

SALES

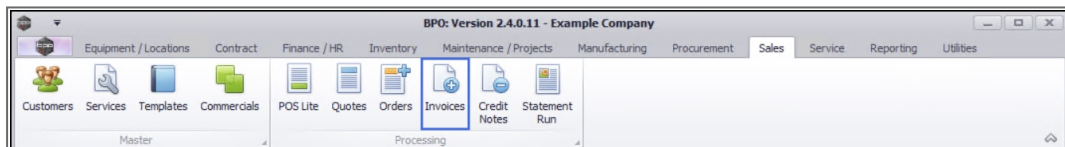
INVOICES – PRINT SALES INVOICE

The first time an invoice is printed, it will state: **Tax Invoice**. Each time thereafter, it will state **Copy - Tax Invoice**.

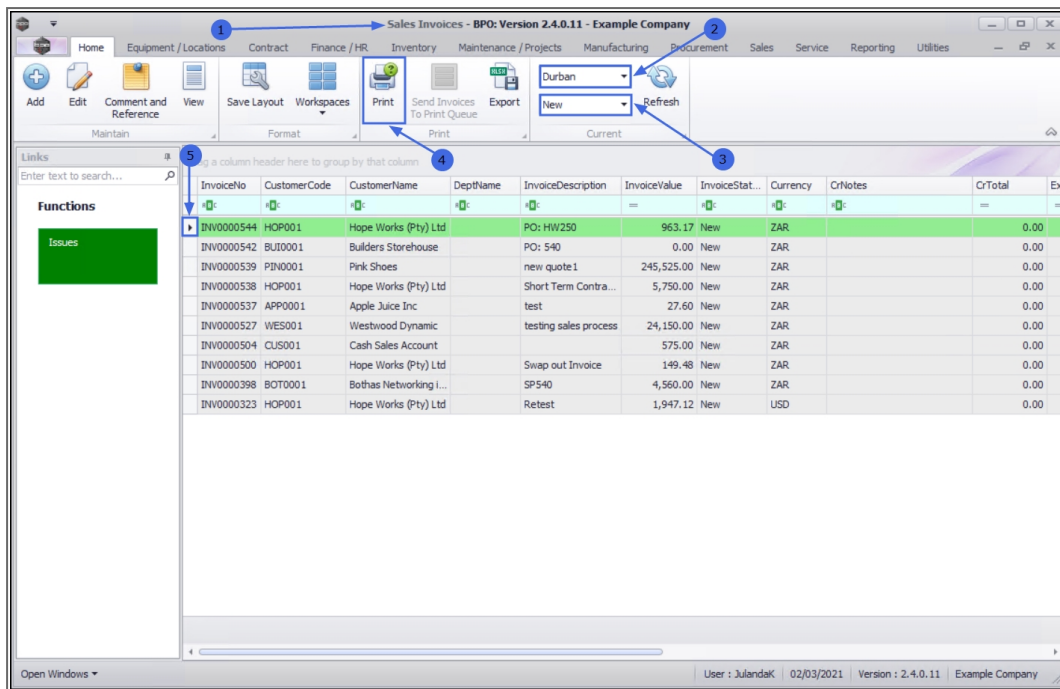
If you need to re-print an original Tax Invoice due to a network connection issue, etc. Then you will need to use the **Print Queue Reprint** functionality.

When using the '**Email**' option to send a Sales Invoice, note that it will be emailed via the **BPO Email Service** on the **server** and not from Microsoft Outlook on your desktop.




Ribbon Access: *Sales > Invoices*



1. The **Sales Invoices** listing screen will display.
2. Select the **Site** where the invoice can be located.
 - The example has **Durban** selected.
3. Ensure that the **Status** is set to **New Order**.
 - Refer to the **Introduction** above for explanation on printing previously emailed invoices.
4. Click on the **row** of the **invoice** you wish to print.
5. Click on **Print**.



