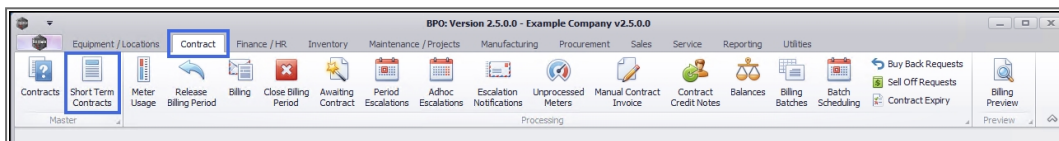


CONTRACTS

SHORT TERM CONTRACT - PRINT DEPOSIT AND FINAL INVOICE

Ribbon Access: *Contract > Short Term Contracts*



- The **Short Term Contract Listing** screen will be displayed.
- Ensure that you have selected the correct **site** and that the **status** is set to **Active**.

Short Term Contract Listing - BPO: Version 2.1.0.63 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Close Machine Return WO's Short Term Invoice Save Layout Workspaces Save Filter Print Durban Active Refresh

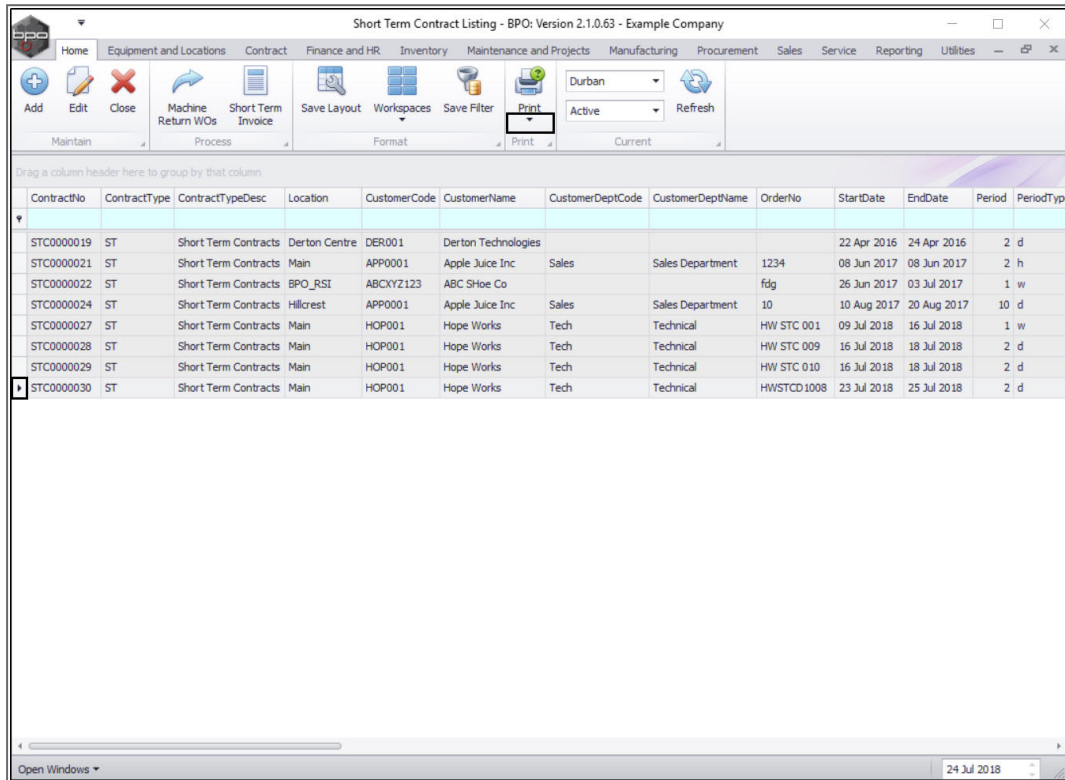
Drag a column header here to group by that column

ContractNo	ContractType	ContractTypeDesc	Location	CustomerCode	CustomerName	CustomerDeptCode	CustomerDeptName	OrderNo	StartDate	EndDate	Period	PeriodType
STC0000019	ST	Short Term Contracts	Derton Centre	DER001	Derton Technologies				22 Apr 2016	24 Apr 2016	2 d	
STC0000021	ST	Short Term Contracts	Main	APP001	Apple Juice Inc	Sales	Sales Department	1234	08 Jun 2017	08 Jun 2017	2 h	
STC0000022	ST	Short Term Contracts	BPO_RSI	ABCXYZ123	ABC Shoe Co			fdg	26 Jun 2017	03 Jul 2017	1 w	
STC0000024	ST	Short Term Contracts	Hillcrest	APP001	Apple Juice Inc	Sales	Sales Department	10	10 Aug 2017	20 Aug 2017	10 d	
STC0000027	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 001	09 Jul 2018	16 Jul 2018	1 w	
STC0000028	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 009	16 Jul 2018	18 Jul 2018	2 d	
STC0000029	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 010	16 Jul 2018	18 Jul 2018	2 d	

