

SERVICES

WORK ORDERS - INVOICES

From the **Invoices** tile you can *Add*, *Edit*, add a *Comment and Reference*, *View* and *Print an Invoice*.

The Issues Functions tab will display stock that is issued to the invoice, where it is an OTC Invoice.

Ribbon Access: Service > Work Orders

| \$ | Ŧ | | | | | E | PO: Ver | sion 2.5.0.4 - Ex | cample Comp | any v2.5.0 |).0 | | | | | _ D X |
|--------|-----|-------------------|--------------------------|-------------|----------------------------|-----------------|---------|-------------------|-------------|---------------------|-----------------|---------------------|---------|--|-----------|--------------|
| | | Equipment | /Locations | Contract | Finance / HR | Inventory | Mainten | ance / Projects | Manufactur | ing Pro | curement | Sales | Service | Reporting | Utilities | |
| Tech I | Мар | 312 Scheduling | Current Tech Activity | Technicians | Availability Exceptions | Site Exceptions | Calls | Call Requests | Work Orders | Service Requests | 🐉 WIP 💼 Work | Managemen Review | t 🔳 M | 4y Work Orders 4y Tickets All Open Tickets | My Work | |
| | | | Te | chnical | | | | | Proce | SS | | | | Ticketing | Open W | \Diamond |

- 1. The *Work Order Listing* screen will be displayed.
- 2. Select the *Site* where the work order was issued.
 - The example has *Durban* selected.
- 3. Select the *Status* for the work order.
 - The example has *Active* selected.
- 4. Select the *row* of the work order you wish to invoice.
- 5. Click on the *Invoices* tile.



Work Orders - Invoices

| | dit Delete | View | Close | Complete | | 🐐 Save F | paces • Print Export Open | | Find WO Reports | | | |
|--------------|------------|-------|----------|----------|--------|------------------|---|------------|--------------------------|-------------|--------------------|--------------|
| | Maintain | | 4 | Process | | ∡ Forma | at 🔺 Print 🔺 | Current 3 | A Reports | 4 | | 6 |
| Links | | # Dri | | | | p by that column | | | | | | |
| Enter text b | o search | 4 | WOCode | | WOType | CallReference | Description | Capitalise | CallDesc | RequestDa 🕶 | Priority Invoiceab | e ProjectR |
| Mainter | nance | ٣ | R C | | # 🖬 C | *OC | ADC | REC | 8 C | - | 40c | * 0 ¢ |
| | | | . wooooe | 262 | IMP | | Additional equipment requested during ins | No | | 04/04/2022 | 2 No | PR.J0000 |
| | | | . wooooe | 261 | IMP | CN0005305 | B6004 | No | B6004 | 04/04/2022 | 2 No | |
| Time Re | eview | | E W00006 | 260 | REP | CN0005304 | Loan unit required while main unit is being | . No | Loan unit required whil | 15/03/2022 | 3 No | |
| Time rec | | | . WO0006 | 259 | REP | CN0005303 | Post Contract machine repair | No | Drum replacement req | 16/02/2022 | 2 Yes | |
| | | | . WO0006 | 258 | SERV | CN0005303 | Drum replacement required | No | Drum replacement req | 31/01/2022 | 2 No | |
| | | | | 256 | IMP | CN0005302 | New machine implementation. Installation . | No | New machine implemen | 24/01/2022 | 1 No | |
| | | | | 257 | NDS | CN0005274 | PROJ406OR002 | No | PROJ406OR002 | 19/01/2022 | 2 No | |
| | | | | 253 | PR | CN0005301 | Replace part - current faulty | No | Replace part - current | 18/01/2022 | 3 No | |
| Process | sing | | | 252 | REP | CN0005300 | Printer displaying error code | No | Printer displaying error | 18/01/2022 | 3 No | |
| Ouotes | | | | 251 | ITS | CN0005299 | Paper keeps on jamming in machine | No | Paper keeps on jammin | 18/01/2022 | 3 No | |
| Quotes | | | | 250 | REP | CN0005298 | Paper not feeding through rollers | No | Paper not feeding thro | 14/12/2021 | 3 No | |
| | | | . WO0006 | 249 | SM | | BathBinMaint - Bathroom Bin Maintenance | No | | 23/11/2021 | 2 No | PR.30000 |
| | | | . WO0006 | 248 | SM | | WS - Weekly Service | No | | 23/11/2021 | 2 No | PRJ0000 |
| Orders | | 5 | 00000 E | 247 | SM | | BathBinMaint - Bathroom Bin Maintenance | No | | 23/11/2021 | 2 No | PR.30000 |
| | | | . WO0006 | 246 | SM | | BathBinMaint - Bathroom Bin Maintenance | No | | 23/11/2021 | 2 No | PR.J0000 |
| | | | . WO0006 | 245 | SM | | WS - Weekly Service | No | | 23/11/2021 | 2 No | PR.J0000 |
| Invoice | | | . WO0006 | 243 | SM | | WS - Weekly Service | No | | 16/11/2021 | 2 No | PRJ0000 |
| | | | . wooooe | 242 | SERV | | 1MMS - 1 Month Machine Service | No | | 16/11/2021 | 2 No | PR.J0000 |
| | | | . WO0006 | 241 | SM | | WS - Weekly Service | No | | 16/11/2021 | 2 No | PRJ0000 |
| Credit | Notes | | . WO0006 | 240 | SM | | WS - Weekly Service | No | | 16/11/2021 | 2 No | PR.30000 |

