

CRM CUSTOMERS

INVOICES

You can view, download, print and/or email Sales Invoices for your Customers in CRM.

However, Sales Invoices are **created** in BPO only.

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

NAVIGATE TO CUSTOMER DASHBOARD (CUSTOMER HOME PAGE)

To access your customer-specific list of Invoices, you will first need to navigate to the Customer Dashboard (Customer 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 a CRM interface for 'Example Company' with user 'Abigail Milne'. The main navigation bar has a 'Customers' tile (1) and a search bar (4) with the placeholder text 'Type Customer name search filter here...'. Below is a table of customer invoices with columns: View, Customer, Code, Contact, Contact phone, Contact email, Complet, Status, Rank, Active, and Call Contact. The table lists 10 customers with their respective completion percentages and statuses. A pagination bar at the bottom shows 'Page 1 of 8 (74 items)' and a page size of 10 (2).

View	Customer	Code	Contact	Contact phone	Contact email	Complet	Status	Rank	Active	Call Contact
[?]	ABC SHoe Co	ABXZY12				8%	Active	Gold	Yes	No
[?]	ABI Goods	ABI0001	Lucy	081023503€		50%	New - CRM	Metal	No	Yes
[?]	Another new customer	ANO0001				8%	Active		No	No
[?]	Apple Juice Inc	APP0001	Duncan McCreddie			50%	Active	Gold	Yes	Yes
[?]	Bearing and Shoe	BEA001				25%	Active	Metal	No	No
[?]	Bernies Builders	BER0001				8%	Active		No	No
[?]	Betties Summer Shop at the Beach	BET0001	Bettie Summervel	031 123 45€		50%	Active	Gold	No	Yes
[?]	Big Bargains	BIG0001				8%	Active		Yes	No
[?]	Billys Barn	BIL0001				8%	Active		No	No
[?]	Bits and Bytes	BIT001				8%	Active		No	No

1. The **Customer Dashboard** (Customer Home page) will open.
2. Click on the **Invoices** tile.

CRM Example Company Abigail Milne

ABC SHoe Co Search

Description	Target	Existing Custmrs	New Custmrs
Email	30	2	0
Meeting	20	0	2
On Site inspection	20	1	0
Phone call	20	2	0

Category	Value
Cases	~10,000.00
Invoices	~15,000.00
Orders	~15,000.00
Quotes	~50,000.00

Month	Value
Nov 2019	~6,000.00
Dec 2019	~2,000.00
Jan 2020	~0.00
Feb 2020	~0.00

ABC SHoe Co - ABCXYZ123

Trading Name: 8%

Registered Name: [?]

Description: [?]

VAT No: 9876543210

Rank: Gold

Website: [?]

Phone: [?]

Created: 2016/10/18 3:21:43 PM

Month	Contract Income	Sales Revenue
January 2018	0.00	0.00
February 2018	0.00	0.00
March 2018	0.00	0.00
April 2018	0.00	0.00
May 2018	0.00	0.00
June 2018	0.00	0.00
July 2018	0.00	0.00
August 2018	0.00	0.00
September 2018	0.00	0.00
October 2018	0.00	0.00
November 2018	0.00	0.00
December 2018	0.00	0.00
January 2019	0.00	0.00

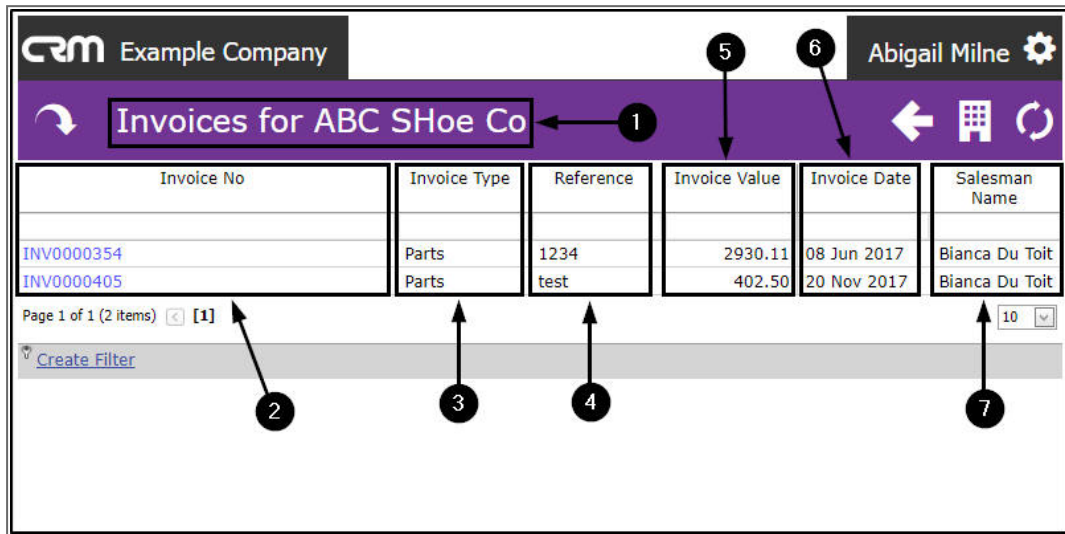
The **Invoices for [selected customer]** listing page