Open Windows 24 Jul 2018

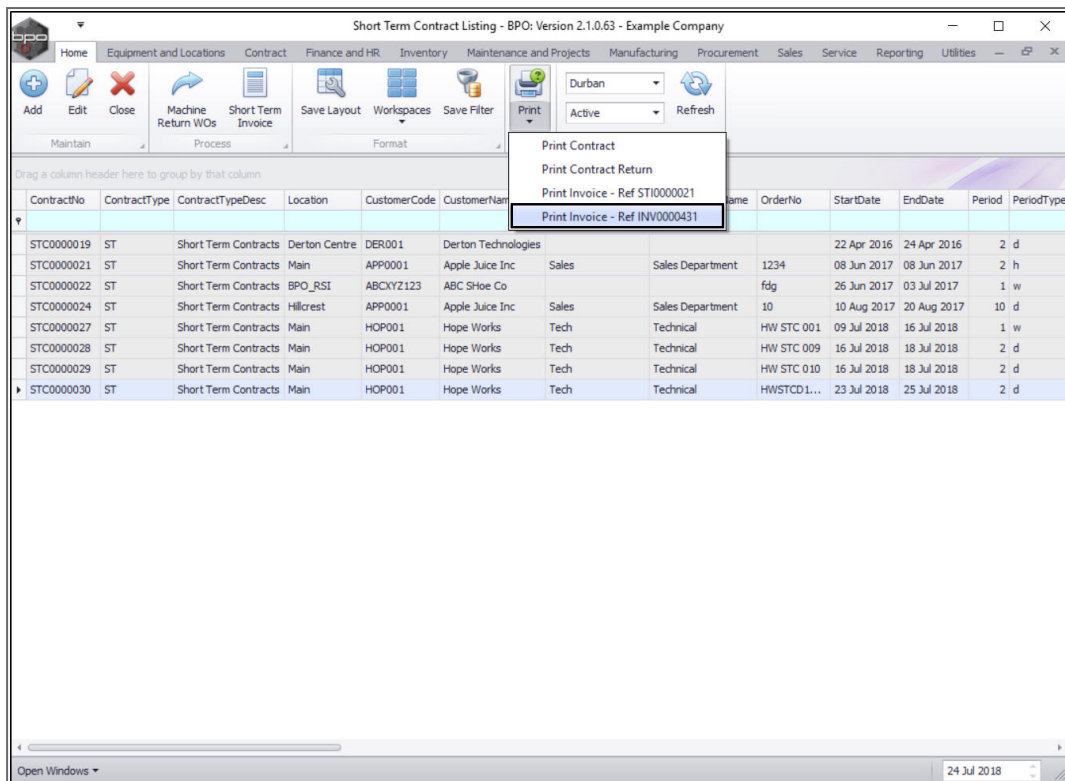
PRINT SHORT TERM CONTRACT DEPOSIT INVOICE

- Select the **row** of the **short term contract** where you wish to **print** the deposit invoice.
- Click on the drop-down **arrow** on the **Print** button.



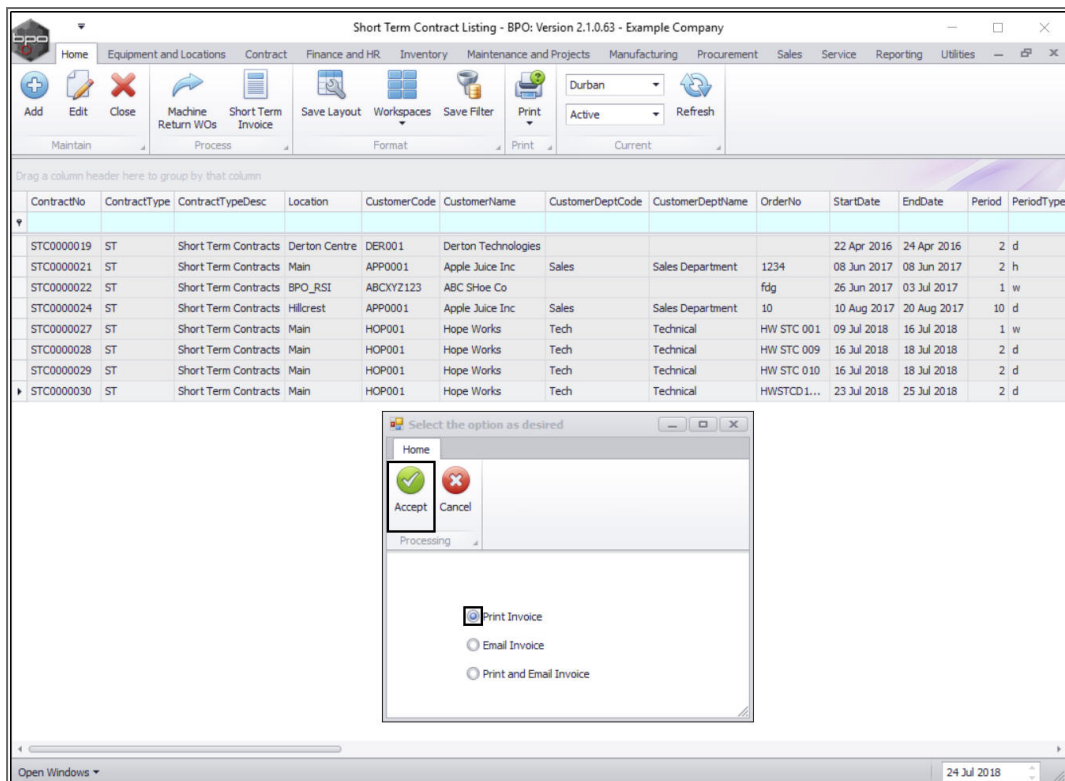
- Select **Print Invoice - Ref []** from the drop-down list.

Note: You will be able to distinguish between the **Deposit** Invoice and the **Short Term** Invoice by the **invoice reference numbers** set up in the Configurator.



SELECT PRINT OPTION

- A **Select the option as desired** screen will pop up with the following options;
 - **Print** : will open the Deposit Invoice in Report Preview to view, print, export or email.
 - **Email**: can attach documents, add recipients, the system will create a pdf and email the Deposit Invoice.
 - **Print/Email**: both the Report Preview and Email screens will pop up.
- Click on the **radio button** in front of the option you want.
- Click on **Accept**.



