

We are currently updating our site; thank you for your patience.

CRM CUSTOMERS

VIEW / PRINT CREDIT NOTES

In CRM, you can view and print Sales Credit Notes for your Customers.

However, it is important to note that Sales Credit Notes are created in BPO only.

Ribbon Access: Webpage > [http://\[servername\]:\[port-no\]/BPOCRM/User.aspx](http://[servername]:[port-no]/BPOCRM/User.aspx)

In CRM, Credit Notes can only be accessed from the selected Customer Home page so you will first need to navigate to the Customers listing page to select your customer.

NAVIGATE TO CUSTOMER DASHBOARD (HOME PAGE)

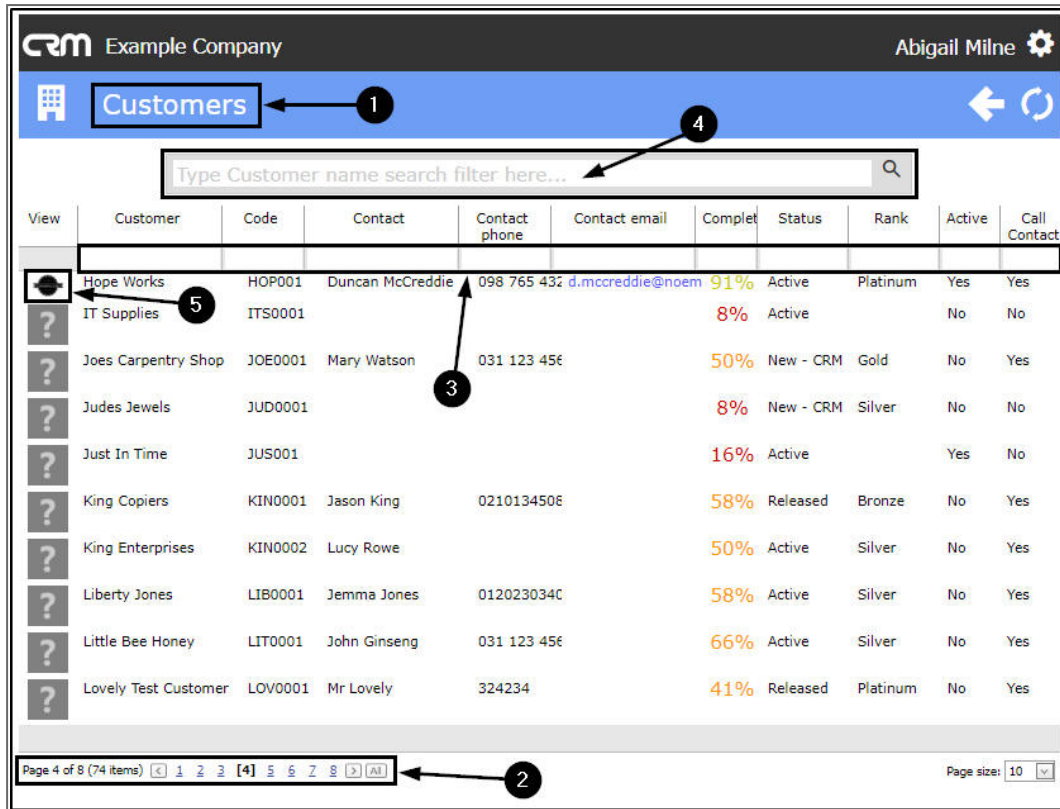
1. In the Dashboard (Home page),
2. Click on the Customers tile.



1. The **Customers** listing page will open.

SEARCH AND SELECT CUSTOMER

2. You can use the **Page Reference** field,
3. the **Filter Row** or
4. the **Filter Text Box** to **search** for your customer.
5. Click on the selected **Customer icon** in the **View** column.



The screenshot shows the CRM interface for 'Example Company' with user 'Abigail Milne'. The 'Customers' tab is selected. A search bar is present with the placeholder 'Type Customer name search filter here...'. Below the search bar is a table with columns: View, Customer, Code, Contact, Contact phone, Contact email, Complet, Status, Rank, Active, and Call Contact. The table lists 10 customers. A pagination bar at the bottom shows 'Page 4 of 8 (74 items)' and a 'Page size: 10' dropdown.