1. The **Invoices for [selected customer]** listing page will open.
2. All of the Invoices linked to this customer will be displayed (even ones where you are not the Salesman).

The following information columns can be viewed in this page:

3. **Invoice Type** (e.g. Parts)
4. Invoice **Reference** number

5. **Invoice Value**
6. **Invoice Date** and the
7. **Salesman Name** of each Invoice.



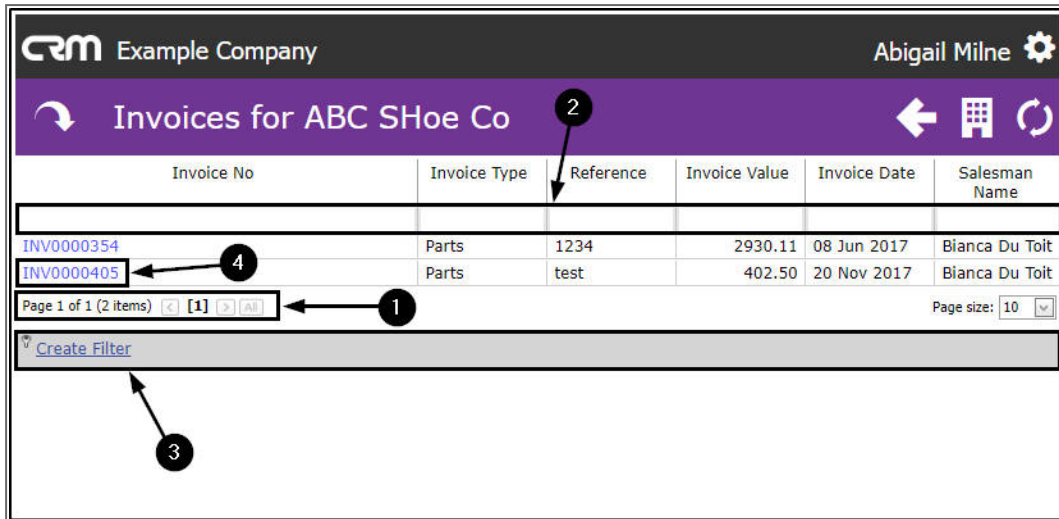
Invoice No	Invoice Type	Reference	Invoice Value	Invoice Date	Salesman Name
INV0000354	Parts	1234	2930.11	08 Jun 2017	Bianca Du Toit
INV0000405	Parts	test	402.50	20 Nov 2017	Bianca Du Toit

SEARCH AND SELECT INVOICE

1. You can use the **Page Reference** field or the
2. **Filter Row** or the
3. **Create Filter Row** functionality to search for a particular Invoice.

VIEW / DOWNLOAD / PRINT CUSTOMER INVOICE

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



Invoice No	Invoice Type	Reference	Invoice Value	Invoice Date	Salesman Name
INV0000354	Parts	1234	2930.11	08 Jun 2017	Bianca Du Toit
INV0000405	Parts	test	402.50	20 Nov 2017	Bianca Du Toit