- 6. The *Sales Invoices for Work Order [work order number]* screen will display.
- The *Site* from the Work Order Listing screen will not automatically pull through to the *Sales Invoices for Work Order* screen, click on the down *arrow* to change the *Site* filter.

ADD SALES INVOICE

8. Click on *Add*.

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



| 🍅 👻 🌔 | 6 | Sales In | voices for Work Ord | er W00006260 - BPC | Version 2.5.0. | 8 - Examp | le Company v2.5 | .0.8 | | | _ |
|-----------------------------------|-----------------|------------------|-----------------------------|-----------------------------|----------------|--------------|-----------------|---------|-------------|---------------|------------|
| Home Equipm | ent / Locations | Contract Fina | nce / HR Inventory | Maintenance / Proje | cts Manufact. | uring Pro | ocurement Sales | Service | Reporting | Utilities | _ @ × |
| Add Edit Comment a Reference | and View S | Save Layout Work | ispaces Print Se To | end Invoices Print Queue | Durban | - | Fresh | | | | |
| 8 | | Format | 4 | Print 4 | Curr | ent | 4 | | | | 6 |
| Links 4 Enter text to search P | | | | | | | | | | | |
| | InvoiceNo | CustomerCode | CustomerName | | | Currency | ExchangeRate | TaxRate | InvoiceDate | InvoiceStatus | SalesmanEm |
| Functions | | 8 0 0 | PDC Office Supplies Unli | a 🗖 c | | 8 0 ¢ | - 1.00 | = | | ADC N | RES001 |
| | | | | | | | | | | | |
| | | | | | | | | | | _ | |

- 9. "The Add new Customer Invoice screen will display." on page 2
- 10. Complete the *Sales Invoice Header* and the *Financial Header* information.
- 11. Confirm the *Billing and Shipping Addresses*, if these fields were not populated when you entered the Header information.



| | ∓ Home | Equipment / Local | | Add ne | | ce - BPO: Version 2.5.0 aintenance / Projects |).8 - Example Manufacturing | and the second | | Service | Reporting | Utilities | _ @ x |
|----------|----------------|--|-------------|-----------------------------|---------------------------------|--|--------------------------------|--|---------------|-----------|-----------|------------------|-------------------------------------|
| Save | | dete tem | | 0 | | | | | | | | | ~ |
| | | Office Supplies Unl | imited | * م * م | Reference INV20 | 004 | • | Billing address | 5 | ـ ـ م | 7 | | |
| | | Samantha Times Type Class Comme | rcial | | Status New Oate & Time 05/04 | ŧ/2022 ▼ 14:01:39 | 9 🗘 | Forest Hills | | | | | |
| | ng Customer | Julanda Kessler Office Supplies Unl | | | ling Contact Sama | ntha Times | | Shipping addr 674 Nightwish / Forest Hills 1234 | | به م ۲ | | | |
| Invo | Tax Rate | South African Ran 15.00 | | • Exc | hange Rate | ippress Line Detail on | 1 🗘 * | | elated Refere | nces | | | |
| Su | uppressOnPrint | ItemType | ItemCode | ItemDescription | InvoiceLineDescriptio | | BatchSerial | | UnitCost | Markup | Discount | UnitSellingPrice | BaseCcyPrice |
| ٣ | | - | 8 🗖 c | 8 0 0 | R C | 8 0 0 | a∎c | - | - | - | - | - | - |
| • | | Labour | DRV TOLL | Driver Marianhill Ridge, | Driver Marianhill Ridge, Tol | | | 4.000 | 350.000 | 15.000 | 0.000 | 172.500 | 172.50 31.05 |
| | | Expenses Expenses | ON | 2, | Over night stay as in | | | 1.000 | 27.000 | 15.000 | 0.000 | 31.050 | 862.50 |
| | | Expenses | TOLL | | Marianhill Ridge, Tol | | | 1.000 | 27.000 | 15.000 | 0.000 | 31.050 | 31.05 |
| | | Expenses | TOLL | | Marianhill Ridge, Tol | | | 1.000 | 27.000 | 15.000 | 0.000 | 31.050 | 31.05 |
| | | Warranty | 12MSW | | 12 Month Supplier W | | | 1.000 | 0.000 | 15.000 | 0.000 | 0.000 | 0.00 |
| | | Select type | 10.011 | 12 Ploner Supplin | 12 Horrar Supplier H | | | 1000 | 01000 | 151000 | 0.000 | 0.000 | 0100 |
| د Con | nment | | | | | | | | | Sub | Total VAT | |) 1,645.65 246.85 1,892.50 |
| 0000 | n Windows 🔻 | | | | | | | licer : Julandak | 05/04/202 | | | Example Compan | |

