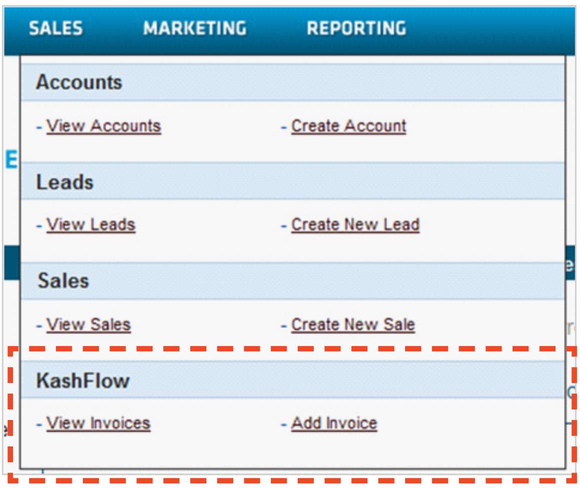
1. **You first need a Kashflow account which can be set up via the Kashflow website (www.kashflow.com)**
2. **Log in to your KashFlow account and navigate to "Settings -> API Settings".**
3. **Check the box "Enable the API for my KashFlow account" and uncheck the box "Only allow specific IP addresses to access my account via the API".**
4. **Save the updates.**

How to start using Kashflow and InTouch:

You can now synchronise up your accounts from Kashflow to InTouch.

Once logged into InTouch you can find the Kashflow options within the Sales dropdown.

You will have a whole new tab which will be for Kashflow.



Customers Really Matter Ltd. Registered Office: Ebdon House, 89 Ebdon Road, Weston-super-Mare, BS22 6US
Tel: 0845 310 9973 | Fax: 0845 280 2089 | e-mail: info@intouchcrm.co.uk

Creating Invoices within InTouch using Kashflow:

Invoices

Add Invoice

Inv #	Customer	Date	Amount	Status
3810	Test	10/06/2009	£6,900.00	Paid
3809	Test	02/12/2008	£17.99	Paid
		Total:	£6,917.99	

You can create an invoice for your accounts by simply selecting the account (by clicking the Inv#) and then following the easy to use, step by step process:

Click on the "Add Invoice" option within the Sales drop down. This will then bring up the panel below which allows you to select the account that you want to generate the invoice for. The accounts are pulled from the accounts section within the InTouch system.

Invoices > Add Invoice

Customer	Imported from V5
Purchase Order	
Invoice Date	11/06/2009
Invoice is Due on	09/07/2009

Create Invoice | Cancel

From this panel you can select the date that the invoice is for as well as setting a due date depending on your payment terms.

Once you are happy you can click on "Create Invoice" and you will be taken to the next step which is where you build the full invoice.

