

SALES

ORDERS - PRINT / EMAIL SALES ORDER

When using the **Email** option to send a Sales Order, please note that it will be mailed via the BPO Email Service on the server and not from your own MS Outlook.

Ribbon Access: Sales > Orders



- 1. The *Sales Orders* listing screen will be displayed.
- 2. Select the *Site* where the Sales Order is located.
 - The example has *Durban* selected.
- 3. Select the *Status*.
 - The image has *New Order* selected.
- 4. Select the *row* of the Sales Order that you wish to *print*.
- 5. Click on *Print Sales Order*.



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|---|-----------|-------------|-------------------------|-----------------|------------------------------|-------------|--------------|----------------------|---------------------------|--------------|--------|--------------|--------------|--|
| A | dd Edit | Delete View | Forward Creat | | Items New Deal WO Project | Save Layout | Vorkspaces | Print Sales Order | Print Proforma Invoice | Export New | order | | | |
| | Main | tain | "Navigati " | Process | | Format | | - | Print | | Currer | nt | | |
| 1 | | | | | | | | | | 3 | | | | |
| Í | | | | | | | | | | | | | 1 | |
| | OrderNo | | CustomerName | OrderStatusDesc | OrderDescription | OrderValue | | OrderDate | SalesmanName | ExchangeRate | | OrderTime | DeptCode | |
| Ļ | * 🗖 C | 8 C | * 0 ¢ | a 🗖 c | ROC | - | N O C | - | R ⊡ C | - | - | R ⊡ C | R O C | |
| н | OR0000207 | NET001 | Networking and Lapto | | test | 564.30 | | 03/08/2017 | Bianca Du Toit | 1.00 | | 01:10:42 | | |
| н | OR0000218 | TIN001 | Tinas Coffee Shop | New order | test | 24,071.10 | | 14/08/2017 | Bianca Du Toit | 1.00 | | 11:18:17 | | |
| н | OR0000220 | BET0001 | Betties Summer Shop | | 1234 | 23,029.07 | | 21/08/2017 | Bianca Du Toit | 1.00 | | 11:49:29 | | |
| н | OR0000221 | HOP001 | Hope Works (Pty) Ltd | New order | | 4,745.59 | | 04/09/2017 | Bianca Du Toit | 1.00 | | 14:49:36 | | |
| 4 | OR0000222 | SAM001 | Samanthas Diner | New order | test | 402.85 | | 04/09/2017 | Bianca Du Toit | 10.00 | | 02:50:18 | | |
| Ľ | OR0000244 | HOP001 | Hope Works (Pty) Ltd | New order | test | 993.60 | ZAR | 09/04/2018 | Bianca Du Toit | 1.00 | 15.00 | 10:18:06 | | |
| | OR0000251 | HOP001 | Hope Works (Pty) Ltd | New order | test | 575.00 | ZAR | 23/04/2018 | Bianca Du Toit | 1.00 | 15.00 | 02:58:26 | | |
| | OR0000257 | DER001 | Derton / Technologies | New order | | 6,119.52 | ZAR | 21/05/2018 | Bianca Du Toit | 1.00 | 14.00 | 14:16:30 | | |
| | OR0000281 | TIA001 | Titan Group | New order | Copy of test | 920.00 | ZAR | 09/01/2019 | Bianca Du Toit | 1.00 | 15.00 | 16:47:51 | | |
| | OR0000282 | HOP001 | Hope Works (Pty) Ltd | New order | 1234 | 920.00 | ZAR | 09/01/2019 | Bianca Surend | 1.00 | 15.00 | 04:48:13 | | |
| | OR0000283 | HOP001 | Hope Works (Pty) Ltd | New order | test | 0.00 | ZAR | 09/01/2019 | Bianca Surend | 1.00 | 15.00 | 04:50:21 | | |
| | OR0000284 | HOP001 | Hope Works (Pty) Ltd | New order | 1234 | 0.00 | ZAR | 09/01/2019 | Bianca Surend | 1.00 | 15.00 | 04:51:52 | | |
| | OR0000285 | BEA001 | Bearing and Shoe | New order | TestQuoteStatus | 1,104.00 | ZAR | 09/01/2019 | Bianca Surend | 1.00 | 15.00 | 04:58:22 | | |
| | OR0000286 | BEA001 | Bearing and Shoe | New order | quotereftest | 0.00 | ZAR | 09/01/2019 | Bianca Surend | 1.00 | 15.00 | 04:59:34 | | |
| | OR0000287 | APP0001 | Apple Juice Inc | New order | 8745 | 993.60 | ZAR | 09/01/2019 | Bianca Surend | 1.00 | 15.00 | 05:06:46 | | |
| | OR0000297 | NEW 101 | New Customer Test | New order | test | 150.00 | ZAR | 17/09/2019 | Bianca Du Toit | 1.00 | 15.00 | 10:46:59 | | |
| | OR0000300 | HOP001 | Hope Works (Pty) Ltd | New order | test | 241,500.00 | ZAR | 07/04/2020 | Kame Pillay | 1.00 | 15.00 | 12:31:21 | | |
| | OR0000303 | PIN0001 | Pink Shoes | New order | Test email | 241,895.60 | ZAR | 09/04/2020 | Kame Pillay | 1.00 | 15.00 | 16:35:25 | | |
| | OR0000304 | OFF001 | Office Supplies Unlimit | New order | test 1 | 12,333.75 | ZAR | 14/04/2020 | Sne Ndwalane | 1.00 | 15.00 | 10:27:06 | | |
| | OR0000305 | PAN001 | Panda Copiers | New order | Test | 854.00 | USD | 14/04/2020 | Kame Pillay | 10.00 | 0.00 | 11:59:51 | | |