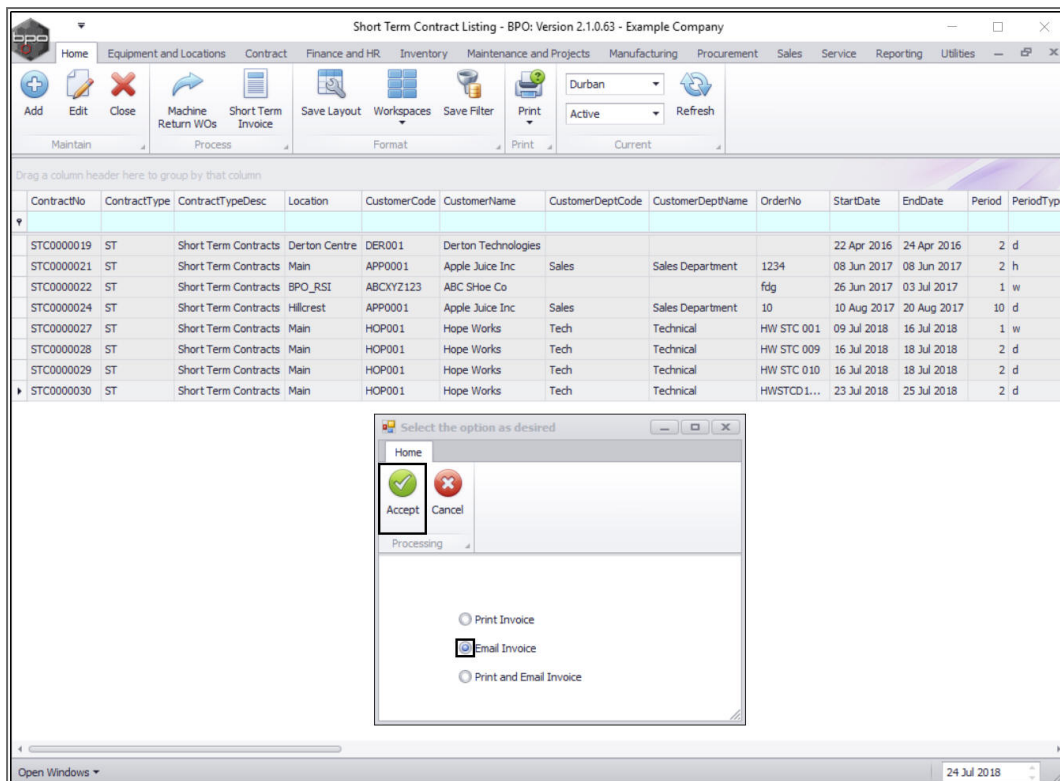
- The **Report Preview** screen will come up, where **Print** or **Print and Email** is selected
- From here you can **view**, **print**, **export** or **email** the Deposit Invoice.

Note: In this image you can see that **Item Code** and **Description** on the invoice reads as **STCD - Short Term Contract Deposit**.

- **Close** the preview screen when you are done.

EMAIL SHORT TERM CONTRACT DEPOSIT INVOICE

- In the **Select the option as desired** pop up screen, click on the **radio** button in front of **Email Invoice**.
- Click on **Accept**.



ContractNo	ContractType	ContractTypeDesc	Location	CustomerCode	CustomerName	CustomerDeptCode	CustomerDeptName	OrderNo	StartDate	EndDate	Period	PeriodType
STC0000019	ST	Short Term Contracts	Derton Centre	DER001	Derton Technologies				22 Apr 2016	24 Apr 2016	2 d	
STC0000021	ST	Short Term Contracts	Main	APP0001	Apple Juice Inc	Sales	Sales Department	1234	08 Jun 2017	08 Jun 2017	2 h	
STC0000022	ST	Short Term Contracts	BPO_RSI	ABCXYZ123	ABC Shoe Co			fdg	26 Jun 2017	03 Jul 2017	1 w	
STC0000024	ST	Short Term Contracts	Hillcrest	APP0001	Apple Juice Inc	Sales	Sales Department	10	10 Aug 2017	20 Aug 2017	10 d	
STC0000027	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 001	09 Jul 2018	16 Jul 2018	1 w	
STC0000028	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 009	16 Jul 2018	18 Jul 2018	2 d	
STC0000029	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 010	16 Jul 2018	18 Jul 2018	2 d	
STC0000030	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HWSTCD1...	23 Jul 2018	25 Jul 2018	2 d	

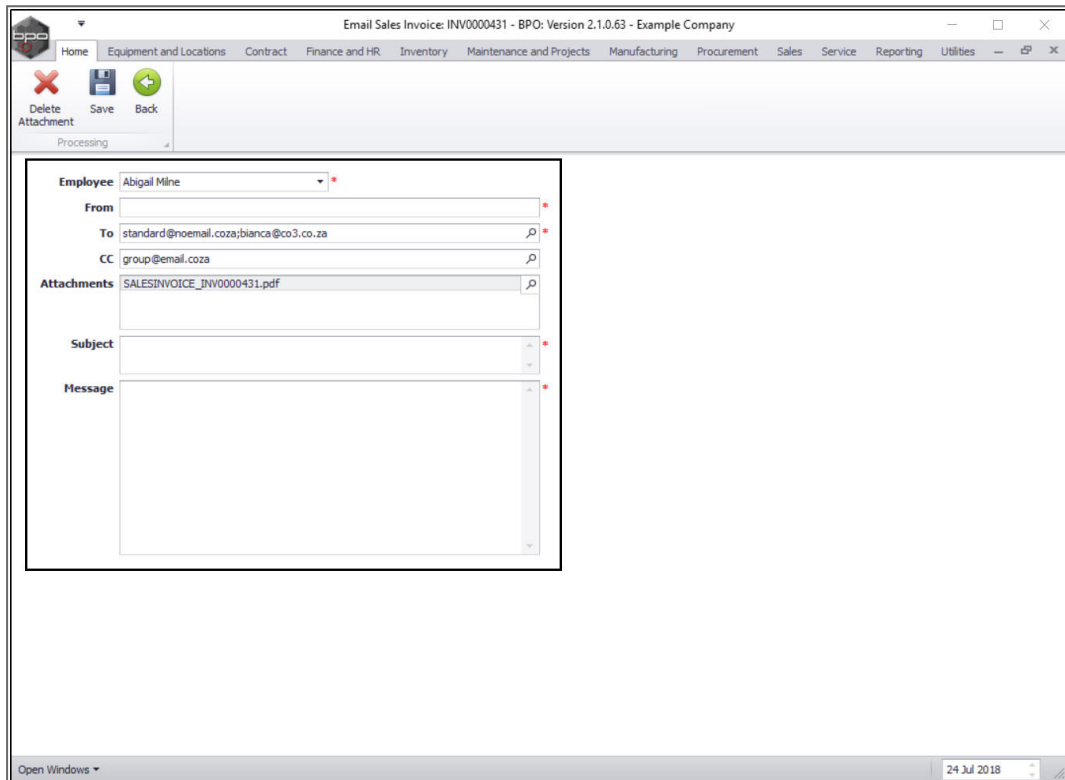
EMAIL DETAILS

The **Email Sales Invoice: []** screen will be displayed.

