

# 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*.

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### 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.

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• 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.



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-	TC0000027	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 001	09 Jul 2018	16 Jul 2018	1	w
-	TC0000028	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 009	16 Jul 2018	18 Jul 2018	2	d
-	TC0000029	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 010	16 Jul 2018	18 Jul 2018	2	d
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#### **SELECT PRINT OPTION**

• A *Select the option as desired* screen will pop up with the fol-

lowing 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.



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- 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.



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		Document Ref: INV0000431 Date : 26 Jul 2018	
		Account Manager : Bianca Du Toit	
		Your Ref : Short Term Contract Invoice	
	Contract Ref: STC0000030 Sales Person : Abigail Milne	Call Ref : Machine No :	
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	1234	Durban South 1234	
	Tel No: 031 123 45671	Tel No: 031 123 4567	
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## **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*.



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#### **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 loc-ation* has been configured in BPO and that you have the relevant *folder rights* to access the shared folder on the server.

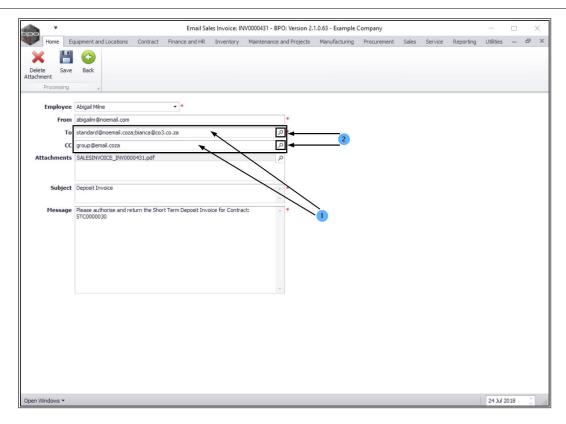
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#### ADDITIONAL EMAIL ADDRESSES

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

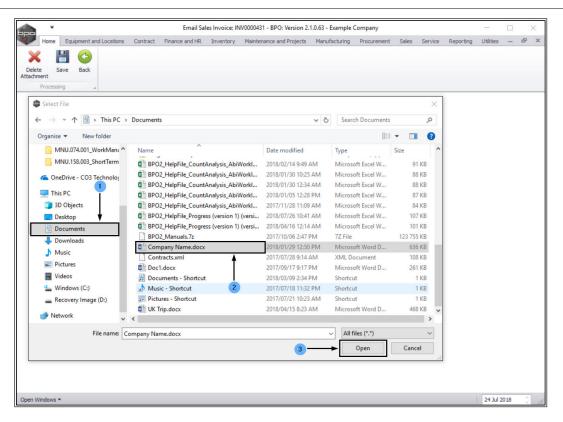
• Click on the *search* button in the *Attachments* field.



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- 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.



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#### **DELETE ATTACHMENTS**

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



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



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#### SAVE AND SEND EMAIL

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



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• 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.



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• 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.



0				S	hort Term Cont	tract Listing - E	BPO: Version 2.1.0	.63 - Example Company			-		×
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#### **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*.



Image: Contractive Contract Water       Instantion					S	hort Term Cont	ract Listing - BPO: V	ersion 2.1.0.63 - Exa	mple Company			-		$\times$
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- Now follow the same processes as explained above to;
  - Print the Invoice.
  - Email the Invoice.
  - Link Additional Documents to the Invoice.
  - <u>Delete Attachments</u> from the Invoice.

MNU.158.004