- The Select the option as desired screen will display with the following options;
 - Print Order (will open the Order in Report Preview to view, print, export or email)
 - Email Order (can attach documents, add recipients, the

system will create a .pdf and email the Order)

• Print and Email Order (both the Report Preview and

Email screens will pop up)

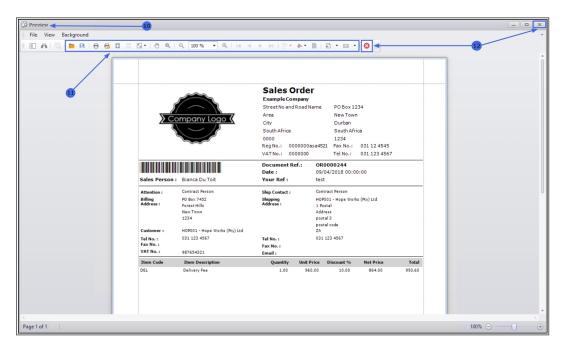
PRINT SALES ORDER

- 7. Click on the *Print Order* radio button.
- 8. Click on *Accept*.



| 6 | Hom | e Equipment | /Locations Contract | Finance / HR | | ance / Projects | Manuta | cturing Pro | curement Sale | | Reporting | Utilities | - 8 |) |
|---|-----------|-------------|-------------------------|-----------------|------------------|-------------------|------------|----------------------|---------------------------|--------------|-----------|-----------------------------|----------|---|
| | | | | | | ESS | | | | | | GV | | |
| A | dd Edit | Delete View | Forward Creat | | WO Project | Save Layout | Norkspaces | Print Sales Order | Print Proforma Invoice | Export Ne | v order | Refresh | | |
| | Main | tain | " Navigati " | Process | | Forma | t | 4 | Print | 4 | Currer | nt | | - |
| | | | | | | | | 6 | | | | | | |
| | OrderNo | | CustomerName | OrderStatusDesc | OrderDescription | OrderValue | Currency | OrderDate | SalesmanName | ExchangeRate | TayRate | OrderTime | DeptCode | |
| | | REC CODE | ADC | *Dc | RDc | | Currency | | | | | R | RDC | |
| | OR0000207 | NET001 | Networking and Lapto | - | test | 564.30 | 740 | 03/08/2017 | Bianca Du Toit | 1.0 | 14.00 | 01:10:42 | | |
| | OR0000218 | TIN001 | Tinas Coffee Shop | New order | test | 24.071.10 | | 14/08/2017 | Bianca Du Toit | 1.0 | | 11:18:17 | | |
| | OR0000220 | BET0001 | Betties Summer Shop | | 1234 | 23.029.07 | | 21/08/2017 | Bianca Du Toit | 1.0 | | 11:49:29 | | |
| | OR0000221 | HOP001 | Hope Works (Pty) Ltd | New order | Select the op | tion as desired | d | _ | | 1.0 | | 14:49:36 | | |
| | OR0000222 | SAM001 | Samanthas Diner | New order | Home | | | | t | 10.0 | 0.00 | 02:50:18 | | |