- **Employee:** This will auto populate with the employee currently logged on to the system. You can click on the drop-down arrow and select an alternative employee if required.
- **From:** Type in the email address of the employee above.
- **To:** This will auto populate with the email address of the customer contact selected on the deposit invoice (the accounts person will be always added to this).
- **CC:** If a group email address has been set up on the order or accounts contact, that will pull through here.
- **Attachments:** BPO will create a PDF of the deposit invoice and attach it automatically (you can attach additional documentation).

- **Subject:** Type in the email subject.
- **Message:** Type in the email message.

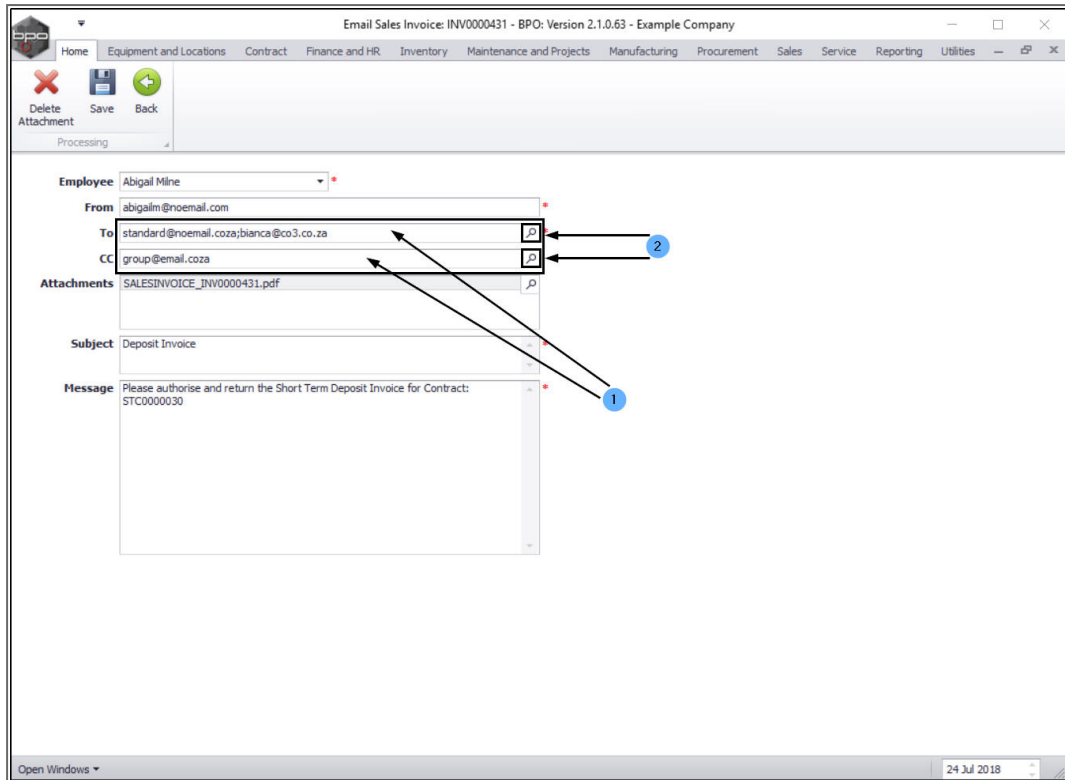
Note: If you receive an '**error**' message when trying to email the document, ask your administrator to make sure that the correct **shared folder location** has been configured in BPO and that you have the relevant **folder rights** to access the shared folder on the server.



ADDITIONAL EMAIL ADDRESSES

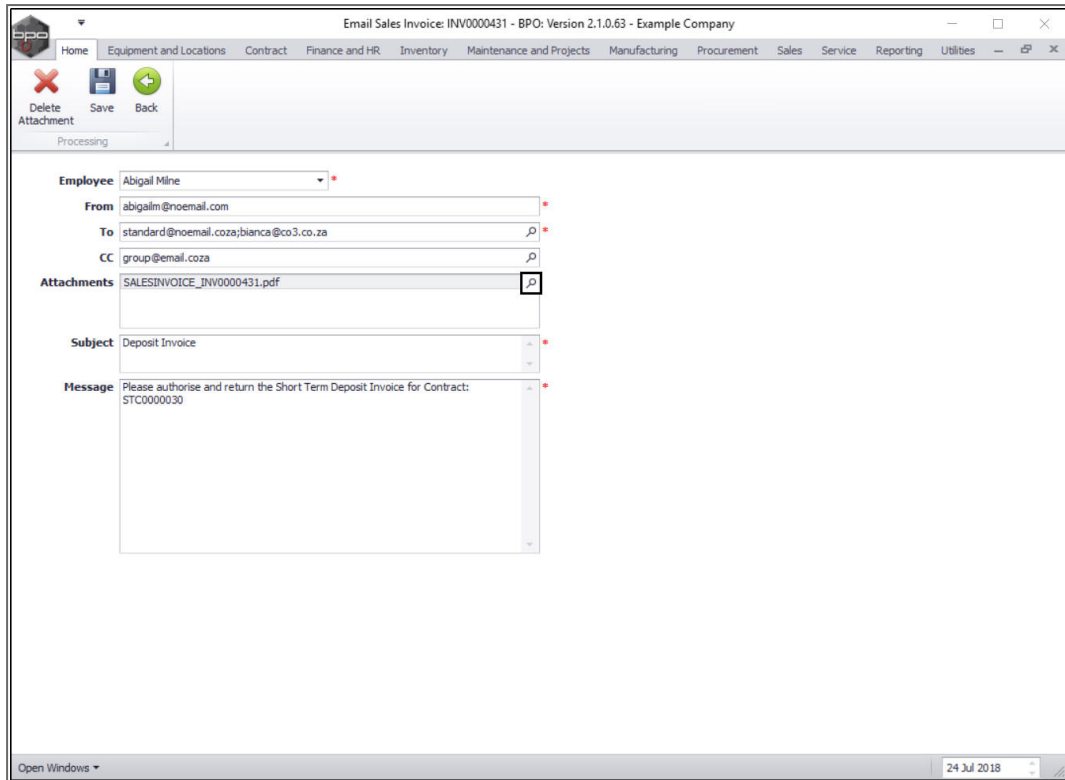
In the **To** or **CC** fields, you can either,