View	Customer	Code	Contact	Contact phone	Contact email	Complet	Status	Rank	Active	Call Contact
	Hope Works	HOP001	Duncan McCreddie	098 765 432	d.mccreddie@noem	91%	Active	Platinum	Yes	Yes
	IT Supplies	ITS0001				8%	Active		No	No
	Joes Carpentry Shop	JOE0001	Mary Watson	031 123 456		50%	New - CRM	Gold	No	Yes
	Judes Jewels	JUD0001				8%	New - CRM	Silver	No	No
	Just In Time	JUS001				16%	Active		Yes	No
	King Copiers	KIN0001	Jason King	0210134508		58%	Released	Bronze	No	Yes
	King Enterprises	KIN0002	Lucy Rowe			50%	Active	Silver	No	Yes
	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	Active	Silver	No	Yes
	Little Bee Honey	LIT0001	John Ginseng	031 123 456		66%	Active	Silver	No	Yes
	Lovely Test Customer	LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes

1. The selected Customer Home page will open.

Note that for the purpose of this manual, the **Customer Dashboard has been hidden** from this page.

2. Click on the Credit Notes tile.



The screenshot displays the CO3 CRM interface for a customer named 'Hope Works' (HOP001). The interface includes a top navigation bar with the company name, user name 'Abigail Milne', and a search bar. A left sidebar contains various functional icons like 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The main content area shows the customer's details, including trading and registered names, VAT number, registration number, rank, website, and phone number. A 12-month sales history chart is also present, showing 'Contract Income' and 'Sales Revenue' from January 2018 to January 2019. The chart shows zero values for both metrics throughout the period.

THE CREDIT NOTES FOR [SELECTED CUSTOMER] LISTING PAGE

1. The **Credit Notes for [selected Customer]** listing page will open.
2. The blue highlighted Credit Note numbers can be selected to be viewed and/or printed. These Credit Notes are in either the Approved or Printed status in BPO.
3. The black Credit Note numbers cannot be viewed or printed. They are in the New, Released or Declined status in BPO.

For more information about Credit Note status in BPO refer to [Introduction to Credit Notes](#).

CRM Example Company Abigail Milne

Credit Notes for Hope Works

Cr Note No	Cr Note Type	Cr Note Status	Cr Note Status Desc	Cr Note Value	Cr Note Date	Salesman Name	Invoice No
CN0000112	Sales	N	New	2396.85	17 Nov 2017	Bianca Du Toit	INV0000401
CN0000113	Sales	N	New	1801.07	17 Nov 2017	Bianca Du Toit	INV0000402
CN0000114	Sales	R	Released	605.62	04 Jul 2018	Abigail Milne	
CN0000115	Sales	N	New	149.50	26 Feb 2019	Abigail Milne	INV0000434
CN0000116	Sales	N	New	1150.00	26 Feb 2019	Abigail Milne	INV0000430
CN0000117	Sales	N	New	506.00	26 Feb 2019	Abigail Milne	INV0000438
CN0000118	Sales	A	Approved	506.00	26 Feb 2019	Abigail Milne	INV0000439
CN0000119	Sales	P	Printed	632.50	26 Feb 2019	Abigail Milne	INV0000440
CN0000120	Sales	P	Printed	6210.00	26 Feb 2019	Abigail Milne	INV0000436
CN0000121	Sales	R	Released	590.75	13 Dec 2019	Abigail Milne	INV0000427

Page 7 of 7 (70 items) [1] [2] [3] [4] [5] [6] [7] [All] Page size: 10

[Create Filter](#)

SEARCH FOR AND SELECT A CREDIT NOTE

1. You can use the **Filter Row**,
2. the **Page Reference** field, or
3. the **Create Filter** row to search for a specific Credit Note.