| • | OR0000244 | HOP001 | Hope Works (Pty) Ltd | New order | | | | | it | 1.0 | 15.00 | 10:18:06 | | |
| | OR0000251 | HOP001 | Hope Works (Pty) Ltd | New order | S 20 1 | | | | it | 1.0 | 15.00 | 02:58:26 | | |
| | OR0000257 | DER001 | Derton / Technologies | New order | Accept Cancel | | | | it | 1.0 | 14.00 | 14:16:30 | | |
| | OR0000281 | TIA001 | Titan Group | New order | Pocessing | | 8 | | ⇔ it | 1.0 | 15.00 | 16:47:51 | | |
| | OR0000282 | HOP001 | Hope Works (Pty) Ltd | New order | Fricessing a | / | ~ | | d | 1.0 | 15.00 | 04:48:13 | | |
| | OR0000283 | HOP001 | Hope Works (Pty) Ltd | New order | | | | | d | 1.0 | 15.00 | 04:50:21 | | |
| | OR0000284 | HOP001 | Hope Works (Pty) Ltd | New order | | × | | | d | 1.0 | 15.00 | 04:51:52 | | |
| | OR0000285 | BEA001 | Bearing and Shoe | New order | 9 0 | Print Order | | | d | 1.0 | 15.00 | 04:58:22 | | |
| | OR0000286 | BEA001 | Bearing and Shoe | New order | 0 | Email Order | | 7 | d | 1.0 | 15.00 | 04:59:34 | | |
| | OR0000287 | APP0001 | Apple Juice Inc | New order | Ĭ | | | | d | 1.0 | 15.00 | 05:06:46 | | |
| | OR0000297 | NEW 101 | New Customer Test | New order | 0 | Print and Email (| Order | | it | 1.0 | 15.00 | 10:46:59 | | |
| | OR0000300 | HOP001 | Hope Works (Pty) Ltd | New order | | | | | | 1.0 | 15.00 | 12:31:21 | | |
| | OR0000303 | PIN0001 | Pink Shoes | New order | | | | | | 1.0 | 15.00 | 16:35:25 | | |
| | OR0000304 | OFF001 | Office Supplies Unlimit | New order | test 1 | 12,333.75 | ZAR | 14/04/2020 | Sne Ndwalane | 1.0 | 15.00 | 10:27:06 | | |
| | OR0000305 | PAN001 | Panda Copiers | New order | Test | 854.00 | USD | 14/04/2020 | Kame Pillay | 10.0 | 0.00 | 11:59:51 | | |
| | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |

- 10. The *Report Preview* screen will display.
- You can make cosmetic changes to your document as well as *Save*,
 Print, *Add a Watermark*, *Export* or *Email* the Sales Order.
- 12. Close the Report Preview screen when done.





You will return to the *Sales Orders* listing screen.

EMAIL INVOICE / PRINT AND EMAIL SALES ORDER

 \times 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.