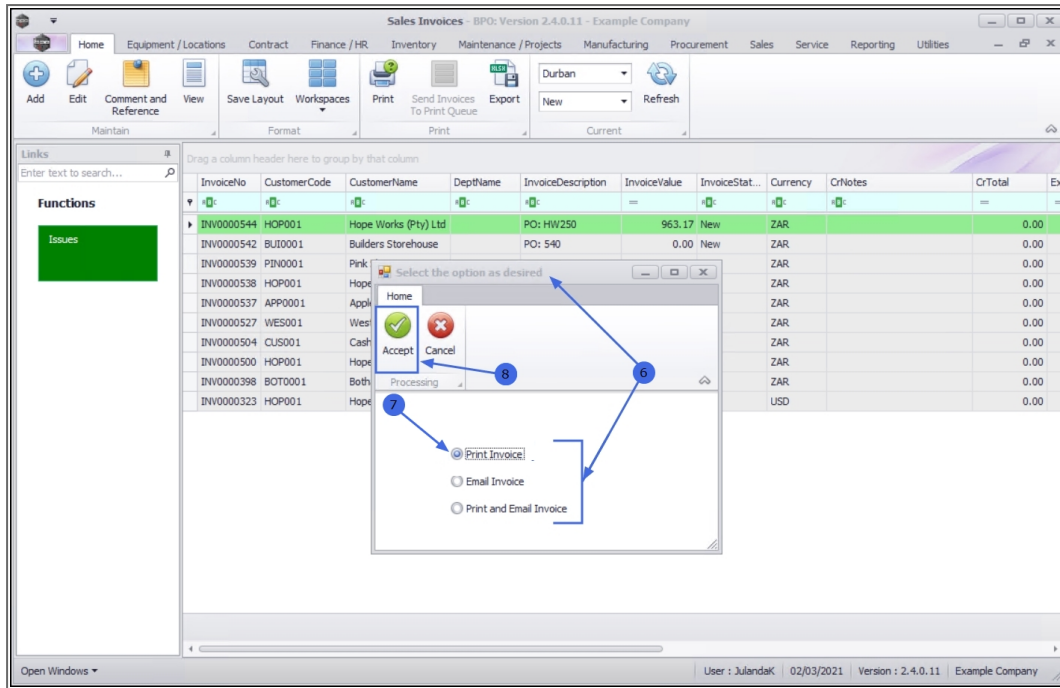
6. The **Select the option as desired** screen will display.

-  **Print Invoice** will open the Invoice in the Report Preview to view, print, export or email.
-  **Email Invoice** will attach documents, add recipients, the system will create a .pdf and email the Invoice.
-  **Print and Email Invoice** will display both the Report Preview and Email screens.

PRINT TAX INVOICE

7. To print the Tax Invoice, click on the **Print Invoice** radio button.

8. Click on **Accept**.

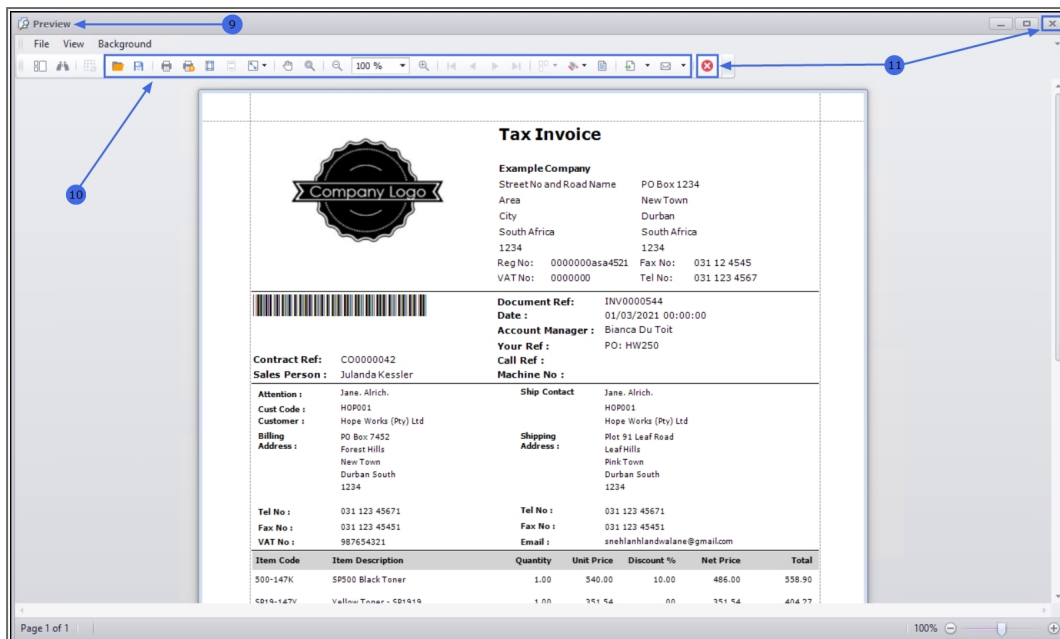


9. The **Report Preview** screen will display.



Note that the header reads **Tax Invoice**. The *first time* an invoice is printed, it will state: **Tax Invoice**. Each time *thereafter*, it will state **Copy - Tax Invoice**.