1. type in additional email address(es) (separated by a semi-colon) **or**
2. click on the **search** button and select additional customer contacts.



LINK ADDITIONAL DOCUMENTS

- Click on the **search** button in the **Attachments** field.



CO3 BPO

Email Sales Invoice: INV0000431 - BPO: Version 2.1.0.63 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Delete Attachment | Save | Back

Processing

Employee: Abigal Milne

From: abigalm@noemail.com

To: standard@noemail.co.za; bianca@co3.co.za

CC: group@email.co.za

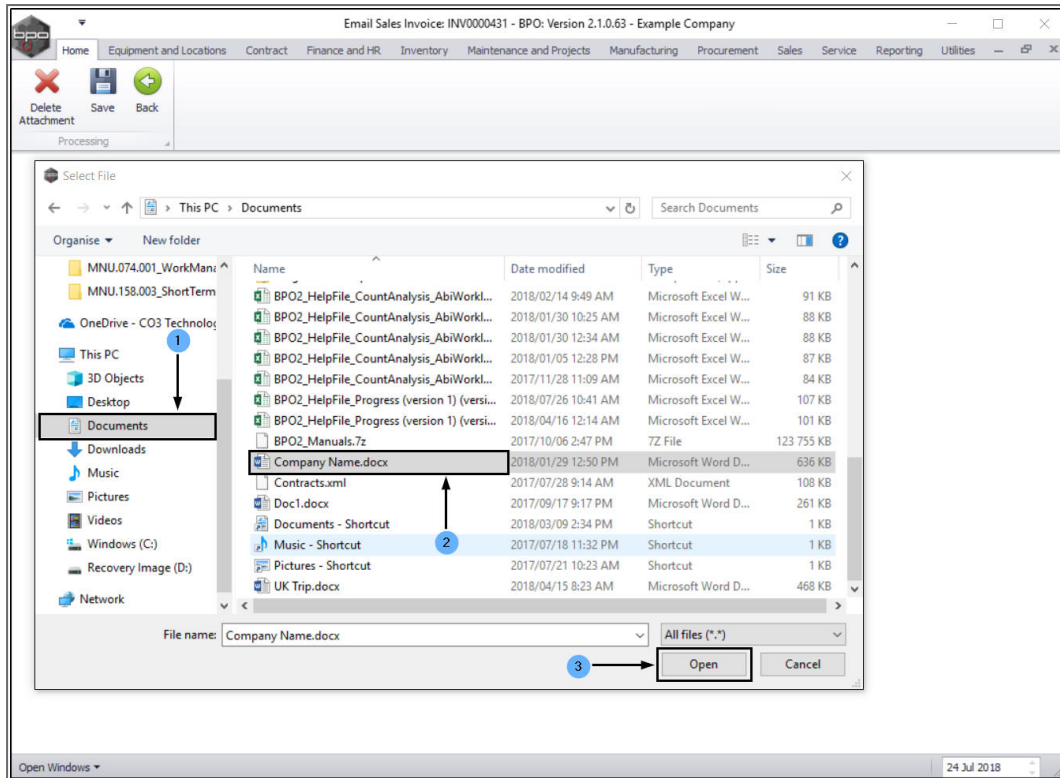
Attachments: SALESINVOICE_INV0000431.pdf

Subject: Deposit Invoice

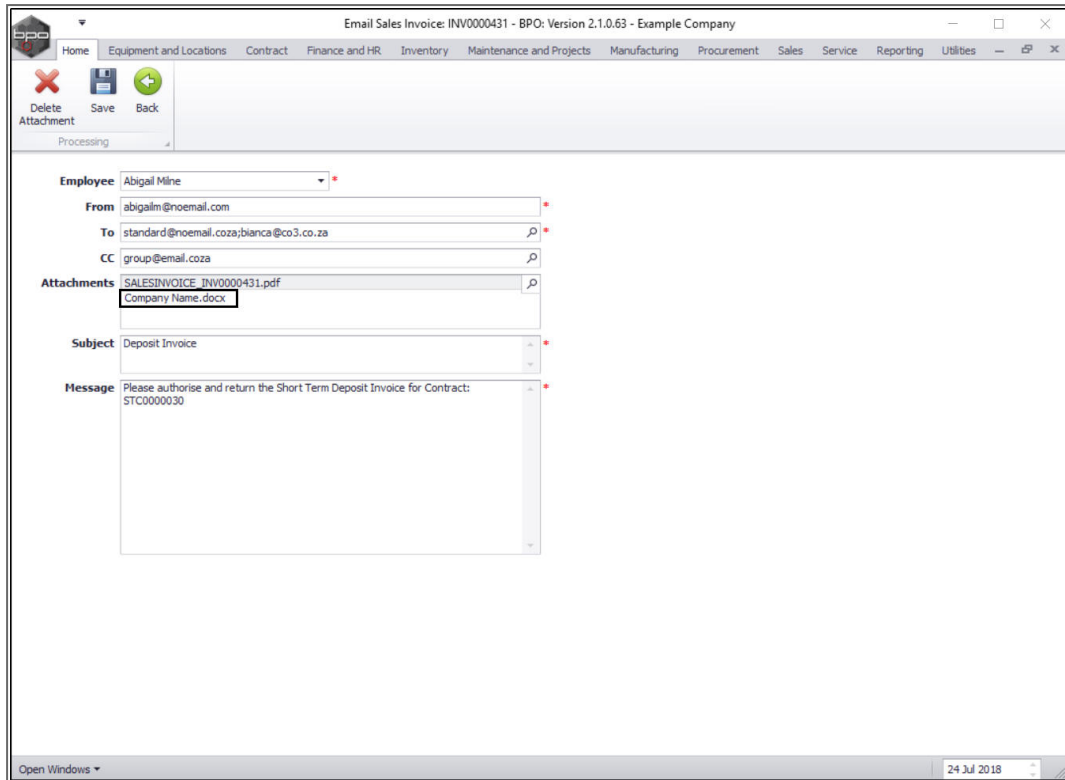
Message: Please authorise and return the Short Term Deposit Invoice for Contract: STC0000030