CRM Example Company Abigail Milne

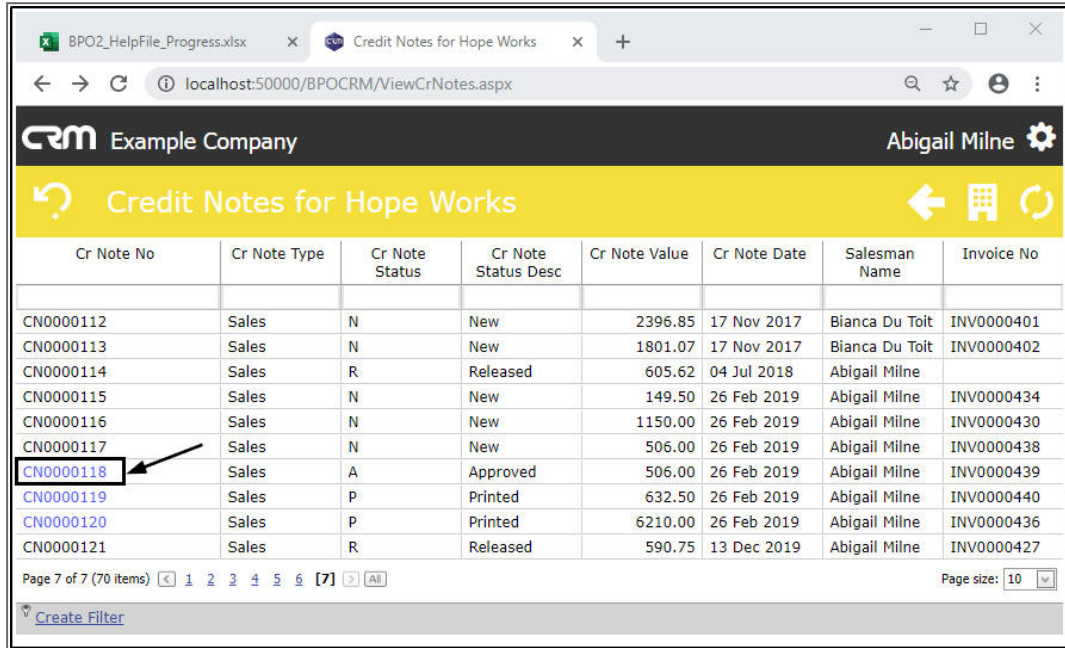
Credit Notes for Hope Works

Cr Note No	Cr Note Type	Cr Note Status	Cr Note Status Desc	Cr Note Value	Cr Note Date	Salesman Name	Invoice No
CN0000112	Sales	N	New	2396.85	17 Nov 2017	Bianca Du Toit	INV0000401
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Page 7 of 7 (70 items) [1] [2] [3] [4] [5] [6] [7] [All] [Create Filter](#)

VIEW, DOWNLOAD OR PRINT CUSTOMER CREDIT NOTE

- In the Credit Note No. column, click on a blue number of the Credit Note that you wish to **View**, **Print** or **Download**.









Cr Note No	Cr Note Type	Cr Note Status	Cr Note Status Desc	Cr Note Value	Cr Note Date	Salesman Name	Invoice No
CN0000112	Sales	N	New	2396.85	17 Nov 2017	Bianca Du Toit	INV0000401
CN0000113	Sales	N	New	1801.07	17 Nov 2017	Bianca Du Toit	INV0000402
CN0000114	Sales	R	Released	605.62	04 Jul 2018	Abigail Milne	
CN0000115	Sales	N	New	149.50	26 Feb 2019	Abigail Milne	INV0000434
CN0000116	Sales	N	New	1150.00	26 Feb 2019	Abigail Milne	INV0000430
CN0000117	Sales	N	New	506.00	26 Feb 2019	Abigail Milne	INV0000438
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CN0000119	Sales	P	Printed	632.50	26 Feb 2019	Abigail Milne	INV0000440
CN0000120	Sales	P	Printed	6210.00	26 Feb 2019	Abigail Milne	INV0000436
CN0000121	Sales	R	Released	590.75	13 Dec 2019	Abigail Milne	INV0000427

Page 7 of 7 (70 items) [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) **[7]** [All](#) Page size: 10

[Create Filter](#)














- In the **Order No.** column, click on the blue number of the Order that you wish to **View**, **Print** or **Download**.