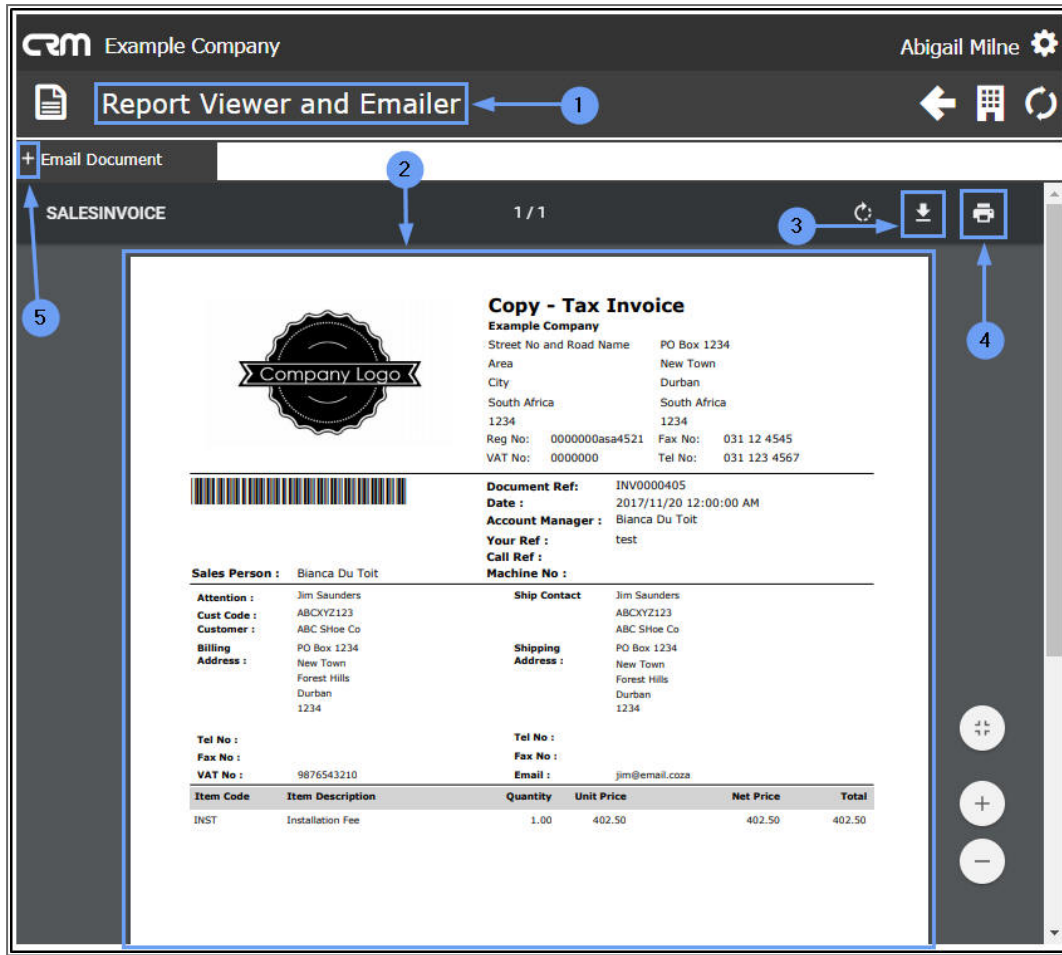
Page 1 of 1 (2 items) [<] [1] [>] [All] Page size: 10

[Create Filter](#)