Open Windows | 24 Jul 2018

- The **Select File: []** screen will pop up.
 1. Select the **file location**.
 2. Click on the **file**.
 3. Click on **Open**.



- You will return to the **Email Sales Invoice: []** screen.
- In the **Attachments** field, you will see that the new document has been added.



DELETE ATTACHMENTS

- If you wish to **delete** a document, click on the **document name**.
- Click on **Delete Attachment**.

Email Sales Invoice: INV0000431 - BPO: Version 2.1.0.63 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Processing

Employee: Abigail Mine

From: abigalm@noemail.com

To: standard@noemail.co.za; bianca@co3.co.za

CC: group@email.co.za

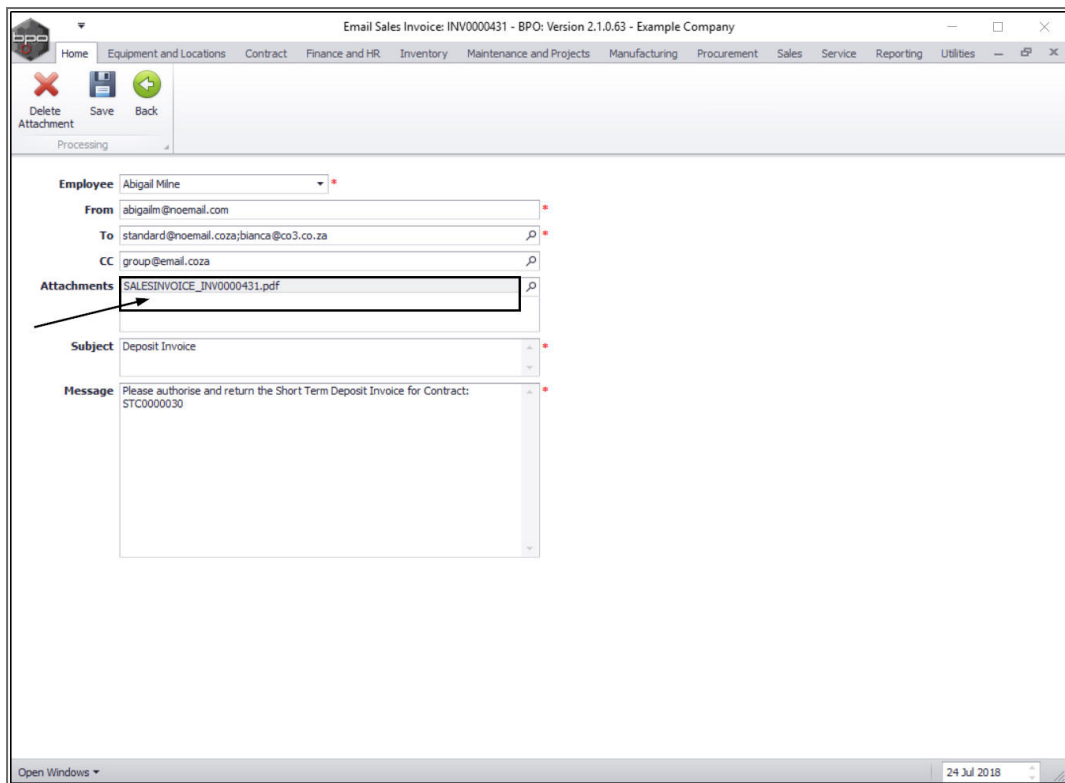
Attachments: SALESINVOICE_INV0000431.pdf
Company Name.docx

Subject: Deposit Invoice

Message: Please authorise and return the Short Term Deposit Invoice for Contract: STC0000030