Example Company
Abigail Milne 


Orders for Hope Works
2
  

Order No	Order Status	Order Status Desc	Order Value	Currency
OR0000238	I	Invoiced order	14073.30	ZAR
OR0000239	N	New order	517.50	ZAR
OR0000240	I	Invoiced order	6210.00	ZAR
OR0000242	I	Invoiced order	6210.00	ZAR
OR0000243	I	Invoiced order	6210.00	ZAR
OR0000244	I	Invoiced order	3220.00	ZAR
OR0000246	N	New order	2686.98	ZAR
OR0000247	I	Invoiced order	1005.10	ZAR
OR0000248	I	Invoiced order	805.00	ZAR
OR0000249	I	Invoiced order	6210.00	ZAR

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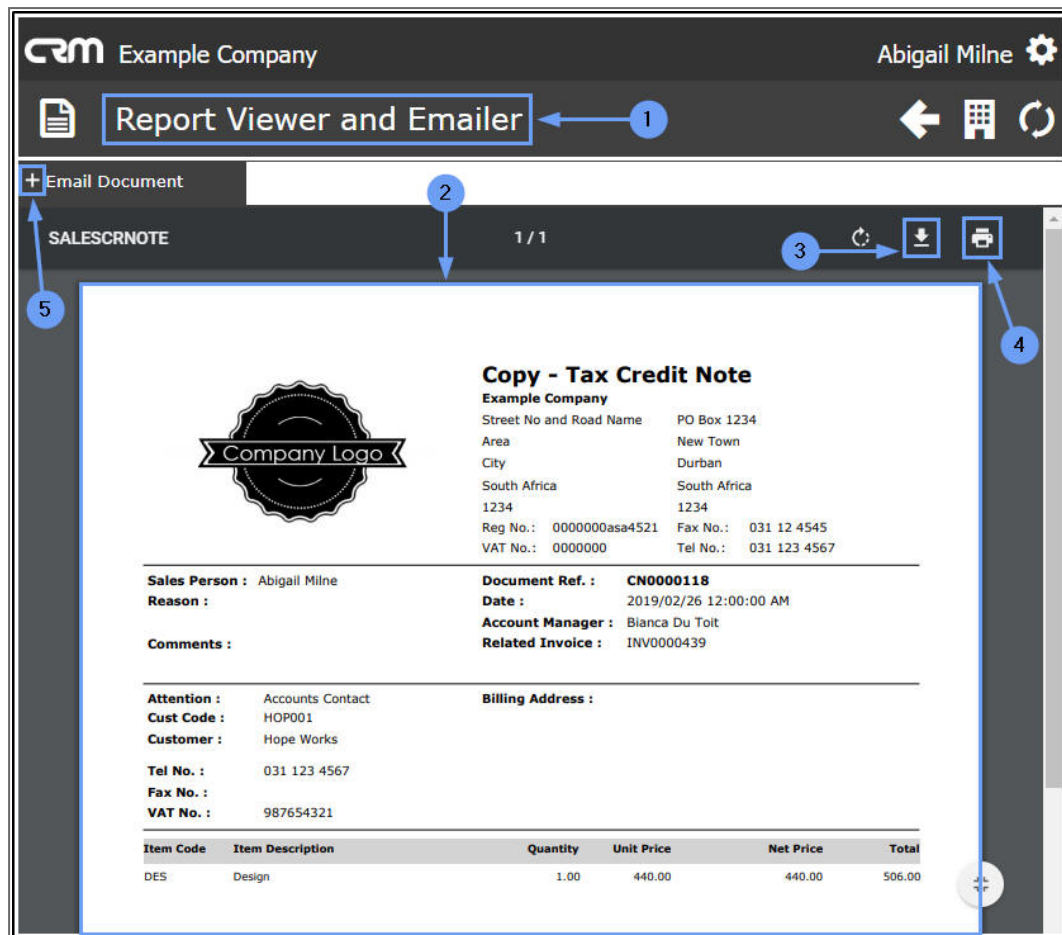













1
Page size: 10

Create Filter
3

1. The **Report Viewer and Emler** page will open.
2. The selected Credit Note will be displayed.
3. Here you can **Download** the Credit Note and/or
4. **Print** the Credit Note.