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

EMAIL ORDER

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



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

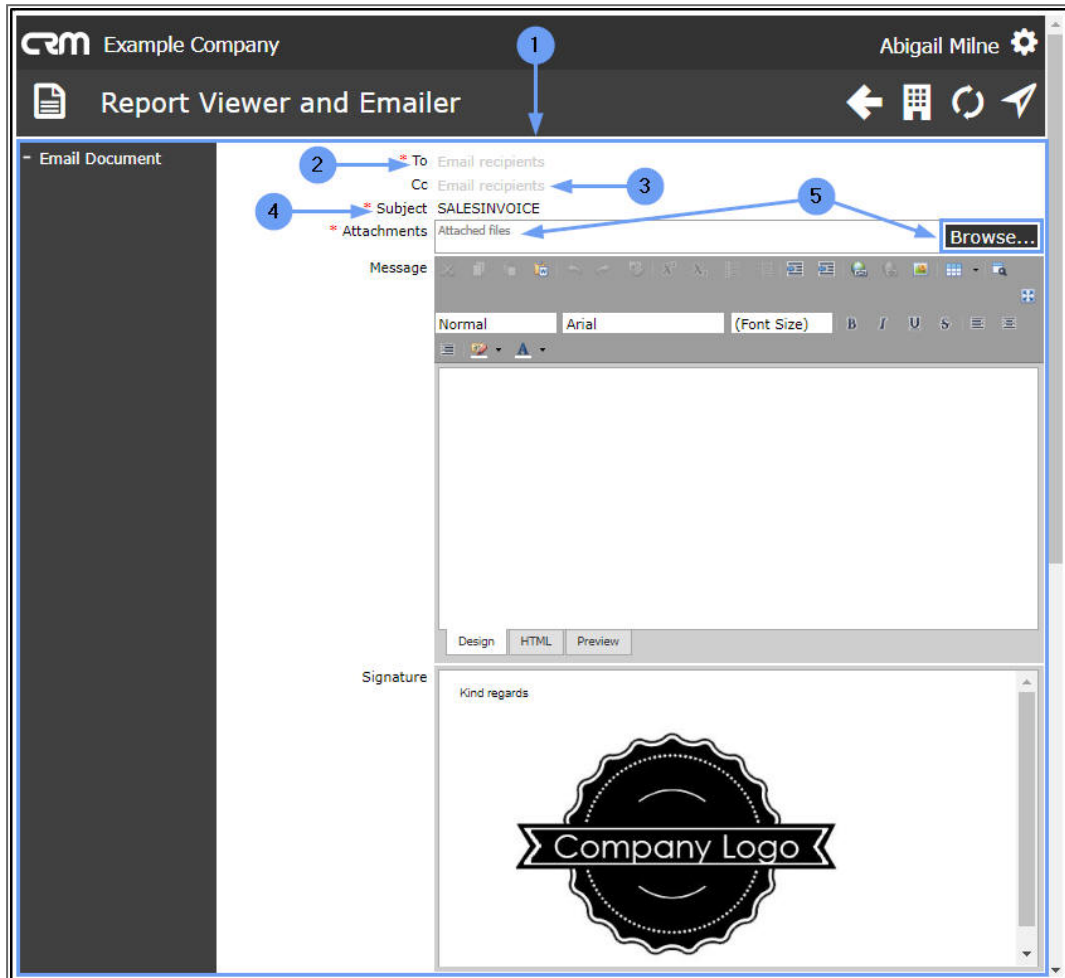
Check and/or add the following details, as necessary:

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 **Sales Invoice** but you can edit this, if required.