- From the preview screen you can make cosmetic changes to the Tax Invoice, as well as **Save**, **Zoom**, **Add a Watermark**, **Export** or **Email** from the preview screen.
- Click on **Close** to return to the **Sales Invoices** listing screen.

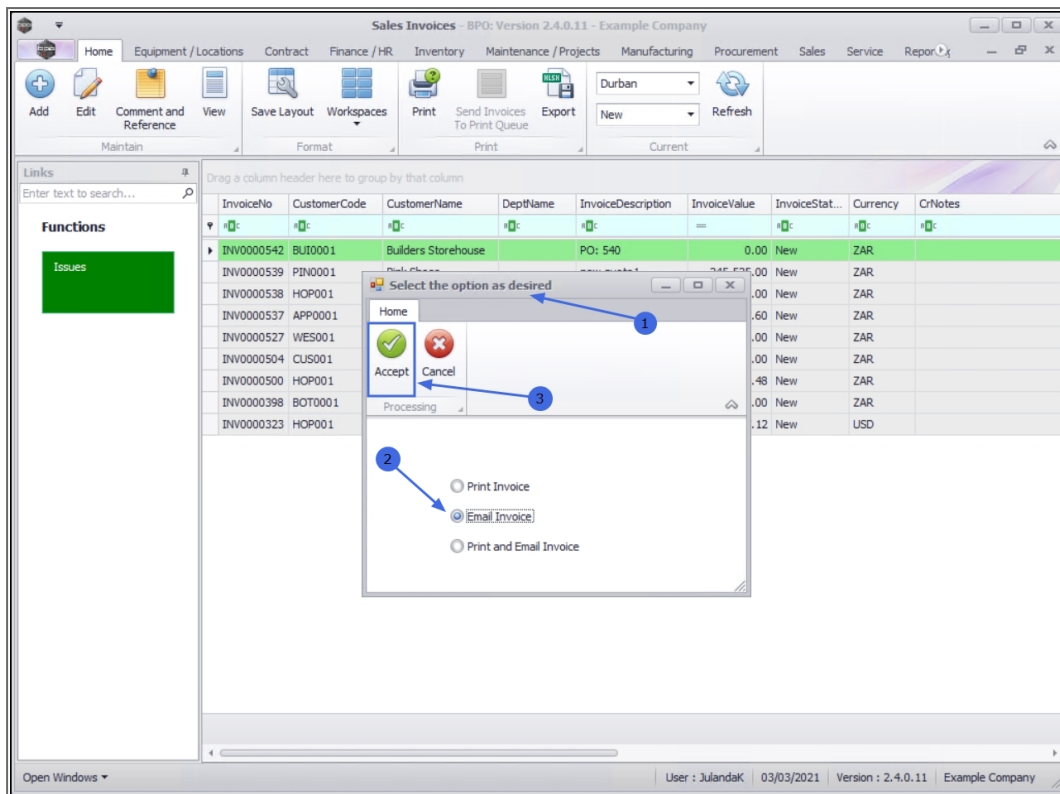


EMAIL INVOICE / PRINT AND EMAIL INVOICE



If you get an **error** when trying to email the document, ask your administrator to make sure that the correct shared folder location has been configured in BPO and that you have the relevant folder rights to access the shared folder on the server.

1. From the **Select the option** as desired screen,
2. Click on the **Email Invoice** radio button.
3. Click on **Accept**.



4. The **Email Sales Invoice: INV[invoice number]** screen will display, for both Email Invoice or Print and Email Invoice options.

