

User Manual

Customers and Billing:

- [1. Adding a new customer](#)
- [2. List of Customers](#)
- [3. Customer Profile: Summary](#)
- [4. How much does the client owe us?](#)
- [5. Invoices: Sending invoices to the Customer](#)
- [6. Sending Statements](#)
- [7. Customer Adjustments](#)
- [8. Pushing Documents to SageOne](#)
- [9. Client portal](#)
- [10. Additional Contacts: Adding and Removing them](#)
- [11. How to complete the month end billing run on HeroTill](#)

Lead to Receipt:

- [Lead to Receipt: Overview and general actions](#)
- [Lead to Receipt: Sales Leads](#)
- [Lead to Receipt: Surveys](#)
- [Lead to Receipt: Quotes](#)
- [Lead to Receipt: Customers](#)

[Lead To Receipt: Job Cards](#)

[Lead To Receipt: Invoicing](#)