- 12. Click on the *Related References* tab to enter the reference information for the Customer Order.
 - The Work Order Reference has been auto populated with the selected Work Order number.
 - When referencing a work order which has stock issued, but not yet invoiced, will auto populate the frame.
- 13. Edit the *Items to be Invoiced* as required.
- Drag and drop rows to set the order you wish the items to be displayed on the sales invoice. This order will directly be pulled into the printed invoice when generated.



Work Orders - Invoices

| â - | | | | | Edit Customer Invoi | ce - TNV00 | 0532 - | BPO: Ve | ersion 2.5.0.9 | 9 - Examp | le Company | / | | | | | _ – x |
|------------------|-------------------------|--------------|-----------------|------------------------|-----------------------|------------|---------|------------------|----------------|-----------|------------|------------------|----------------|----------|-----------------|-----------|--------------------|
| Home | Equipment / Loc | ations Co | ontract Finance | | Maintenance / Project | | | | ocurement | | | | Hes | | | | - & × |
| | kete eem x Format | | | | | | | | | | | | | | | | ۵ |
| Customer Name | Hope Works (Pty) | Ltd | * 0 | Reference Nova | | | Billing | g addre | :55 | | | | | | | | |
| Contact Name | | | • م | Status New | | ÷ | PO Bo | ox 7452 | | ,P | | | | | | | |
| Commercial | Default | | | Date & Time 01/04/20 | 13:34:34 | \$ | New " | st Hills Town | | - | | | | | | | |
| Salesman | Bianca Du Toit | | - * | | | 1 | Shipp | oing add | dress | | | | | | | | |
| Billing Customer | Hope Works (Pty) | Ltd | , Р * Ві | lling Contact Account | s Contact | • 9 | | | | <u>م</u> | | | | | | | |
| Invoice Currency | South African Ran | 4 | * Ex | change Rate | | 1 🗘 * | | | | | | | | | | | |
| Tax Rate | 15.00 - | | 15 Ç | Supp | ress Line Detail on | Print | Addres | SSPS F | Related Refere | ences | | | | | | | |
| SuppressOnPrint | ItemType | ItemCode | ItemDescription | InvoiceLineDescription | WarehouseName | BatchSeria | | uantity | UnitCost | Markup | Discount | UnitSellingPrice | BaseCcyPrice | TaxRate | Department | Status | |
| • E | = | * D C | RDC | FE: | *Ec | +Dr | | = | = | = | = | = | = | = | *Department | FOC | |
| | Parts | CHA001 | Chair | Chair | Main Warehouse | | | 1.00 | 0.000 | 0.000 | 0.000 | 879.950 | 879.950 | 15.000 | Sales Depar | A | |
| | Parts | 500-147K | SP500 Black Ton | SP500 Black Toner | Main Warehouse | | | 1.00 | | | | | 540.000 | | Sales Depar | | |
| | Internal Service | DEL | Delivery Fee | Delivery Fee | | | | 1.00 | 0.000 | 0.000 | 10.000 | 960.000 | 960.000 | 15.000 | Sales Depar | A | |
| • | Warranty | 1YSW | 1 Year Supplier | 1 Year Supplier Warra | | | | 1.00 | 0.000 | 0.000 | 0.000 | 250.000 | 250.000 | 15.000 | Sales Depar | A | |
| • 🗉 | Select type | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| Comment | | | | * | | | | | | | | | | | ub Total VAT | | 2,533.95 380.09 |
| | | | | ~ | | | | | | | | | | | nd Total | | 2,914.04 |
| Open Windows 🕶 | | | | | | | | | | | | | User : Biancal | 25/03/20 | 22 Version : | 2.5.0.9 E | xample Company |

- 15. Click in the *Comments* text box to type in a comment related to the invoice.
- 16. Click on *Save* to save the Customer Invoice details.