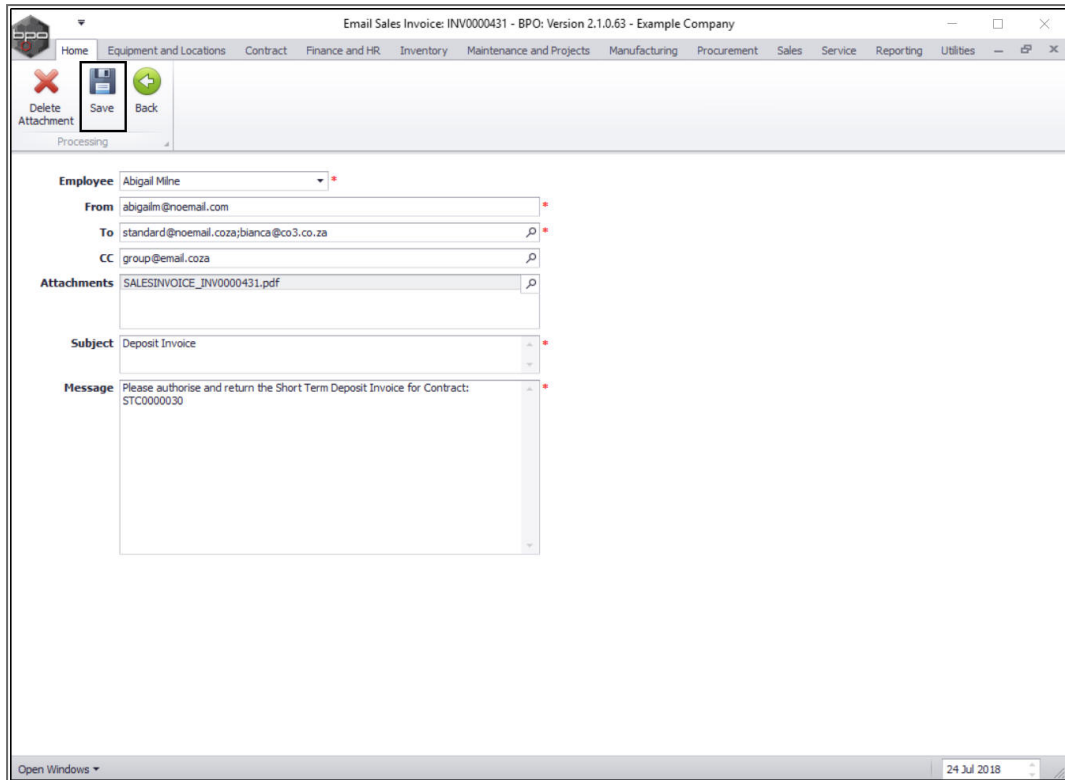
Open Windows | 24 Jul 2018

- The document will be **removed** from the **Attachments** field.



SAVE AND SEND EMAIL

- When you have finished adding all the details to the **Email Sales Invoice: []** screen, click on **Save**.



The screenshot shows a web application window titled "Email Sales Invoice: INV0000431 - BPO: Version 2.1.0.63 - Example Company". The interface includes a top navigation bar with tabs: Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the navigation bar is a toolbar with buttons: Delete Attachment, Save, and Back. The main form area contains the following fields:

- Employee:** A dropdown menu with "Abigail Mine" selected.
- From:** A text field containing "abigalm@noemail.com".
- To:** A text field containing "standard@noemail.co.za;bianca@co3.co.za".
- CC:** A text field containing "group@email.co.za".
- Attachments:** A list box containing "SALESINVOICE_INV0000431.pdf".
- Subject:** A text field containing "Deposit Invoice".
- Message:** A text area containing "Please authorise and return the Short Term Deposit Invoice for Contract: STC0000030".

At the bottom of the window, there is a status bar with "Open Windows" on the left and "24 Jul 2018" on the right.

- The email will be sent via the BPO Email Service on the server and you will return to the **Short Term Contract Listing** screen.

PRINT SHORT TERM CONTRACT (FINAL) INVOICE

- Select the **row** of the contract where you wish to **print** the (final) **Invoice**.
- Click on the drop-down **arrow** on the **Print** button.

Short Term Contract Listing - BPO: Version 2.1.0.63 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Add Edit Close Machine Return WO's Short Term Invoice Save Layout Workspaces Save Filter Print Active Refresh

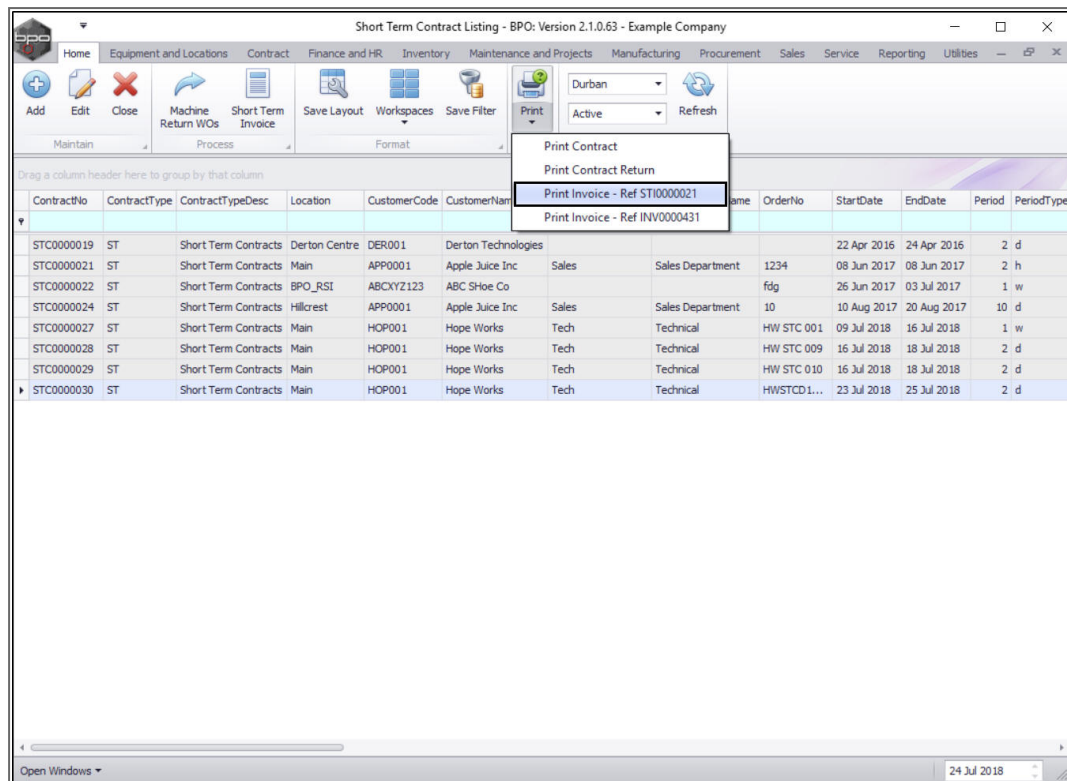
Drag a column header here to group by that column