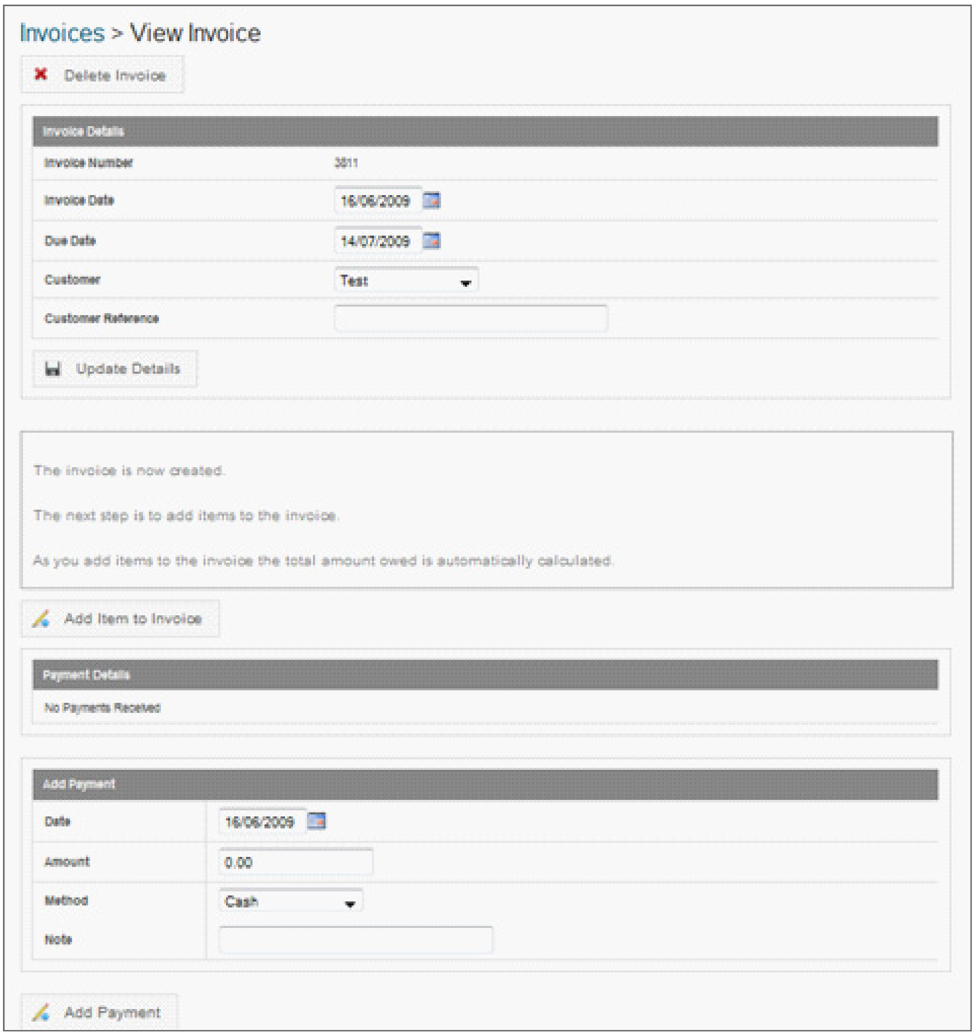
INTOUCH

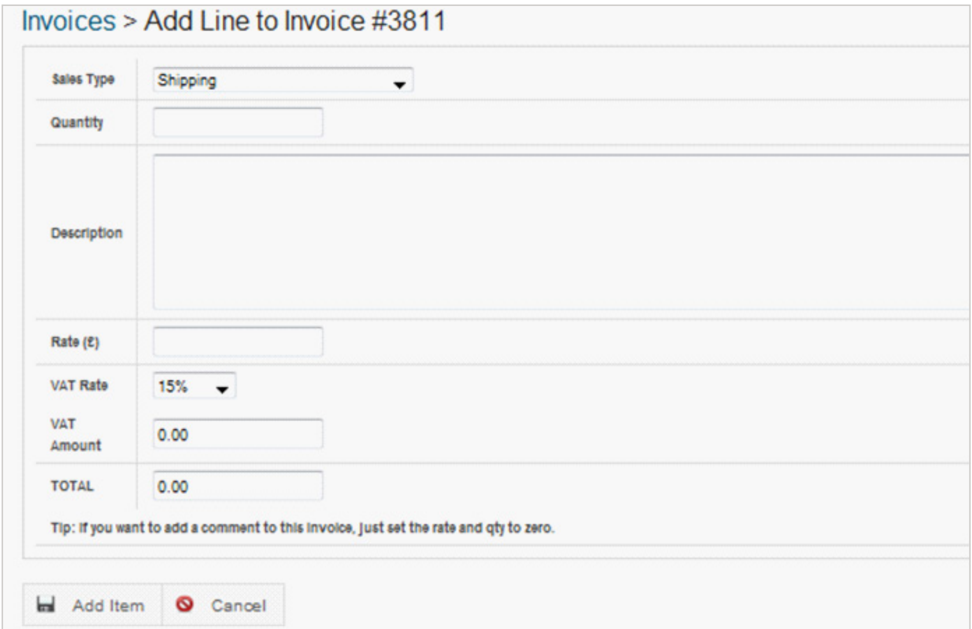
KashFlow Accounting Software

On this page you can edit the details that you have previously entered but more importantly you can add items to the invoice, so the products and services that have actually been sold can be added with their value.

To add an item, simply click on the "**Add item to invoice**" button and you will be taken to the screen (*pictured at the bottom of this page*) where you can build the real details into the invoice.

You can pick different Sale Types from Shipping to Sale of Goods. Then you can put the quantity and the description of the service in there too. This means that no matter what service or what products you sell you can make sure that it is stated clearly within the invoice.