- From the Select the option as desired screen, select Email Order or Print and Email Order.
 - The example has *Email Order* selected.

| | Hom | ne Equipment | /Locations Contra | ct Finance / HR | Inventory Mai | intenance / Proje | cts Ma | nufacturing | Procurement | | Service | Reporti | ng Utilitie | es – | · 6) |
|---|--------------|--------------|-------------------------|-----------------|----------------------|-------------------|--------------|----------------------|--|--------|-----------|---------|---------------|----------|---------|
| 6 | Ð 💋 | × | | | € 🔒 | 23 | | P | e se | | Durban | • | · 2 | | |
| A | dd Edit | Delete View | Forward Cre | | d Items New Deal | Save Layout | Vorkspaces | Print Sales Order | Print Proforma Invoice | Export | New order | • | Refresh | | |
| | Main | tain | A Navigati | Process | | Format | | order | Print | | (| urrent | | | 6 |
| - | | | -11 | | - | | | - | | | | | | | |
| | | | | | | | | | | | | | | | 1 |
| | OrderNo | | CustomerName | OrderStatusDesc | | OrderValue | | OrderDate | SalesmanName | - | Rate TaxR | | OrderTime | DeptCode | DeptNam |
| ۴ | REC | 1 0 0 | 8∎c | R C | 8 🛛 C | - | R O C | - | R C | - | - | | 0 ¢ | A C | a 🖬 c |
| | OR0000207 | NET001 | Networking and Lapto | New order | test | 564.30 | ZAR | 03/08/2017 | Bianca Du Toit | | 1.00 1 | 4.00 0 | 1:10:42 | | |
| | OR0000218 | TIN001 | Tinas Coffee Shop | | the option as desire | ed | _ | | Bianca Du Toit | | 1.00 | | 1:18:17 | | |
| | OR0000220 | BET0001 | Betties Summer Shop | Home | | | | | Bianca Du Toit | | | | 1:49:29 | | |
| | OR0000221 | HOP001 | Hope Works (Pty) Ltd | New | ~ | <hr/> | | | Bianca Du Toit | | 1.00 | 14.00 | 4:49:36 | | |
| | OR0000222 | SAM001 | Samanthas Diner | New 🥑 🛛 | 8 | | | | Bianca Du Toit | 1 | 10.00 | 0.00 0 | 2:50:18 | | |
| ۲ | OR0000244 | HOP001 | Hope Works (Pty) Ltd | New Accept C | ancel | | | | Bianca Du Toit | | 1.00 1 | 15.00 1 | 0:18:06 | | |
| | OR0000251 | HOP001 | Hope Works (Pty) Ltd | New | | | 1 | | Bianca Du Toit | | 1.00 | 15.00 0 | 2:58:26 | | |
| | OR0000257 | DER001 | Derton / Technologies | New Cocessir | g 4 | | | ~ | Bianca Du Toit | | 1.00 1 | 14.00 | 4:16:30 | | |
| | OR0000281 | TIA001 | Titan Group | New | | 1 | | | Bianca Du Toit | | 1.00 1 | 15.00 1 | 6:47:51 | | |
| | OR0000282 | HOP001 | Hope Works (Pty) Ltd | New | | 1 | | | Bianca Surend | | 1.00 1 | 15.00 0 | 4:48:13 | | |
| | OR0000283 | HOP001 | Hope Works (Pty) Ltd | New | O Print Order | 1 | | | Bianca Surend | | 1.00 | 15.00 0 | 4:50:21 | | |
| | OR0000284 | HOP001 | Hope Works (Pty) Ltd | New | | _ | | | Bianca Surend | | 1.00 1 | 15.00 0 | 4:51:52 | | |
| | OR0000285 | BEA001 | Bearing and Shoe | New | Email Order | V | | | Bianca Surend | | 1.00 | 15.00 0 | 4:58:22 | | |
| | OR0000286 | BEA001 | Bearing and Shoe | New | Print and Email | Order | | | Bianca Surend | | 1.00 1 | 15.00 0 | 4:59:34 | | |
| | OR0000287 | APP0001 | Apple Juice Inc | New | | | | | Bianca Surend | | 1.00 | 15.00 0 | 5:06:46 | | |
| | OR0000297 | NEW 101 | New Customer Test | New | | | | | Bianca Du Toit | | 1.00 1 | 15.00 1 | 0:46:59 | | |
| | OR0000300 | HOP001 | Hope Works (Pty) Ltd | New order | test | 241,500.00 | ZAR | 07/04/2020 | Kame Pillay | | 1.00 | 15.00 1 | 2:31:21 | | |
| | OR0000303 | PIN0001 | Pink Shoes | New order | Test email | 241,895.60 | ZAR | 09/04/2020 | Kame Pillay | | 1.00 1 | 15.00 1 | 6:35:25 | | |
| | OR0000304 | OFF001 | Office Supplies Unlimit | New order | test 1 | 12,333.75 | ZAR | 14/04/2020 | Sne Ndwalane | | 1.00 1 | 15.00 1 | 0:27:06 | | |
| | OR0000305 | PAN001 | Panda Copiers | New order | Test | 854.00 | USD | 14/04/2020 | Kame Pillay | 1 | 10.00 | 0.00 1 | 1:59:51 | | |
| | OR0000308 | TIA001 | Titan Group | New order | MRTEst | 885.50 | ZAR | 22/04/2020 | Marc Repsold | | 1.00 1 | 15.00 1 | 2:38:44 | | |
| | | | | | | | | | | | | | | | |
| 4 | | | | | | | | | | | | | | | |
| f | en Windows 🔻 | | | | | | | | | | | | on : 2.4.0.11 | 1 | |