For a detailed handling of this topic refer to Invoices - Create Sales Invoice (OTC)



| Contact Comr Sal Billing Cus Invoice Cu | t Name S nercial T esman J stomer C | Format Office Supplies Unl amantha Times ype Class Comme ulanda Kessler Office Supplies Unl iouth African Ran 5.00 | ercial limited | | Reference Status Date & Time illing Contact cchange Rate | New 05/04/202 Samantha | | ې ۱ 🗘 | ReferenceTyp Order No Work Order Re Serial No Call Reference Contract No Project Refere | eference V 1 | eferenceNo VO0006260 912-10203 | 7 | · | |
|---|--|---|-------------------|-------------------|--|------------------------------|---------------|------------|---|-----------------|--------------------------------------|----------|------------------|-------------|
| Suppress | | ItemType | ItemCode | ItemDescription | InvoiceLineDe | | WarehouseName | BatchSeria | dresses Re | lated Refere | nces 🗲 | Discount | UnitSellingPrice | BaseCcvPric |
| | | = | ROC | ADC | RDC | - past | REC | | = | = | = | = | = | = |
| [| | Labour | DRV | Driver | Driver | | | | 4.000 | 350.000 | 15.000 | 0.000 | 172.500 | 172. |
| | | Expenses | TOLL | Marianhill Ridge, | . Marianhill Ridg | e, Toll to | | | 1.000 | 27.000 | 15.000 | 0.000 | 31.050 | 31. |
| | 3 | Expenses | TOLL | Marianhill Ridge, | . Marianhill Ridg | e, Toll to | | | 1.000 | 27.000 | 15.000 | 0.000 | 31.050 | 31. |
| . [| | Warranty | 12MSW | 12 Month Suppli | 12 Month Supp | plier War | | | 1.000 | 0.000 | 15.000 | 0.000 | 0.000 | 0. |
| F [| | Select type | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |

 The Sales Invoices for Customer listing screen will be updated with the new Invoice you have created.

|] ₹ | | | Sal | les Invoices | for Work Ord | ler W00006260 - BP | O: Version 2.5. | 0.8 - Examp | ble Company v2.5 | .0.8 | | | |
|---------------------|-----------|--------------|---------------|--------------|-----------------|-----------------------------|-----------------|-------------|------------------|-----------|-------------|---------------|---------------|
| Home E | Equipment | / Locations | Contract | Finance / Hi | R Inventory | Maintenance / Proj | ects Manufac | turing Pro | ocurement Sales | s Service | Reporting | Utilities | - 8 |
| | ment and | View | Save Layout | Workspaces | Print Se | end Invoices Print Oueue | Durban | • Re | fresh | | | | |
| Maintai | | | Form | at | | Print | , Cu | rrent | | | | | |
| inks | | Tran a colum | header here t | | aat column | | | | | | | // | |
| nter text to search | | InvoiceNo | | | omerName | InvoiceDescription | InvoiceValue | Currency | ExchangeRate | TaxRate | InvoiceDate | InvoiceStatus | Salesman |
| Functions | | | REC | REC | Anerhanic | REC | = | soc. | = | = | = | #BC | alle striding |
| Tunctions | | - | 72 OFF001 | | e Supplies Unli | | 595.13 | | 1.00 | | 04/04/2022 | N | KES001 |
| Issues | | INV00005 | 73 OFF001 | Office | e Supplies Unli | INV2004 | 35.7 | ZAR | 1.00 | 15.00 | 05/04/2022 | N | KES001 |
| | | | | | | 16 | | | | | | | |
| | | | | | | | | | | | | | |
| | | 4 | | | | | | | | | | | |



EDIT SALES INVOICE

- 1. From the Sales Invoices for Customer [customer code] screen,
- Ensure that the correct *Site* has been selected, by clicking on the *arrow* to change the *Site* filter.
 - The *Sales Invoices for Customer* listing screen will be updated with the Customer Invoices for the selected site.
- 3. Select the *row* of the Invoice you wish to edit.
- 4. Click on *Edit*.

Short cut key: *Right click* to display the Process *All groups* menu list. Click on *Edit*.