EMAIL HEADER

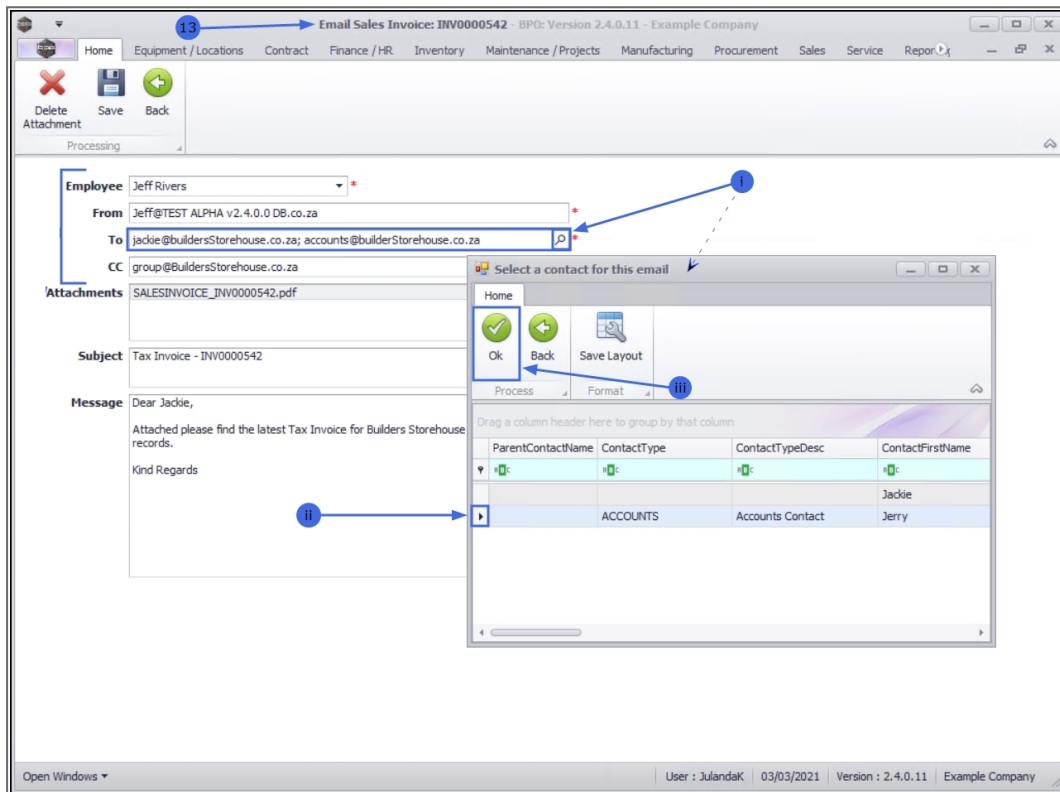
- **Employee:** The employee who is currently logged on will display in the employee field. Click on the drop-down **arrow** to choose an alternative employee name, if required.
- **From:** The email address of the employee will display in this field.
- **To:** To add a contact email address,
 - i. Click on the **search button** to display the **Select a contact for this email** screen.
 - ii. Click on the **row** of the email address of the **Customer Contact** you wish to add.
 - iii. Click on **OK**.

- **CC:** If a group email address has been set up on the order or accounts contact, then the group email address will display here.



Additional email addresses can be added to either the **To:** or **CC:** by separating the email address with a [;].

- The example has the accounts contact person added to **To:** *jackie@builderStorehouse.co.za; accounts@builderStorehouse.co.za*.



Employee: Jeff Rivers

From: Jeff@TEST ALPHA v2.4.0.0 DB.co.za

To: jackie@buildersStorehouse.co.za; accounts@builderStorehouse.co.za

CC: group@BuildersStorehouse.co.za

Attachments: SALESINVOICE_INV0000542.pdf

Subject: Tax Invoice - INV0000542

Message: Dear Jackie,
Attached please find the latest Tax Invoice for Builders Storehouse records.
Kind Regards

Select a contact for this email

ParentContactName	ContactType	ContactTypeDesc	ContactFirstName
	Accounts	Accounts Contact	Jackie
	Accounts	Accounts Contact	Jerry