2. Click on *Accept*.

3. The *Email Sales Order: OR[order number]* screen will display, for both Email Invoice or Print and Email Invoice options.



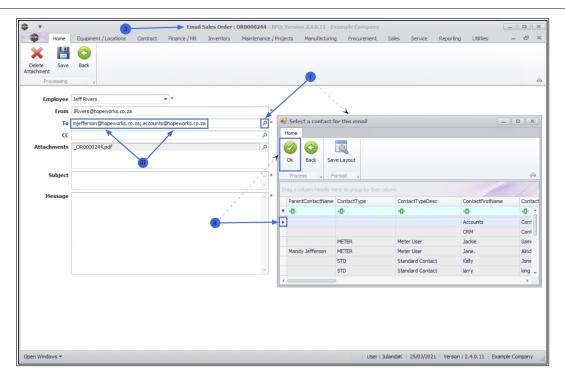
Email Header Information

- **Employee:** The employee who is currently logged onto the system, will display in the employee field. Click on the drop-down **arrow** to choose an alternative employee name, if required.
- From: The email address for the employee, selected above in the employee field above, will display. This field can be edited if so required.

Searching for and Adding a second email address

- **To:** This field will auto populate with the email address of the contact person at the customer. To choose an alternative email or to add a second 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 contact you wish to add and click on *OK*.
 - iii. To add an additional contact person, click on the *search* button to select and add the contact to the email. The second email address will be separated with a [;], e.g. *mjefferson@hopeworks.co.za; accounts@hopeworks.co.za*.
- **CC:** If a group email address has been set up on the order or accounts contact, then the group email address will display here.





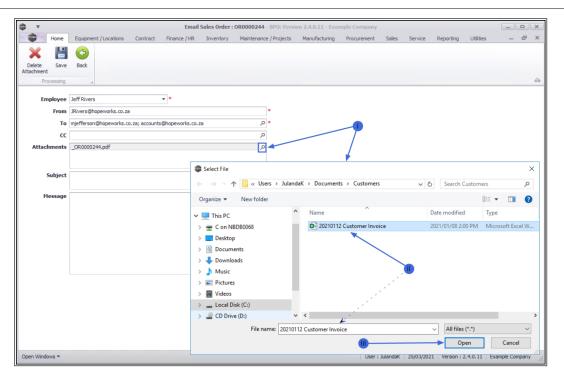
Email Attachments

• 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.