| Home Equipme | ent / Location | | | | rder W00006260 - BF | | | De Company v2.5 | | Reporting | Utilities | |
|----------------------------------|----------------------------|-------------|---------|---------------------|---------------------------------|--------------|----------|-----------------|---------|-------------|---------------|------------|
| Add Edit Comment ar Reference | | Save Layout | | aces Print | Send Invoices To Print Queue | Durban | - 4 | fresh | | | | |
| Maintain 3 | | For | mat | 4 | Print | | urrent | 4 | | | | 0 |
| inks # | Drag a col | | | | | 2 | | | | | | |
| nter text to search P | Invoice | No Custome | rCode C | CustomerName | InvoiceDescription | InvoiceValue | Currency | ExchangeRate | TaxRate | InvoiceDate | InvoiceStatus | SalesmanEr |
| Functions | 9 8 0 0 | 8 🖬 c | B | R C | a 🗖 c | - | s C | = | - | - | 4 0 0 | e 🗖 c |
| | INV000 | 0572 OFF001 | c | Office Supplies Unl | i QTMAR2 | 595.1 | 13 ZAR | 1.00 | 15.00 | 04/04/2022 | N | KES001 |
| Issues | INV000 | 0573 OFF001 | C | Office Supplies Unl | i INV2004 | 35.7 | 71 ZAR | 1.00 | 15.00 | 05/04/2022 | N | KES001 |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | 4 | | | | | | | | | | | |

- The Edit Customer Invoice [invoice number] screen will display. " on page 2
- Make the required changes to the *Heading Information*, *Addresses* or *Related References* tabs.



- 7. Make the required changes to the Invoice Item frame.
 - To Add a new Invoice item, click on the Select type text box of the first available item line.
 - To *remove* an item, click on the **row** of the item you wish to remove and click on *Delete Item*.
 - Drag and drop rows to set the order you wish the items to be displayed on the sales invoice. This order will directly be pulled into the printed invoice when generated.

| Home | Equipment / Loca | ations Cor | ntract Finance | e/HR Inven | | it Customer Invoi aintenance / Project | | | Version 2.5.0 Procurement | | | | ies | | | | _ | - |
|----------------|--------------------|--------------|-----------------|----------------|------------|---|--------------|---------------------------|------------------------------|------------|----------|------------------|--------------------|--------------|-------------|--------|---|------|
| | | 10012 | | | | | | | 1002 | | | (cpo: | ~~ | | | | | |
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| It | tem | ~ | | | | | | | | | | | | | | | | |
| Maintain | ⊿ Format | 4 | | | | | | | | | | | | | | | | |
| stomer Name | Hope Works (Pty) L | td | * م | Reference | Nova | | • | Billing add | | | | | | | | | | |
| Contact Name | Accounts Contact | | * ٩ | Status | New | | | PO Box 74 Forest Hills | | <u>^</u> ^ | | | | | | | | |
| Commercial | | | | Date & Time | 01/04/2022 | 2 🔻 13:34:34 | ¢ | New Town | | Ŧ | | | | | | | | |
| | Bianca Du Toit | | - * | | | | | Shipping a | ddress | Q | | | | | | | | |
| - | Hope Works (Pty) L | | | illing Contact | Accounts C | lontact | • ٩ | | | - | | | | | | | | |
| | South African Rand | | | change Rate | | | 1 🗘 * | | | | | | | | | | | |
| Tax Rate | 15.00 - | | 15 🗘 | | Suppre | ss Line Detail on I | Print | Addresses | Related Refer | ences | | | | | | | | |
| uppressOnPrint | ItemType | ItemCode | ItemDescription | InvoiceLineDes | scription | WarehouseName | BatchSeria | No Quanti | y UnitCost | Markup | Discount | UnitSellingPrice | BaseCcyPrice | TaxRate | Department | Status | | |
| | - | 8 0 0 | 4 0 4 | +OC | | * B ¢ | # E C | = | - | - | - | - | - | - | + 🛛 C | e@c | | |
| | Parts | | Chair | Chair | | Main Warehouse | | | 000 0.00 | | | 879.950 | 879.950 | | Sales Depar | | | |
| | Parts | | SP500 Black Ton | | oner | Main Warehouse | | | 000 0.00 | | | 540.000 | 540.000 | | Sales Depar | | | |
| | | | Delivery Fee | Delivery Fee | | | | | | | | | | | | | | |
| | Internal Service | | | | . 10/2002 | | | | 000 0.00 | | | 960.000 | 960.000 | | Sales Depar | _ | | |
| | | | 1 Year Supplier | 1 Year Supple | r Warra | | | | 000 0.00 | | 0.000 | 250.000 | 960.000 250.000 | | Sales Depar | _ | | |
| | Warranty | | | | r Warra | | | | | | | | | | | _ | | |
| mment | Warranty | | | | s Warra | | | | | | | | | 15.000 St | | _ | | 2,53 |

