

SALES

INVOICES - COMMENT AND REFERENCE

The comment and reference feature on the Sales Invoices listing screen allows you to add or edit a comment and / or reference for a Sales Invoice, irrespective of the Status the Invoice appear in.

Ribbon Access: Sales > Invoices



- 1. The *Sales Invoices* listing screen will display.
- 2. Select the *Site* where the invoice has been created.
 - The example has *Durban* selected.
- Click on the *row* of the invoice you wish to Add or Edit a comment and / or reference.
- 4. Click on *Comment and Reference*.

Short cut key: *Right click* to display the *Process* menu list. Click on *Comment and Reference*.



	1		Sales Invoi	ces - BPO: Ve	rsion 2.4.0.11 - Exar	nple Company				
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	INV0000535	HOP001	Hope Works (Ptv) Ltd		test test	4.025.00	Printed	ZAR	CN0000143 (N)	4.025.00
	INV0000534	PAN001	Panda Copiers		test	190.00	Printed	USD	CN0000145 (N)	190.00
	INV0000533	PIN0001	Pink Shoes		Tech	1,213.71	Printed	ZAR		0.00
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	INV0000531	PIN0001	Pink Shoes		test	0.00	Printed	ZAR		0.00
-	INV0000530	HOP001	Hope Works (Pty) Ltd		test	74.89	Printed	ZAR		0.00
	INV0000529	HOP001	Hope Works (Pty) Ltd		test	0.00	Printed	ZAR		0.00
	INV0000528	PIN0001	Pink Shoes		Swap out Invoice	5,175.00	Printed	ZAR		0.00
	INV0000526	PIN0001	Pink Shoes		new copier	241,895.60	Printed	ZAR		0.00
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	INV0000524	HOP001	Hope Works (Pty) Ltd		test	14,651.95	Printed	ZAR	CN0000139 (P)	14,651.95
	INV0000523	HOP001	Hope Works (Pty) Ltd		test	14,674.90	Printed	ZAR	CN0000138 (P)	14,674.90
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	INV0000521	GET001	Get Up and Go		test	621.00	Printed	ZAR		0.00
	INV0000520	GET001	Get Up and Go		1234	1,104.00	Printed	ZAR		0.00
	INV0000519	GET001	Get Up and Go		1234	993.60	Printed	ZAR		0.00
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opun milliona							user : Juidi lu	un 02/03/	LULI VEI 30/1 : 2.4.0.11	example company

- 5. The *Invoice No. [invoice number] comment maintenance* screen will display.
- 6. If a Reference number and comments have already been added for the Invoice, then these fields will be populated.

These fields are mandatory fields on this screen and can therefore not be left blank.

- **Reference:** Type the reference number for the Invoice or make the required changes to the existing reference number.
- **Comments:** Type the comments for the Invoice, or make the necessary changes to the comments. The comments will appear on the Invoice.
- 7. When finished updating the screen, click on *OK* to save the reference and comments to the Invoice, or
 - Click *Back* to discard any changes.



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Open W	/indows *							User : J	ulandaK	02/03/2021	Version : 2.4	4.0.11	Example Cor	npany	

- 8. You will return to the *Sales Invoices listing* screen.
- 9. The updated **Reference number** will display in the *Invoice Description* field.
 - Use the scroll bar at the bottom of the screen to the view the updated **Comments** in the *Comments* column.



Invoices - Comment and References

\$ 7				8		Sales Invoid	es - BPO: Ver	sion 2.4.0.11 - Exar	nple Company				
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				INV0000535	5 HOP001	Hope Works (Pty) Ltd		test test	4,025.00	Printed	ZAR	CN0000143 (N)	4,025.00
				INV0000534	PAN001	Panda Copiers		test	, 190.00	Printed	USD	CN0000145 (N)	190.00
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				INV0000529	HOP001	Hope Works (Pty) Ltd		test ,	0.00	Printed	ZAR		0.00
				INV0000528	8 PIN0001	Pink Shoes		Swap out Invoice	5,175.00	Printed	ZAR		0.00
				INV0000526	5 PIN0001	Pink Shoes		new copier	241,895.60	Printed	ZAR		0.00
				INV0000525	5 BIG0001	Big Bargains		Test email	602.60	Printed	ZAR		0.00
				INV0000524	HOP001	Hope Works (Pty) Ltd		test	14,651.95	Printed	ZAR	CN0000139 (P)	14,651.95
				INV0000523	B HOP001	Hope Works (Pty) Ltd		test	14,674.90	Printed	ZAR	CN0000138 (P)	14,674.90
				INV0000522	2 TIA001	Titan Group	1	1234	575.00	Printed	ZAR		0.00
				INV0000521	GET001	Get Up and Go	1	test	621.00	Printed	ZAR		0.00
				INV0000520	GET001	Get Up and Go	1	1234	1,104.00	Printed	ZAR		0.00
				INV0000519	GET001	Get Up and Go	1	1234	993.60	Printed	ZAR		0.00
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10. Navigate to the <u>View Customer Invoice</u> screen to view the changes and / or additions to the Reference and Comments for the Invoice.

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