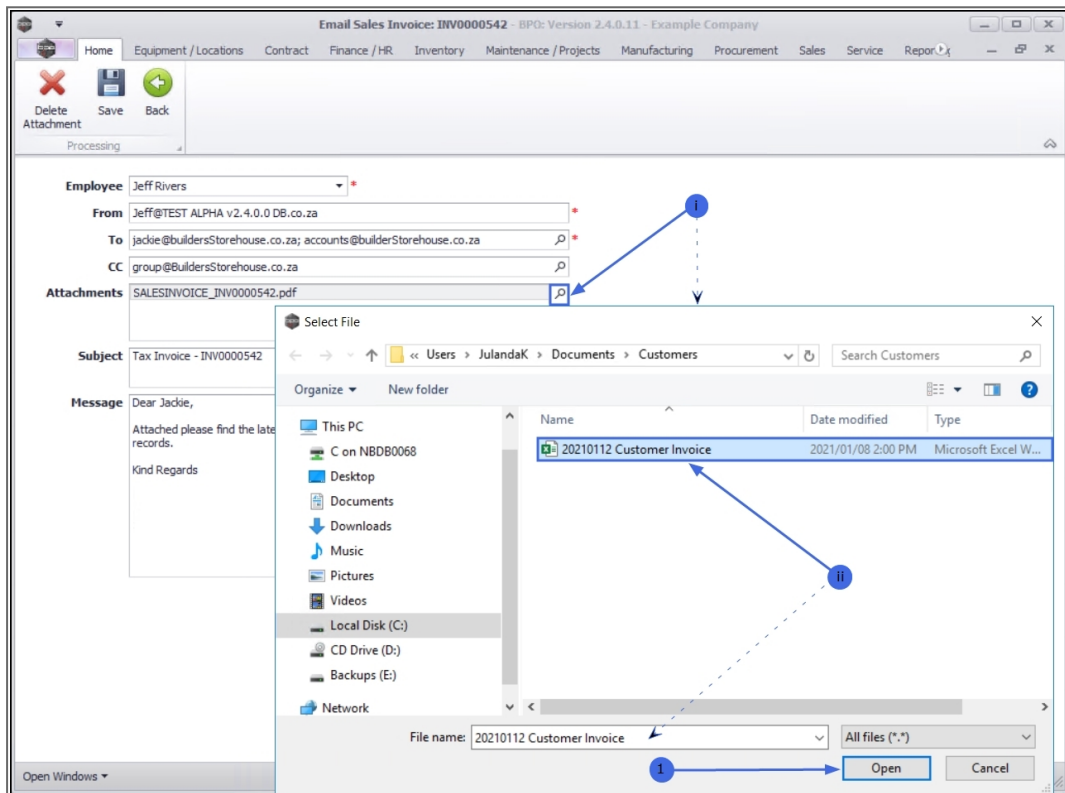
EMAIL ATTACHMENTS

- **Attachments:** BPO will create a PDF of the order and attach it automatically (you can attach additional documentation if required).