8. Click on Save.

For a detailed handling of this topic refer to Invoices - Edit Sales Invoice



| ф т — | 5- | | | | | 73 - BPO: Version | | | | | | | | |
|--|-------------------------------------|----------|-------------------------|------------------------------|--------|-------------------|--------------|-------------------------------------|----------------|-------------------------|------------------|--------------|------------------|--------------|
| | Equipment / Locat | | act Finance / H | R Inventory | Mainte | 6 | Manufacturin | g Procur | ement | Sales | Service | Reporting | Utilities | × 9 – |
| Customer Name Contact Name | | imited | + م + م | Reference Status | | | * | Billing ac PO Box 9 Forest Hi | 632 | | * م | 1 | | |
| | Type Class Comme Julanda Kessler | rcial | • | Date & Time | | | | Shipping 674 Night | addre | | به م | | | |
| Billing Customer | South African Rand | ł | • Ex | lling Contact change Rate | | | ָס 1 ‡ * | Forest Hi 1234 | ls | | | | | |
| Tax Rate SuppressOnPrint Y | 15.00 • ItemType | ItemCode | 15 C | InvoiceLineDe | | WarehouseName | BatchSerial | Addresses | _ | ated Refere UnitCost | nces Markup | Discount | UnitSellingPrice | BaseCcyPrice |
| • • • • • • • • • • • • • • • • • • • | Expenses Warranty Select type | TOLL | Toll 12 Month Suppli | Marianhill Ridg | | | -U- | | 1.000 1.000 | 27.000 0.000 | 15.000 15.000 | 0.000 | 31.050 | |
| | Julee oppen | | | | | | | | | | | | | |
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| • | | | | | | | | | | | | | | |
| Comment | | | | | * | | | | | | Sub | Total VAT | | 31.05 |
| Open Windows - | | | | | Ŧ | | | Harry Ad | - det | 05/04/202 | Grand | | Example Compan | 35.7 |

You will return to the updated *Sales Invoices for Customer* listing screen.

COMMENT AND REFERENCE

You will be able to <u>add</u> or <u>view</u> the Comment and Reference information for the Customer Invoice from the Work Order Listing Screen.

- 1. From the *Sales Invoices for Customer [customer code]* screen,
- Select the *row* of the Invoice you wish to add or view the Comment and Reference information for.
- 3. Click on *Comment and Reference*.

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



| ₽ ₹ | | Sales II | nvoices for Work Ord | | | | | | | | |
|-----------------------------------|----------------|----------------|----------------------|--------------------------|---------------|------------|-----------------|---------|-------------|---------------|-----------|
| Home Equipment | nt / Locations | Contract Fina | ance / HR Inventory | Maintenance / Proje | ects Manufact | turing Pro | ocurement Sales | Service | Reporting | Utilities | - 8 3 |
| Add Edit Comment and Reference | d View Sa | ave Layout Wor | | end Invoices Print Queue | Durban | | fresh | | | | |
| Maintain | • | Format | | Print . | 4 Cur | rent | 4 | | | | |
| Links # Enter text to search P | | | | | | | | | | | |
| nter text to search P | InvoiceNo | CustomerCode | CustomerName | InvoiceDescription | InvoiceValue | Currency | ExchangeRate | TaxRate | InvoiceDate | InvoiceStatus | SalesmanE |
| Functions | 9 REC | R C | R C | 8 C | = | s C | = | = | = | a 🛛 c | 8 C |
| | INV0000572 | OFF001 | Office Supplies Unli | QTMAR2 | 595.13 | ZAR | 1.00 | 15.00 | 04/04/2022 | N | KES001 |
| Issues | INV0000573 | OFF001 | Office Supplies Unli | INV2004 | 35.71 | ZAR. | 1.00 | 15.00 | 05/04/2022 | N | KES001 |
| | 2 | | | | | | | | | | |
| | 2 | | | | | | | | | | |
| | | | | | | | | | | 2 | |

- 4. "The Invoice No. [invoice number] comment maintenance screen will display." on page 2
- 5. Make the necessary changes to, or add the required information to the Reference or Comment fields.
- Click *OK* to update the Invoice information and to return to the *Sales Invoice for Customer* listing screen.

For a detailed handling of this topic refer to Invoices - Comment and References



| ⊕ ∓ | 4 | -> Invoi | ice No: INV0004 | 0573 comme | ent maintenance - BPO: | Version 2.5.0.8 - | Example Com | pany v2.5 | .0.8 | | | | x |
|----------------|--|-------------|-----------------|------------|------------------------|-------------------|-----------------|-----------|----------|--------------|------------|------------|--------|
| Home E | Equipment / Locations | Contract | Finance / HR | Inventory | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities | | 8 X |
| | | | | | | | | | | | | | |
| Ok Back | | | | | | | | | | | | | |
| Process | 6 | | | | | | | | | | | | \sim |
| Reference | INV2004 | | | | | | | | | | | | |
| | Additional equipment re | an irad for | | | | | | | | | | | |
| Comments | Additional equipment re installation. | equired for | ^ * | | | | | | | | | | |
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| Open Windows 🕶 | | | | | | 1 | Jser : JulandaK | 05/04/20 | 22 Versi | on : 2.5.0.8 | Example Co | mpany v2.5 | .0.8 |

VIEW CUSTOMER INVOICE

You will only be able to <u>view</u> and <u>print</u> the Invoice, <u>no</u> changes can be made in the *View* screen.