- To add additional documents to be emailed, click on the search button in the Attachments field to display the Select File screen.
- ii. *Browse* to find the file location then click on the file you wish to attach.
- iii. Once you have selected the file, click on Open.





The attachment will display in the *Attachments* field.

Delete an Attachment

You may choose to remove an attached document.

- 1. Click on the *attachment* you wish to remove.
- 2. Click on *Delete Attachment*.



| \$ = | | | Email | Sales Order : | OR0000244 - BPO: Versi | on 2.4.0.11 - Exa | nple Company | | | | | | |
|----------------------|--|----------------|-----------------|---------------|------------------------|-------------------|--------------|----------|-----------|---------------|------------|-------------|----------|
| Home | Equipment / Locations | Contract | Finance / HR | Inventory | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities | - | ₽ x |
| Delete Attachment | Back | | | | | | | | | | | | \$ |
| Employee | Jeff Rivers | | • | | | | | | | | | | |
| From | JRivers@hopeworks.co.za | 3 | | | • | | | | | | | | |
| То | mjefferson@hopeworks.c | o.za; accounts | @hopeworks.co.; | a | * م | | | | | | | | |
| cc | | | | | م | | | | | | | | |
| Attachments | OR0000244.pdf 20210112 Customer Invoi | ce.xlsx | | | | | 1 | | | | | | |
| Subject | | | | | * | | | | | | | | |
| Message | | | | | | | | | | | | | |
| Open Windows 🕶 | | | | | | | User : | JulandaK | 25/03/202 | 1 Version : 3 | 2.4.0.11 E | Example Con | npany // |

Email Subject and Message

1. **Subject**: Click in the text box to type a subject line for the email.

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

- 2. Message: Click in the text box to type the email text message.
- 3. Once you have finished entering the relevant information, click on *Save*.



| ф т | | | Email | Sales Order : | OR0000244 - BPO: Versi | on 2.4.0.11 - Exam | nple Company | | | | | | x |
|-------------------|-----------------------------|-----------------|--------------------|-----------------|------------------------|--------------------|--------------|----------|------------|----------------|-----------|-------------|------------|
| Home | Equipment / Locations | Contract | Finance / HR | Inventory | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting L | Itilities | - 6 | × |
| Delete Attachment | George Back | | | | | | | | | | | | |
| Processing | 3 | | | | | | | | | | | | \diamond |
| Employee | Jeff Rivers | | * * | | | | | | | | | | |
| | JRivers@hopeworks.co.za | | | | | | | | | | | | |
| | mjefferson@hopeworks.co | | | | * 0 | | | | | | | | |
| | accounts@hopeworks.co.; | | | | م | | | | | | | | |
| | _OR0000244.pdf | | | | 2 | | | | | | | | |
| | | | | | | | | | | | | | |
| Subject | Ref: PO: HW250 - Order | for Toner Kit | | | ÷ | | -1 | | | | | | |
| Message | Dear Mandy, | | | | * | | | | | | | | |
| | Attached please find your | Sales Order f | or the 2 x Toner K | ts you have pla | ced. | | | | | | | | |
| | Delivery will be made withi | n 3 working d | ays. | | | | | | | | | | |
| | Please note our Terms and | d Conditions fo | or Returns. | | | | _2 | | | | | | |
| | Kind Regards | | | | | | | | | | | | |
| | Jeff Rivers | | | | ~ | | | | | | | | |
| | | | | | | | | | | | | | |
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| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| Open Windows 🕶 | | | | | | | User : | JulandaK | 25/03/2021 | Version : 2.4. | 0.11 E | ample Compa | ny // |

You will return to the *Sales Orders* listing screen.

Related Topics

- Add a Sales Order
- Print Pro-Forma Invoice
- Create Sales Invoice from Sales Order
- <u>Create New Deal Sale / Rental (creates a call)</u>
- <u>Create New Deal Project Sale / Rental</u>

MNU.126.003