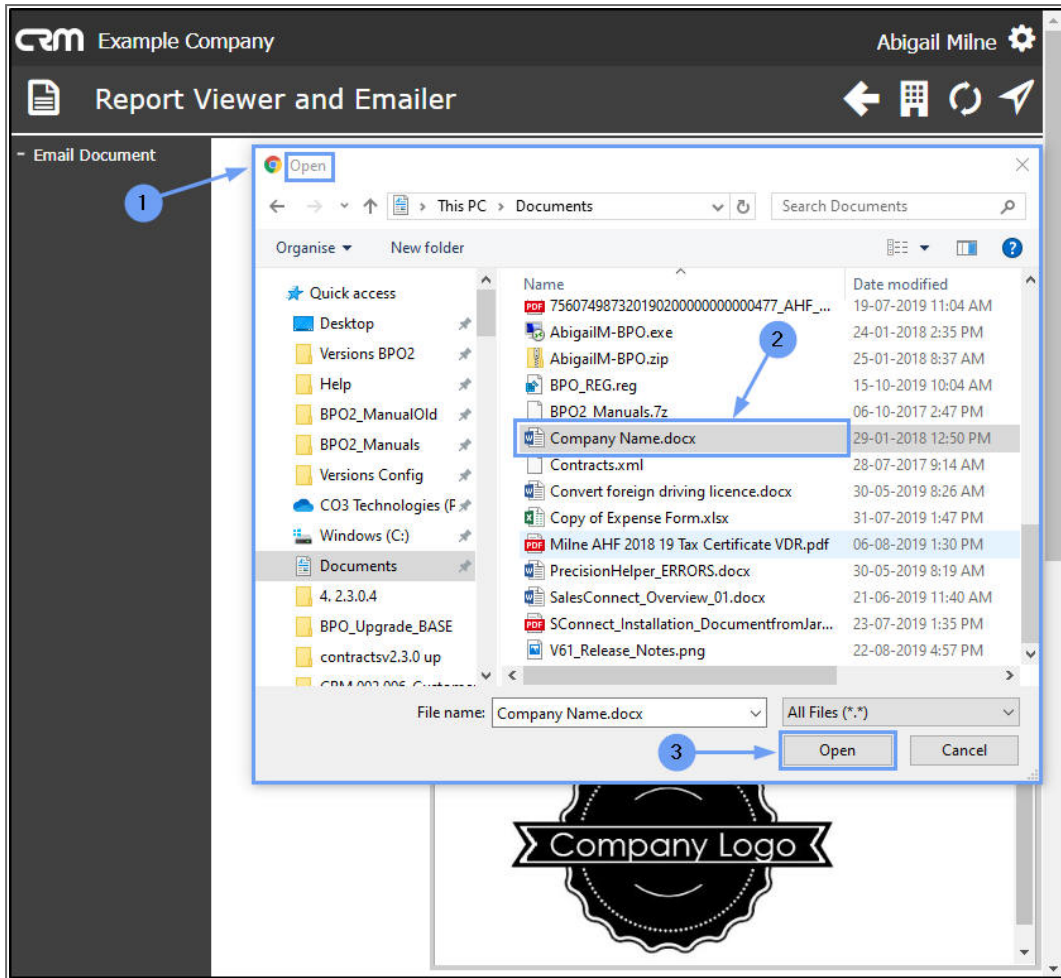
ADD AN ATTACHMENT

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

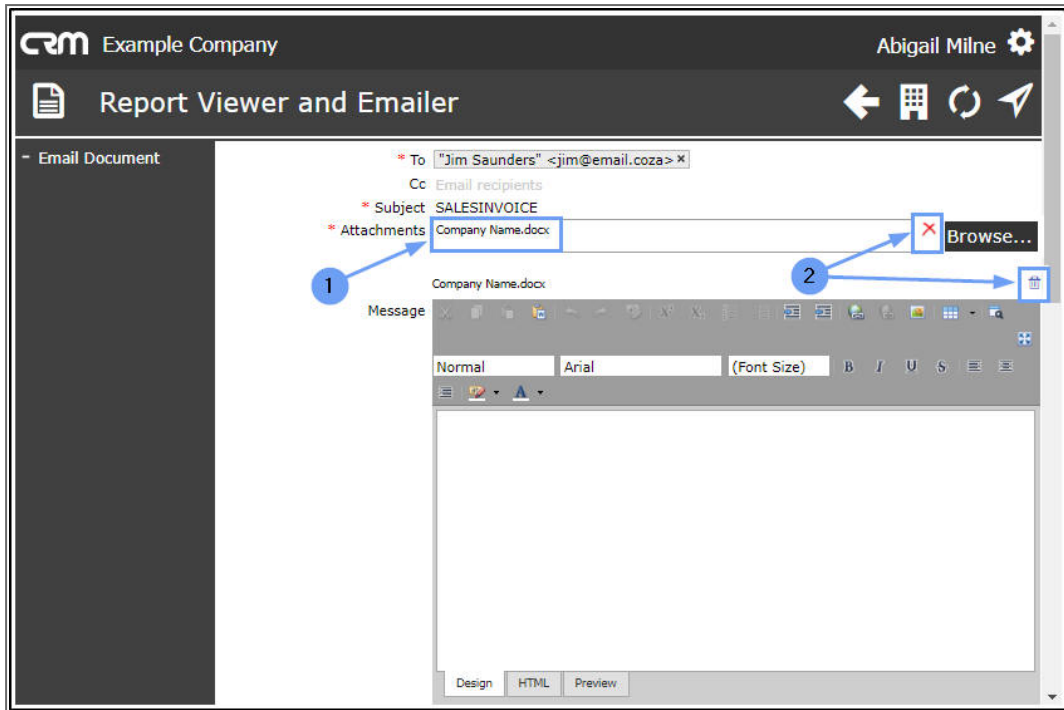
5. **Attachments:** Click on **Browse**.



