

# **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					_ <b>D</b> 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	* <b>0</b> ¢
			. 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 <b>0</b> 0	PDC Office Supplies Unli	a 🗖 c		8 <b>0</b> ¢	- 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 <b>0</b> 0	R C	8 <b>0</b> 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	/					_ <b>– x</b>
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	=	* <b>D</b> 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 <b>0</b> 0	8 🖬 c	B	R C	a 🗖 c	-	s C	=	-	-	4 <b>0</b> 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	<ul> <li>INV000</li> </ul>	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:	~~					
••••	elete Save Lavor	ut																
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 <b>0</b> 0	4 <b>0</b> 4	+OC		* <b>B</b> ¢	# <b>E</b> 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													
•														
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



<b>⊕ ∓</b>	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	^ <b>*</b>										
					-								
					-5								
			~										
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*.



			voices for Work Ord								
Home Equipme	nt / Locations	Contract Fina	nce / HR Inventory	Maintenance / Proj	ects Manufact	uring Pro	ocurement Sales	Service	Reporting	Utilities	- 8 3
Add Edit Comment ar Reference	nd View Sa	we Layout Work		Print Queue	Durban	Ref	fresh				
inks 4	4	Jilliat	4	Print	un Cun	rent	4				
nter text to search P											/
		CustomerCode	CustomerName	InvoiceDescription		Currency	ExchangeRate	TaxRate	InvoiceDate	InvoiceStatus	SalesmanE
Functions		R <b>O</b> C	R <b>O</b> C	R <b>O</b> C	=	soc.	=	=	=	#BC	R C
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
	2										
	2										
	2										
	2									2	

- 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



\$	Ŧ	4						573 - BPO: Version								
E	Home Home Sack Save La Forma	yout Print	cations Cont	tract	Finance /	(HR Inventory	Mainte	mance / Projects	Manufacturin	g Proci	rement	Sales	Service	Reporting	Utilities	- 8 ×
C	ustomer Name	Office Supplies L	Unlimited			Reference	INV2004		•	Billing a	ddres					
	Contact Name	Samantha Times			•	Status	New		~	PO Box			<u>ـ</u>			
	Commercial	Type Class Com	mercial	Ť	•	Date & Time	05/04/202	22 - 14:01:39	<b>;</b>	Forest	1IIS		*			
	Salesman	Julanda Kessler		Ŧ	•				1	Shippin	-			-		
Bi	lling Customer	Office Supplies L	Unlimited		•	Billing Contact	Samantha	Times	•	674 Nig Forest I		ive	*			
In	voice Currency	South African Ra	and	Υ.	E	Exchange Rate			1 🗘 🍍	1234			*			
	Tax Rate			15 📜			Suppr	ess Line Detail on	Print	Address	es Re	lated Refere	nces			
	SuppressOnPrint	ItemType	ItemCode	ItemDe	escription	InvoiceLineDe	scription	WarehouseName	BatchSerial	No Qua	ntity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice
۴	a 🖬 c	a <b>n</b> c	a 🗖 c	*Oc		8 🗖 C		n 🗖 c	a∎c	-		-	-	-	-	-
۲	No	EXPS	TOLL	Toll		Marianhill Ridg					1.000	27.000	15.000	0.000	31.050	31.0
	No	WARR	12MSW	12 Mor	nth Suppli	i 12 Month Supp	plier War				1.000	0.000	15.000	0.000	0.000	0.00
			5													
-	mment Additio	nal equipment re	quired for instal	lation									cub	Total		31.05
0	And the source of the source o	and a spagement (16)	40										500	VAT		4.66
							-						Grand			4.00
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**

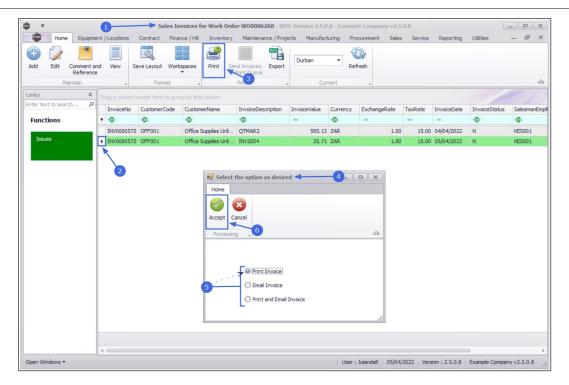
You will be able to *Print, Email* or *Print and Email* the Sales Invoice from the *Sales Invoices for Customer* listing screen or the *View Customer Invoice* screen.