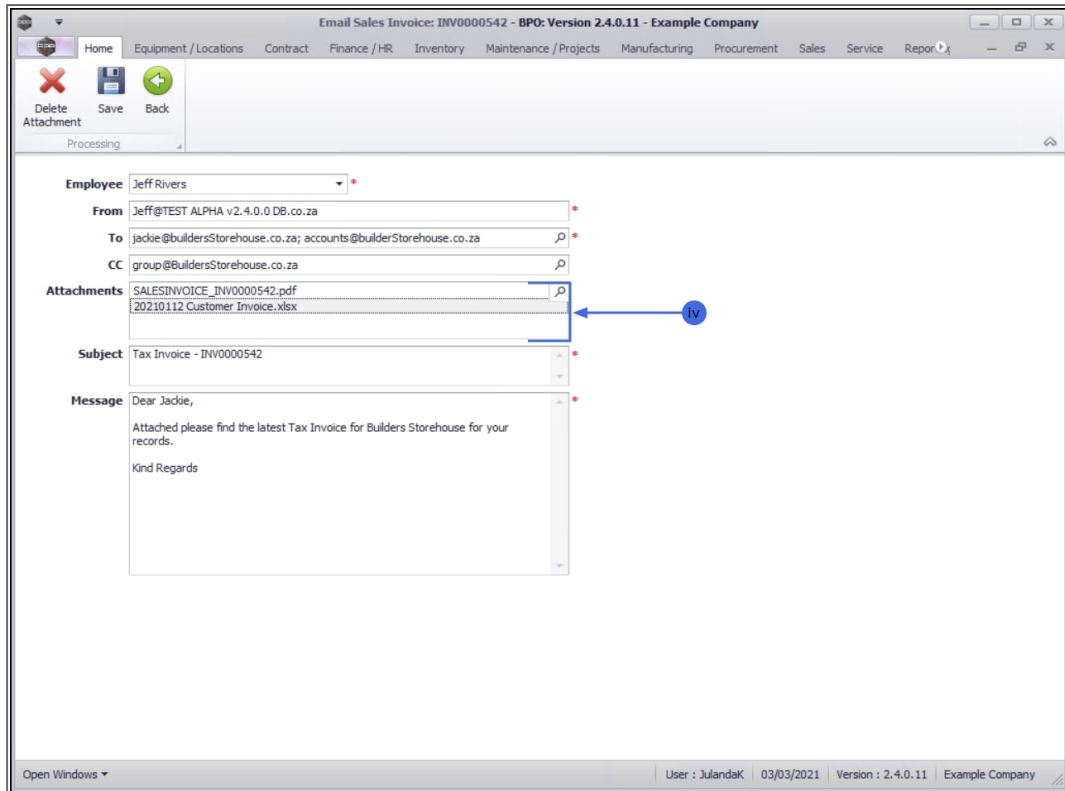


If there are outstanding parts that have not been issued, a Back Order report will also be attached.

- i. To add an additional attachment, click on the **search** button in the **Attachments** field to display the **Select File** window.
- ii. You can **browse** to find the file location of the document you wish to attach, then **click** on the file you wish to attach.
- iii. Once you have selected the file, click on **Open**.



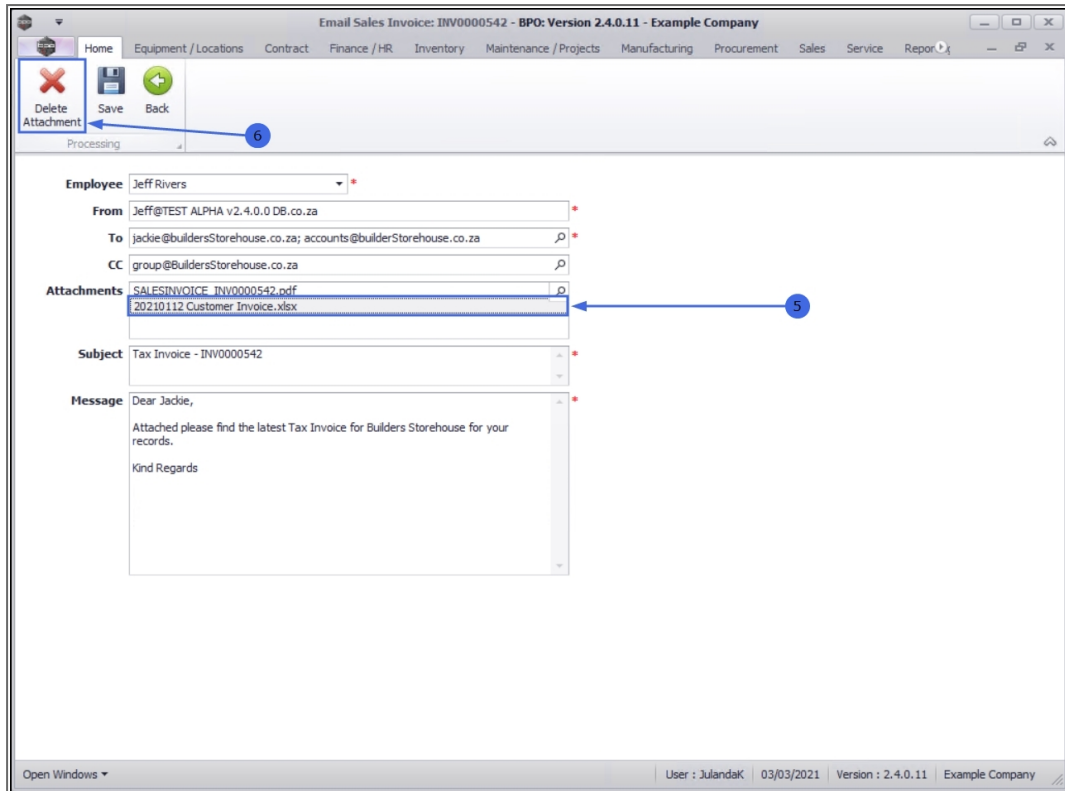
- iv. The document has been added as an **Attachment**.



Delete Attachment

You may choose to delete an obsolete or incorrectly attached document.