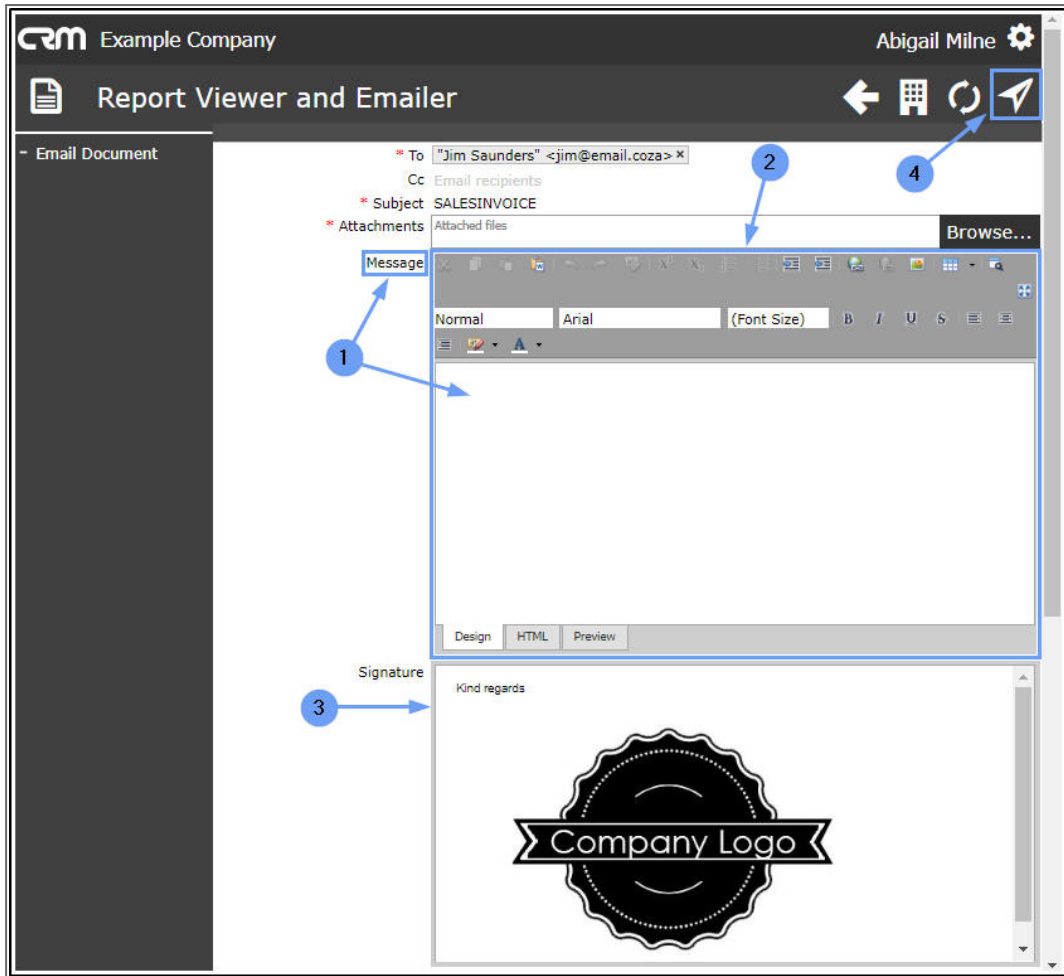
1. The **Open** screen will pop up.
2. Search for and select the file you wish to link to this Invoice.
3. Click on **Open**.



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**.

Report Viewer and Emailer

SALESINVOICE 1 / 1

Copy - Tax Invoice

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

Document Ref: INV0000405
Date : 2017/11/20 12:00:00 AM
Account Manager : Bianca Du Toit
Your Ref : test
Call Ref :
Machine No :

Sales Person : Bianca Du Toit

Attention : Jim Saunders
Cust Code : ABCXYZ123
Customer : ABC Shoe Co
Billing Address : PO Box 1234
 New Town
 Forest Hills
 Durban
 1234

Ship Contact Jim Saunders
 ABCXYZ123
 ABC Shoe Co
Shipping Address : PO Box 1234
 New Town
 Forest Hills
 Durban
 1234

Tel No :
Fax No :
VAT No : 9876543210

Tel No :
Fax No :
Email : jim@email.co.za

Item Code	Item Description	Quantity	Unit Price	Net Price	Total
INST	Installation Fee	1.00	402.50	402.50	402.50

1. You will return to the **Invoices for [selected customer]** listing page.
2. Select another Invoice 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).

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main heading is 'Invoices for ABC SHoe Co'. A table displays invoice data with columns: Invoice No, Invoice Type, Reference, Invoice Value, Invoice Date, and Salesman Name. Two rows are visible, with the first row's 'Invoice No' cell highlighted. Below the table is a pagination bar and a 'Create Filter' section.

Invoice No	Invoice Type	Reference	Invoice Value	Invoice Date	Salesman Name
INV0000354	Parts	1234	2930.11	08 Jun 2017	Bianca Du Toit
INV0000405	Parts	test	402.50	20 Nov 2017	Bianca Du Toit

Page 1 of 1 (2 items) [1] [A]

Page size: 10

Create Filter

CRM.002.008