- 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.



Preview	6						_ <b>_ x</b>
File View Backgr	round						7 -
80 🗥   88   🖿	🔒 🔒 🔂 🗉 🗉	🔊 · 🖱 🔍 🔍 100 % ·	• • •	▶    !!! • ♦ • 🛽	1 🗗 🕶 🖂	3 - 🔕 👞	
_		<b>↓</b>					8
			Tax In	voice		Page 1 of 1	
	50		Example Comp	any y2 5 0 8			
	21		Street No and Road Na		34		
	Com	pany Logo 🎸	Area	New Town			
	4	/>	City	Durban			
	5		South Africa 1234	South Afri 1234	ca		
	-		Reg No.: 0000000as		031 12 4545		
			VAT No.: 0000000	Tel No.:	031 123 4567		
			Document Ref.:	INV0000573			
			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% (=	

## 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 <del>-</del>	0	Sales In	voices for Work Ord	er W00006260 - BP	): Version 2.5.0	).8 - Examp	le Company v2.5	.0.8		6	_ <b>D</b> X
	nt / Locations		nce / HR Inventory						Reporting	Utilities	- & ×
Add Edit Comment ar Reference	nd View Si	ave Layout Works	spaces Print Se To	nd Invoices Print Queue	Durban		<b>W</b> resh				
Maintain		Format	4	Print	Cu	rrent					~
Links # Enter text to search_											//
2	InvoiceNo	CustomerCode	CustomerName	InvoiceDescription	InvoiceValue	Currency	ExchangeRate	TaxRate	InvoiceDate	InvoiceStatus	SalesmanEmpl
Functions	<ul> <li>INV0000572</li> </ul>	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.

Home Equipm	ent / Locations		ance / HR Invento					Sales Se	rvice Repo	rtina Utilities	#
Add Edit Comment ar Reference	nd View Sar	IVE Layout Work	spaces Print Se	end Invoices Print Queue	Durban		fresh		ince hepo	ang contes	
Maintain	4	Format	4	Print	a Cur	rent					
inks 4 nter text to search P											
nter text to search P	InvoiceNo	CustomerCode	CustomerName	InvoiceDescription	InvoiceValue	Currency	ExchangeRate	TaxRate	InvoiceDate	InvoiceStatus	SalesmanEmplNo
Functions	Y 100	* <b>0</b> ¢	R <b>O</b> C	10×	-	n 🖬 c	-	-	-	n 🗖 c	* <b>0</b> ¢
	INV0000572	OFF001	Office Supplies Unli	QTMAR2	595.13	ZAR	1.00	15.00	04/04/2022	Р	KES001
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
3	2										
3											
3											

4. The *Issues for Sales Invoice: [invoice number]* listing screen will display.

#### **Print Part Issue Note**

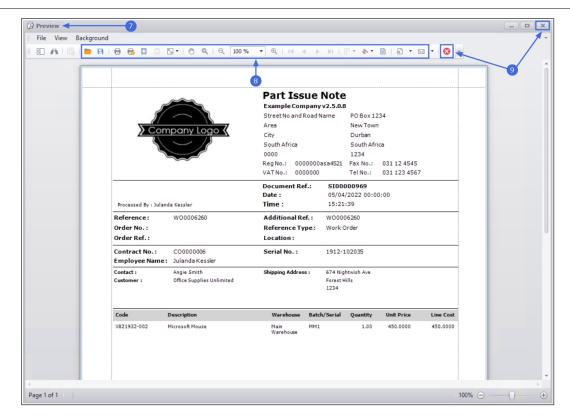
- 5. Click on the *row* of the Part Issue Note you wish to print.
- 6. Click on *Print*.



h v	(	4	— Issues for Sal	es Invoice : INV0000574	BPO: Version 2.5.0.8 - Example	Company v2.5.0.8				
Home	_	-			e / Projects Manufacturing P		rvice Reportin	ng Utilities	- 6	
	yout Workspace	es Print Exp								6
rag a column head			A						1	/
DocNo	DocType	EventDate	PartCode	PartDesc	WarehouseName	BinLocationName	SerialNo	UnitCost	Quantity	Va
1 <b>0</b> 0	# <b>0</b> ¢	-	* <b>D</b> ¢	10c	10c	* <b>D</b> :	#IIC	-	=	-
SI00000969	ISSUE	05/04/2022	X821932-002	Microsoft Mouse	Main Warehouse	DBN-A1	MM1	450.000	1.00	D
5										
•										

- 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