5. Click on the **attachment** you wish to remove.
6. Click on **Delete Attachment**.



EMAIL SUBJECT AND MESSAGE

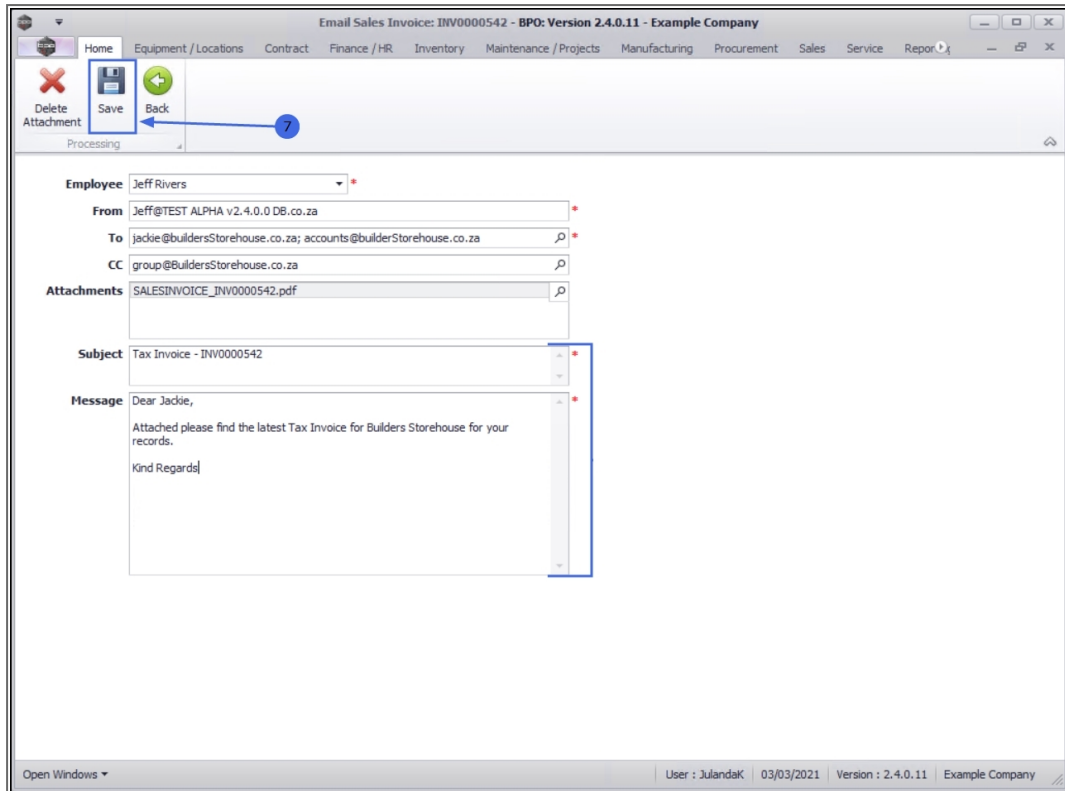
- **Subject:** Click in the text box to type the email subject line.



Remember that this is the first reference to the email, that your Customer will see

- **Message:** Type an email text message.