ContractNo	ContractType	ContractTypeDesc	Location	CustomerCode	CustomerName	CustomerDeptCode	CustomerDeptName	OrderNo	StartDate	EndDate	Period	PeriodType
STC0000019	ST	Short Term Contracts	Derton Centre	DER001	Derton Technologies				22 Apr 2016	24 Apr 2016	2 d	
STC0000021	ST	Short Term Contracts	Main	APP0001	Apple Juice Inc	Sales	Sales Department	1234	08 Jun 2017	08 Jun 2017	2 h	
STC0000022	ST	Short Term Contracts	BPO_RSI	ABCXYZ123	ABC Shoe Co			fdg	26 Jun 2017	03 Jul 2017	1 w	
STC0000024	ST	Short Term Contracts	Hillcrest	APP0001	Apple Juice Inc	Sales	Sales Department	10	10 Aug 2017	20 Aug 2017	10 d	
STC0000027	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 001	09 Jul 2018	16 Jul 2018	1 w	
STC0000028	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 009	16 Jul 2018	18 Jul 2018	2 d	
STC0000029	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 010	16 Jul 2018	18 Jul 2018	2 d	
STC0000030	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HWSTCD 1008	23 Jul 2018	25 Jul 2018	2 d	

Open Windows 24 Jul 2018

- Select **Print Invoice - Ref []** from the drop-down list.

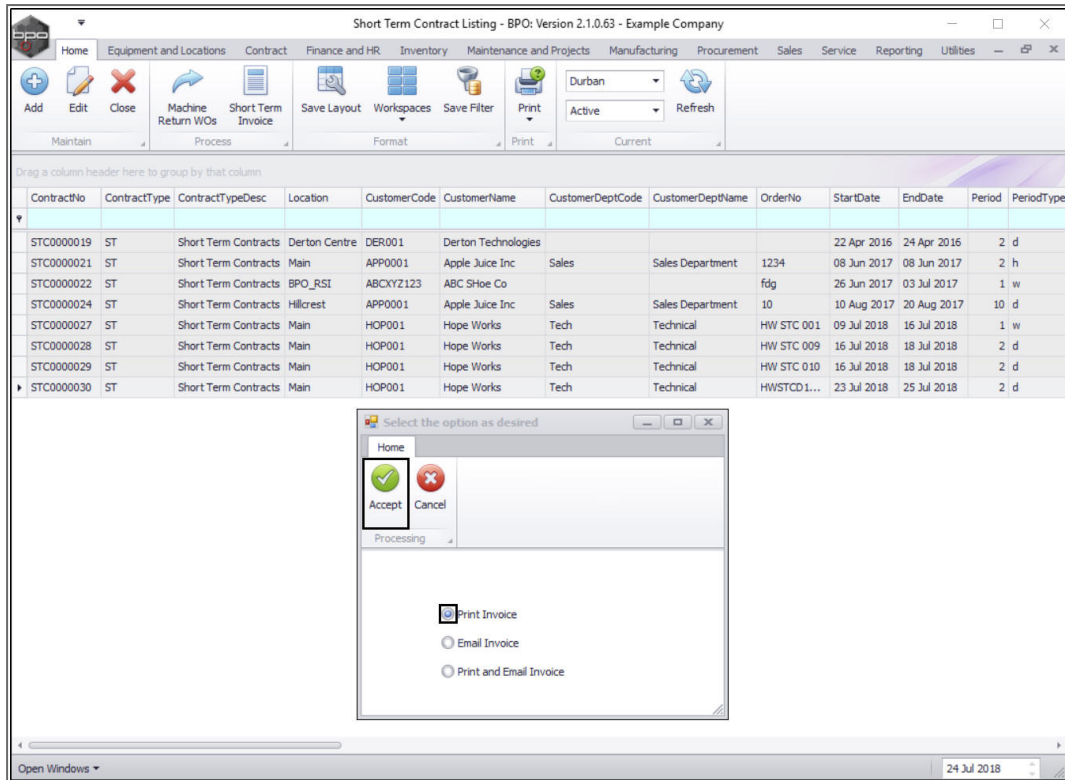
Note: Remember, you will be able to distinguish between the **Deposit** Invoice and the **Short Term** Invoice by the **Invoice Reference numbers** as set up in the Configurator.



SELECT PRINT OPTION

A *Select the option as desired* screen will pop up with the following options;

- **Print:** - will open the Invoice in Report Preview to view, print, export or email.
 - **Email:** - can attach documents, add recipients, the system will create a PDF and email the Invoice.
 - **Print/Email:** - both the Report Preview and Email screens will pop up.
- Click on the **radio** button in front of the option you want.
 - Click on **Accept**.



ContractNo	ContractType	ContractTypeDesc	Location	CustomerCode	CustomerName	CustomerDeptCode	CustomerDeptName	OrderNo	StartDate	EndDate	Period	PeriodType
STC0000019	ST	Short Term Contracts	Derton Centre	DER001	Derton Technologies				22 Apr 2016	24 Apr 2016	2 d	
STC0000021	ST	Short Term Contracts	Main	APP0001	Apple Juice Inc	Sales	Sales Department	1234	08 Jun 2017	08 Jun 2017	2 h	
STC0000022	ST	Short Term Contracts	BPO_RST	ABCXYZ123	ABC Shoe Co			fdg	26 Jun 2017	03 Jul 2017	1 w	
STC0000024	ST	Short Term Contracts	Hillcrest	APP0001	Apple Juice Inc	Sales	Sales Department	10	10 Aug 2017	20 Aug 2017	10 d	
STC0000027	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 001	09 Jul 2018	16 Jul 2018	1 w	
STC0000028	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 009	16 Jul 2018	18 Jul 2018	2 d	
STC0000029	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 010	16 Jul 2018	18 Jul 2018	2 d	
STC0000030	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HWSTCD1...	23 Jul 2018	25 Jul 2018	2 d	

- Now follow the same processes as explained above to;
- [Print](#) the Invoice.
- [Email](#) the Invoice.
- [Link Additional Documents](#) to the Invoice.
- [Delete Attachments](#) from the Invoice.

MNU.158.004