- 1. From the *Sales Invoices for Work Order [work order number]* screen,
- 2. Select the *row* of the Invoice you wish to view.
- 3. Click on *View*.



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| Issues | INV0000572 | | Office Supplies Unli | | 595.13 | | 1.00 | | 04/04/2022 | N | KES001 |
| Issues | INV0000573 | OFF001 | Office Supplies Unli | INV2004 | 35.71 | ZAR | 1.00 | 15.00 | 05/04/2022 | N | KES001 |
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- 4. The *View Customer Invoice [invoice number]* screen will display.
- 5. Note the *Comment and Reference Number* fields have been updated with the changes made, using the *Comment and Reference* button.
- 6. Click on *Back* to return to the *Sales Invoice for Customer* listing screen.

For a detailed handling of this topic refer to View Tax Invoice



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| C | ustomer Name | Office Supplies L | Unlimited | | | Reference | INV2004 | | • | Billing a | ddres | | | | | |
| | Contact Name | Samantha Times | | | • | Status | New | | ~ | PO Box | | | <u>ـ</u> | | | |
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| | Salesman | Julanda Kessler | | Ŧ | • | | | | 1 | Shippin | - | | | - | | |
| Bi | lling Customer | Office Supplies L | Unlimited | | • | Billing Contact | Samantha | Times | • | 674 Nig Forest I | | ive | * | | | |
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| | Tax Rate | | | 15 📜 | | | Suppr | ess Line Detail on | Print | Address | es Re | lated Refere | nces | | | |
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| Op | en Windows 🔻 | | | | | | | | | User : Ju | landaK | 05/04/20 | 22 Versio | n: 2.5.0.8 | Example Company | y v2.5.0.8 |

PRINT INVOICE

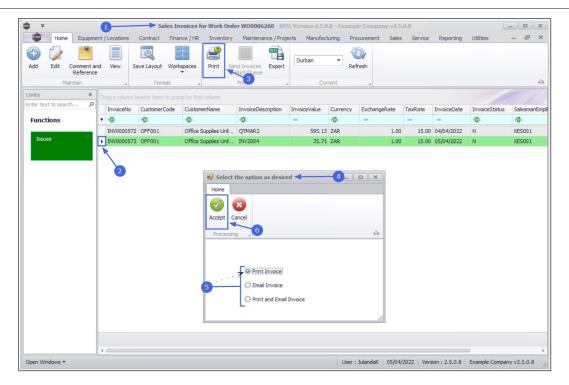
You will be able to *Print, Email* or *Print and Email* the Sales Invoice from the *Sales Invoices for Customer* listing screen or the *View Customer Invoice* screen.

- 1. From the Sales Invoices for Customer [customer code] screen,
- 2. Click on the *row* of the Invoice you wish to print.
- 3. Click on *Print*.
- 4. The *Select the option as desired message* will display.
- 5. Click on the *radio button* of the option you require.

When selecting *Email Invoice*, the invoice will be emailed via the *BPO Email Service* on the server and not from MS Outlook.

- The example has *Print Invoice* selected.
- 6. Click on Accept.





- 6. The Tax Invoice will display in the *Preview* screen.
- From here you can make cosmetic changes to the document, as well as Save, Print, Add a Watermark, Export or Email the Invoice.
- 8. Click on *Close* to return to the *Sales Invoices for Customer* screen.

Refer to <u>Proforma Invoice</u> and <u>Printing a Sales Invoice</u> for a detailed handling of the functions.



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| | | | Date : | 05/04/2022 00:00: | :00 | | |
| | | | Account Manager : | | | | |
| | | | Your Ref : Call Ref : | INV2004 | | | |
| | Sales Person : | Julanda Kessler | Machine No. : | | | | |
| | | Samantha Times | | SamanthaTimes | | | |
| | Attention : Cust Code : | OFF001 | Ship Contact | OFF001 | | | |
| | Customer : | Office Supplies Unlimited | | Office Supplies Unlimit | ted | | |
| | Billing Address : | PO Box 9632 | Shipping | 674 Nightwish Ave | | | |
| | Address : | Forest Hills | Address : | Forest Hills | | | |
| | | | | | | | |
| | | 12345 | | 1234 | | | |
| | Tel No. : | 031 789 4561 | Tel No. : | 031 789 4561 | | | |
| | Fax No. : | 031 789 4545 | Fax No. : | 031 789 4545 | | | |
| | VAT No. : | 987456321 | Email : | snenhlanhland∧ala ne@gmail.com | | | |
| | Item Code | Item Description | Quantity Unit | Price Discount % | Net Price | Total | |
| | TOLL | Marianhill Ridge, Toll to and from Custo | mer 1.00 | 31.05 .00 | 31.05 | 35.71 | |
| 4 | | Offices | | | | 1 | |
| Page 1 of 1 | | | | | | 100% (= | |
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SEND INVOICES TO PRINT QUEUE

You can send Invoices to the Print Queue directly from the *Sales Invoices for Customer* [customer code] listing screen, instead of going to the Print Queue Reprint screen. This means that a batch of invoices can be send to the customer.