EMAIL CREDIT NOTE

5. Click on the expand icon [+] on the **Email Document** tab.



CRM Example Company Abigail Milne

Report Viewer and Emailer

+ Email Document

SALESCRNOTE 1 / 1

Copy - Tax Credit Note
Example Company
 Street No and Road Name PO Box 1234
 Area New Town
 City Durban
 South Africa South Africa
 1234 1234
 Reg No.: 0000000asa4521 Fax No.: 031 12 4545
 VAT No.: 0000000 Tel No.: 031 123 4567

Sales Person : Abigail Milne
 Reason :
 Comments :

Document Ref. : CN0000118
 Date : 2019/02/26 12:00:00 AM
 Account Manager : Bianca Du Toit
 Related Invoice : INV0000439

Attention : Accounts Contact
 Cust Code : HOP001
 Customer : Hope Works
 Tel No. : 031 123 4567
 Fax No. :
 VAT No. : 987654321

Billing Address :

Item Code	Item Description	Quantity	Unit Price	Net Price	Total
DES	Design	1.00	440.00	440.00	506.00

1. The **Email Document** frame will be expanded.

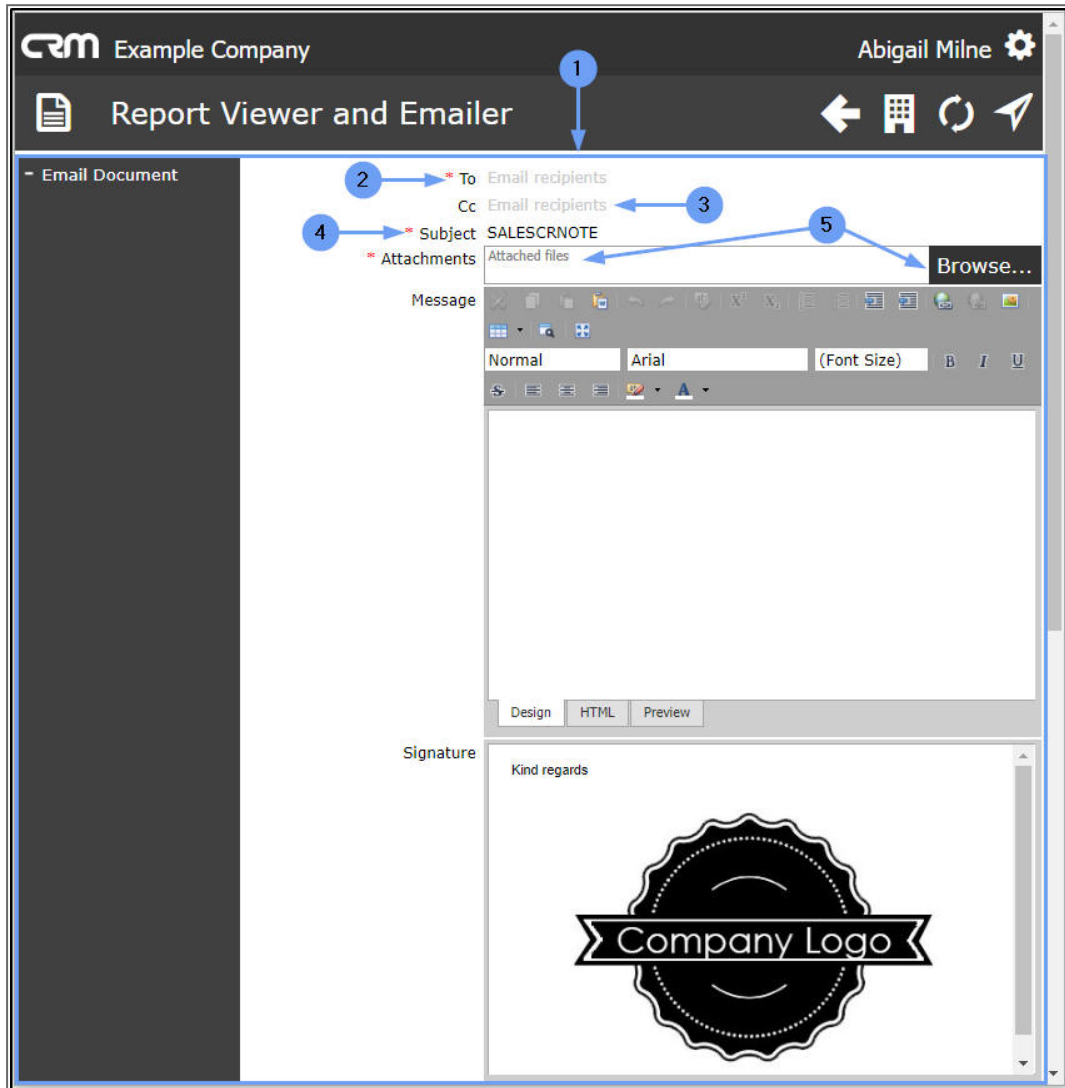
Check and/or add the following details, as necessary:

2. **To:** Either click in the field and select the preferred contact from the list, or type in the contact email address.
3. **Cc:** Here, you can add other email recipients, if applicable.
 - Either click in the field and select customer contacts from the list, or type in additional addresses as noted above (separated by a semi-colon and a space).
4. **Subject:** This field will auto populate with **SALESCRNOTE** but you can edit this, if required.

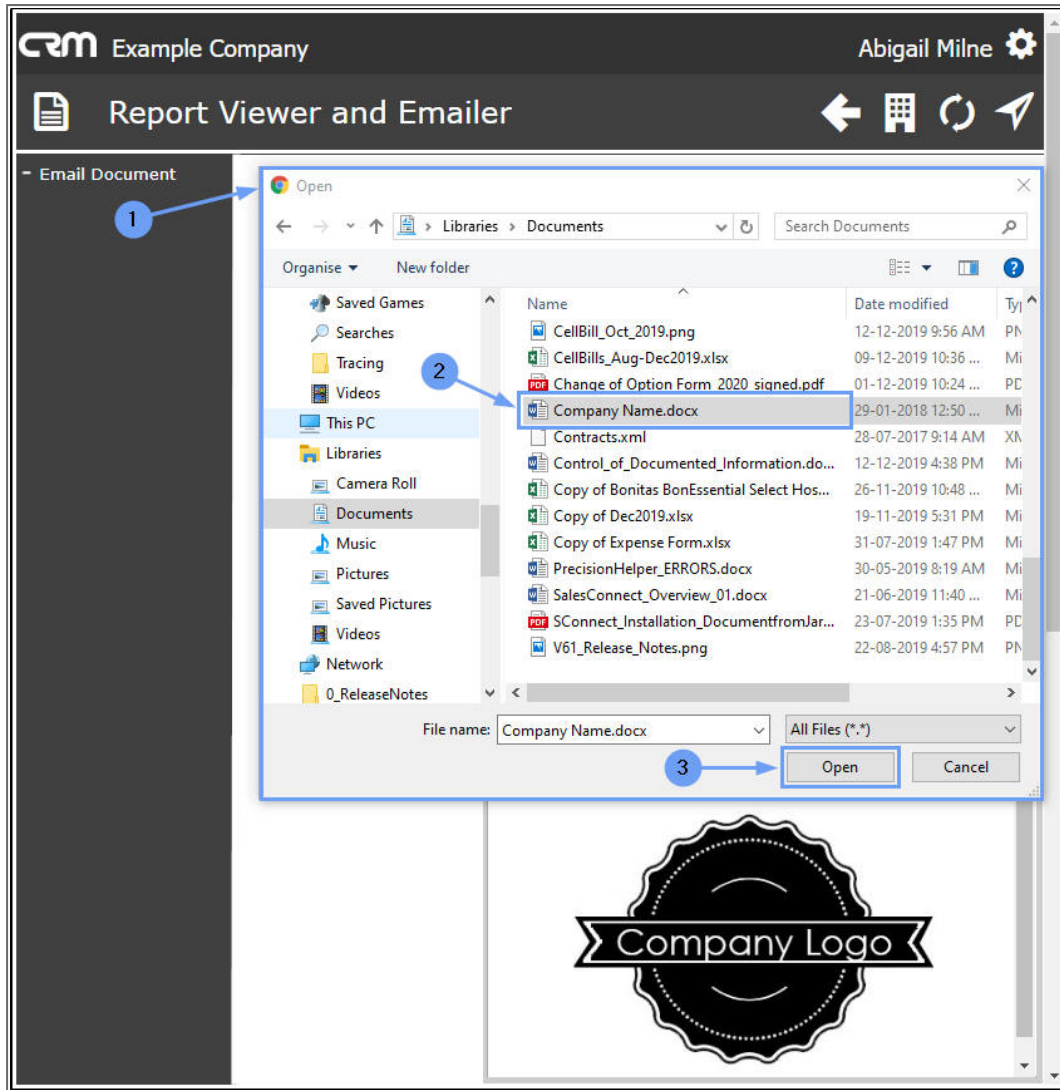
ADD AN ATTACHMENT

You can add other documents, as attachments, if required.

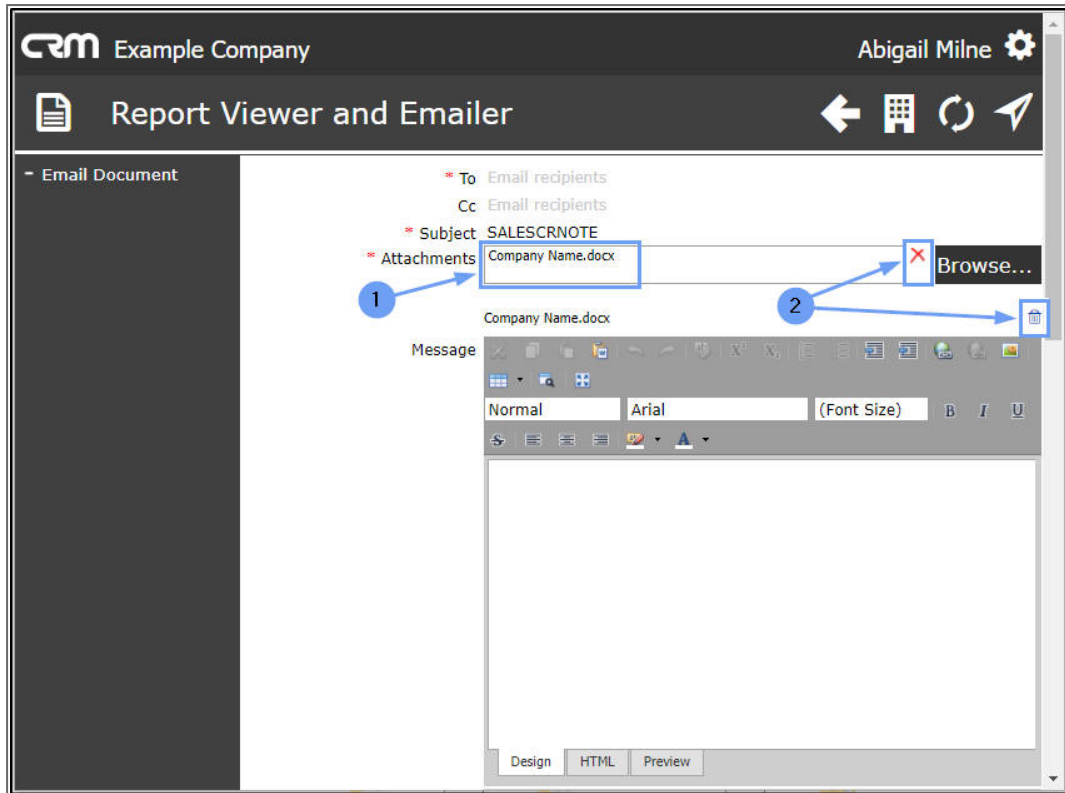
5. **Attachments:** Click on **Browse**.