7. Once you have completed your email, click on **Save**.

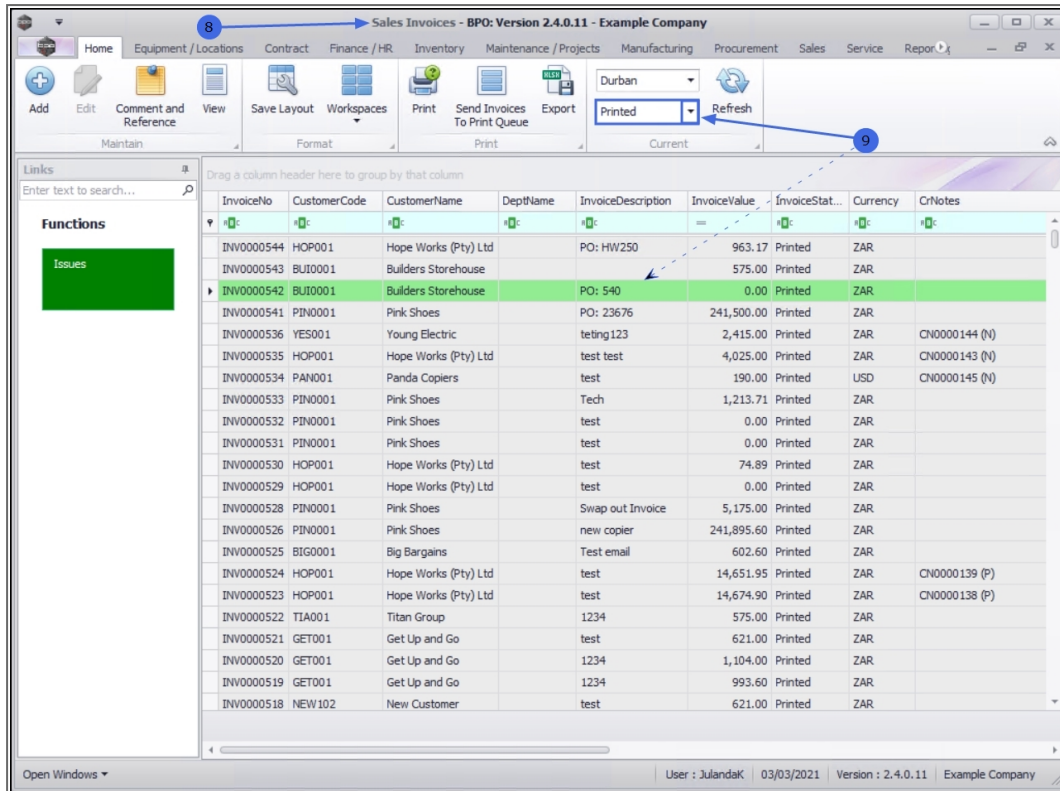


8. You will return to the **Sales Invoices** listing screen.



You will not be able to view the Invoice in the New **Status** list.

9. Click on the down **arrow** to change the **Status** to **Printed**.



Sales Invoices - BPO: Version 2.4.0.11 - Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reports

Add Edit Comment and Reference View Save Layout Workspaces Print Send Invoices To Print Queue Export

Durban Printed Refresh

Links: Enter text to search...

Functions: Issues

InvoiceNo	CustomerCode	CustomerName	DeptName	InvoiceDescription	InvoiceValue	InvoiceStat...	Currency	CrNotes
INV0000544	HOP001	Hope Works (Pty) Ltd		PO: HW250	963.17	Printed	ZAR	
INV0000543	BUI0001	Builders Storehouse			575.00	Printed	ZAR	
INV0000542	BUI0001	Builders Storehouse		PO: 540	0.00	Printed	ZAR	
INV0000541	PIN0001	Pink Shoes		PO: 23676	241,500.00	Printed	ZAR	
INV0000536	YES001	Young Electric		teting 123	2,415.00	Printed	ZAR	CN0000144 (N)
INV0000535	HOP001	Hope Works (Pty) Ltd		test test	4,025.00	Printed	ZAR	CN0000143 (N)
INV0000534	PAN001	Panda Copiers		test	190.00	Printed	USD	CN0000145 (N)
INV0000533	PIN0001	Pink Shoes		Tech	1,213.71	Printed	ZAR	
INV0000532	PIN0001	Pink Shoes		test	0.00	Printed	ZAR	
INV0000531	PIN0001	Pink Shoes		test	0.00	Printed	ZAR	
INV0000530	HOP001	Hope Works (Pty) Ltd		test	74.89	Printed	ZAR	
INV0000529	HOP001	Hope Works (Pty) Ltd		test	0.00	Printed	ZAR	
INV0000528	PIN0001	Pink Shoes		Swap out Invoice	5,175.00	Printed	ZAR	
INV0000526	PIN0001	Pink Shoes		new copier	241,895.60	Printed	ZAR	
INV0000525	BIG0001	Big Bargains		Test email	602.60	Printed	ZAR	
INV0000524	HOP001	Hope Works (Pty) Ltd		test	14,651.95	Printed	ZAR	CN0000139 (P)
INV0000523	HOP001	Hope Works (Pty) Ltd		test	14,674.90	Printed	ZAR	CN0000138 (P)
INV0000522	TIA001	Titan Group		1234	575.00	Printed	ZAR	
INV0000521	GET001	Get Up and Go		test	621.00	Printed	ZAR	
INV0000520	GET001	Get Up and Go		1234	1,104.00	Printed	ZAR	
INV0000519	GET001	Get Up and Go		1234	993.60	Printed	ZAR	
INV0000518	NEW 102	New Customer		test	621.00	Printed	ZAR	

Open Windows User : JulandaK | 03/03/2021 | Version : 2.4.0.11 | Example Company

Related Topics

- [Print Invoice](#)
- [View Invoice](#)
- [Send Invoices To Print Queue](#)

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