Print Queue is only available where the status is set to Printed.

- 1. From the Sales Invoices for Customer [customer code],
- 2. Select the Invoice(s) you wish to send to the Print Queue.
 - To select a range of invoices: Click on the *row* of the first Invoice. Hold down the Shift key on your keyboard and click on the *row* of the *last invoice* in your list.



• To select alternate invoices: Hold down the Ctrl (Con-

trol) key on your keyboard and click on the *row* of each Invoice you wish to include in the selection.

- 3. Click on Send Invoices to Print Queue.
- 4. When you receive the *Print Queue Processing* message to confirm that;
 - The selected items have been sent to the print queue.
- 5. Click on OK.

For a detailed handling of this topic refer to Invoices - Send Invoices To Print Queue

| â - | 0 | Sales In | voices for Work Ord | er W00006260 - BP |): Version 2.5.0 |).8 - Examp | le Company v2.5 | .0.8 | | 6 | _ D X |
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| Links # Enter text to search_ | | | | | | | | | | | // |
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| Functions | INV0000572 | ADC | P⊡¢ Office Supplies Unli | 10: OTHADD | | R C | - 1.00 | - | 04/04/2022 | ×⊡⊂ P | ADC KES001 |
| Issues | INV0000572 | | Office Supplies Unli | | 35.71 | | 1.00 | | 04/04/2022 | P | KES001 |
| | 4 | | Print Queue Pro | selected items have b | een sent to the | print queue | × | | | | |
| Open Windows 🕶 | | | | | | User : | JulandaK 05/04/ | 2022 Vers | sion : 2.5.0.8 | Example Compar | y v2.5.0.8 |

ISSUES TILE

1. From the *Sales Invoices for Customer [customer code]* listing screen, you can view the stock issued for a selected Invoice.



- 2. Click on the *row* of the Invoice you wish to view the linked *issued items*.
- 3. Click on the *Issues* tile.

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| nter text to search P | InvoiceNo | CustomerCode | CustomerName | InvoiceDescription | InvoiceValue | Currency | ExchangeRate | TaxRate | InvoiceDate | InvoiceStatus | SalesmanEmplNo |
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| Issues | INV0000573 | OFF001 | Office Supplies Unli | INV2004 | 35.71 | ZAR | 1.00 | 15.00 | 05/04/2022 | P | KES001 |
| A | ▶ INV0000574 | OFF001 | Office Supplies Unli | INV2005 | 595.13 | ZAR | 1.00 | 15.00 | 05/04/2022 | N | KES001 |
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4. The *Issues for Sales Invoice: [invoice number]* listing screen will display.

Print Part Issue Note

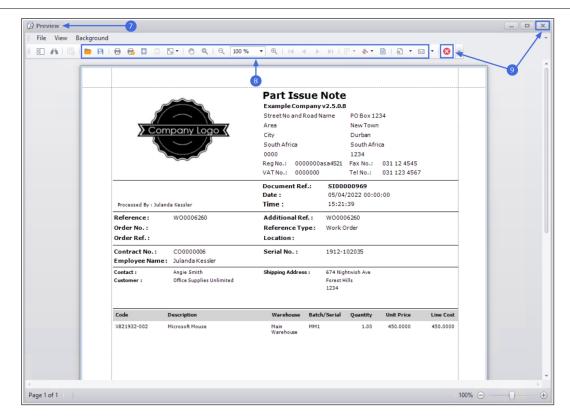
- 5. Click on the *row* of the Part Issue Note you wish to print.
- 6. Click on *Print*.



| h v | (| 4 | — Issues for Sal | es Invoice : INV0000574 | BPO: Version 2.5.0.8 - Example | Company v2.5.0.8 | | | | |
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- 7. The *Part Issue Note* for the Sales Invoice will display in the Preview screen.
- From here you can make cosmetic changes to the document, as well as Save, Print, Add a Watermark, Export or Email the Part Issue Note.
- 9. Click *Close* to return to the *Issues for Sales Invoice* screen.





MNU.072.029