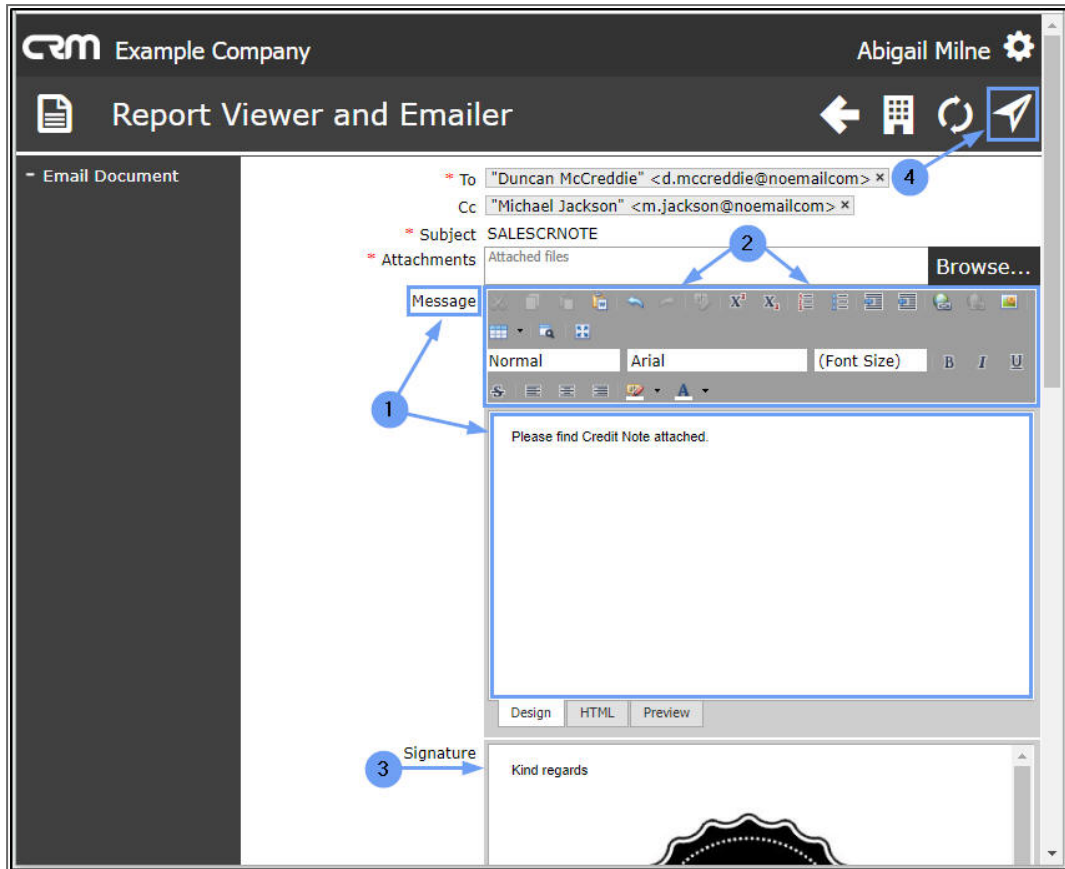
1. The **Open** screen will pop up.
2. Search for and select the file you wish to link to this Order.
3. Click on **Open**.



1. The file will now be attached to the email.
2. You can delete the attachment if required by clicking on either of the **Delete** icons.



1. Type a relevant message in the **Message** body.
2. The **Message tool bar** can be used to customise your email message.
3. **Signature:** If you have a **Signature configured in CRM** - your Signature will pull through here, otherwise the **Company default CRM mail signature** will pull through.
4. Click on the **Send** icon.



1. A **message box** will pop up informing you of the status of the sent email.
2. Click on **Back** .

*Image*****

1. You will return to the **Credit Notes for [selected customer]** listing page.
2. Select another Credit Note to View, Download, Print or Email, if required.
3. Click on the **Customers** icon to return to the **Customer Dashboard** (Customer Home page).
4. Click on the **CRM** icon to return to the **Dashboard** (Home page).

*Image*****



UNDER CONSTRUCTION

We are currently updating our site; thank you
for your patience, please check back soon.



CRM.002.009