Customers Really Matter Ltd. Registered Office: Ebdon House, 89 Ebdon Road, Weston-super-Mare, BS22 6US

Tel: 0845 310 9973 | Fax: 0845 280 2089 | e-mail: info@intouchcrm.co.uk

InTouch is developed by: CUSTOMERSREALLYMATTER

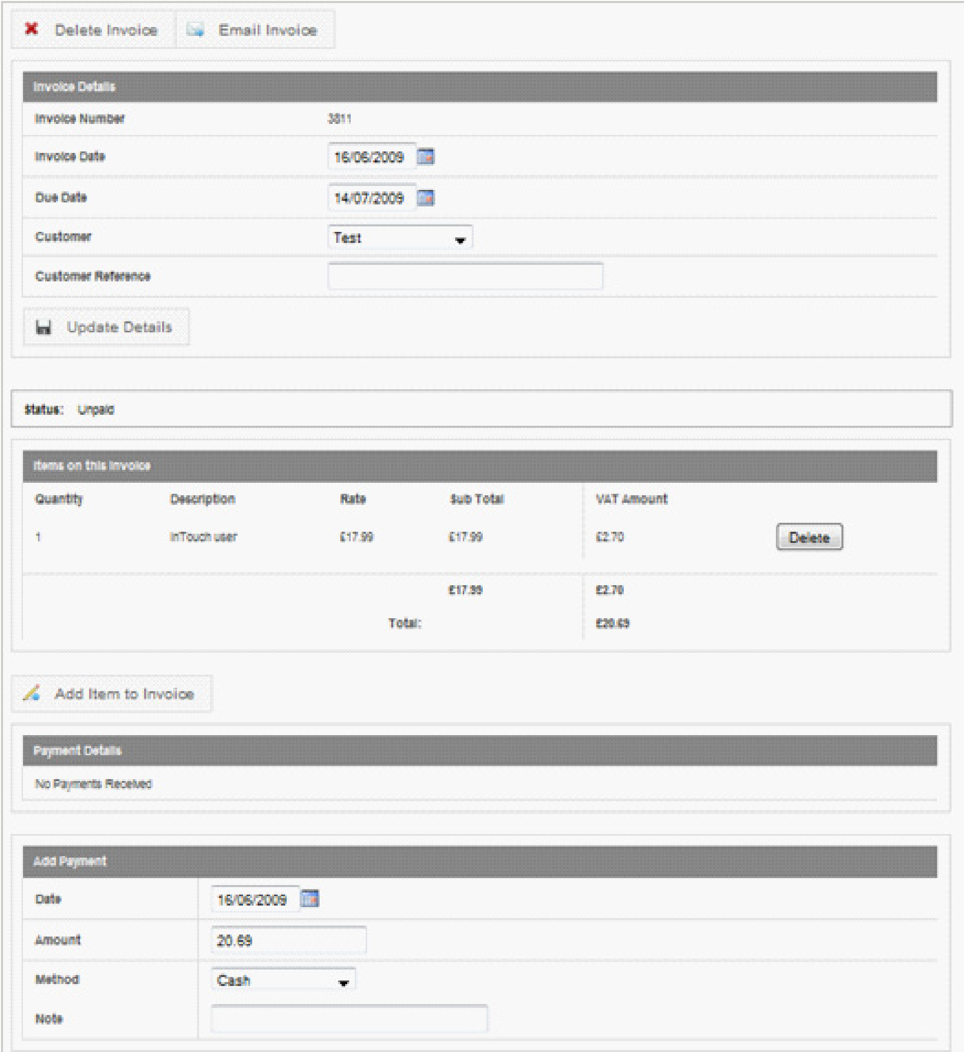
INTOUCH

KashFlow Accounting Software

Once you have filled out the top part you can put a monetary value on to it which then calculates the total price with VAT, etc. The VAT is also adjustable so if it changes you can easily allow for it.

Once you have entered in the information you can then click on "**add item**" and this gets added on to the invoice for that account. You can then repeat the step to keep adding in new products sold on the same invoice.

Once all the products and services have been added to the invoice you can then move on and complete it.



Once you have double checked all of the details you can then click on the "**Email Invoice**" and then it will get sent to the account and the main email address within there.

When the client has paid the invoice you can then go back into it and use the bottom section which allows you to add a payment. This could be anything from cash to direct debits. It's up to you!

Customers Really Matter Ltd. Registered Office: Ebdon House, 89 Ebdon Road, Weston-super-Mare, BS22 6US

Tel: 0845 310 9973 | Fax: 0845 280 2089 | e-mail: info@intouchcrm.co.uk

InTouch is developed by:

CUSTOMERSREALLYMATTER