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*

In CRM, Credit Notes can only 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.

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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.

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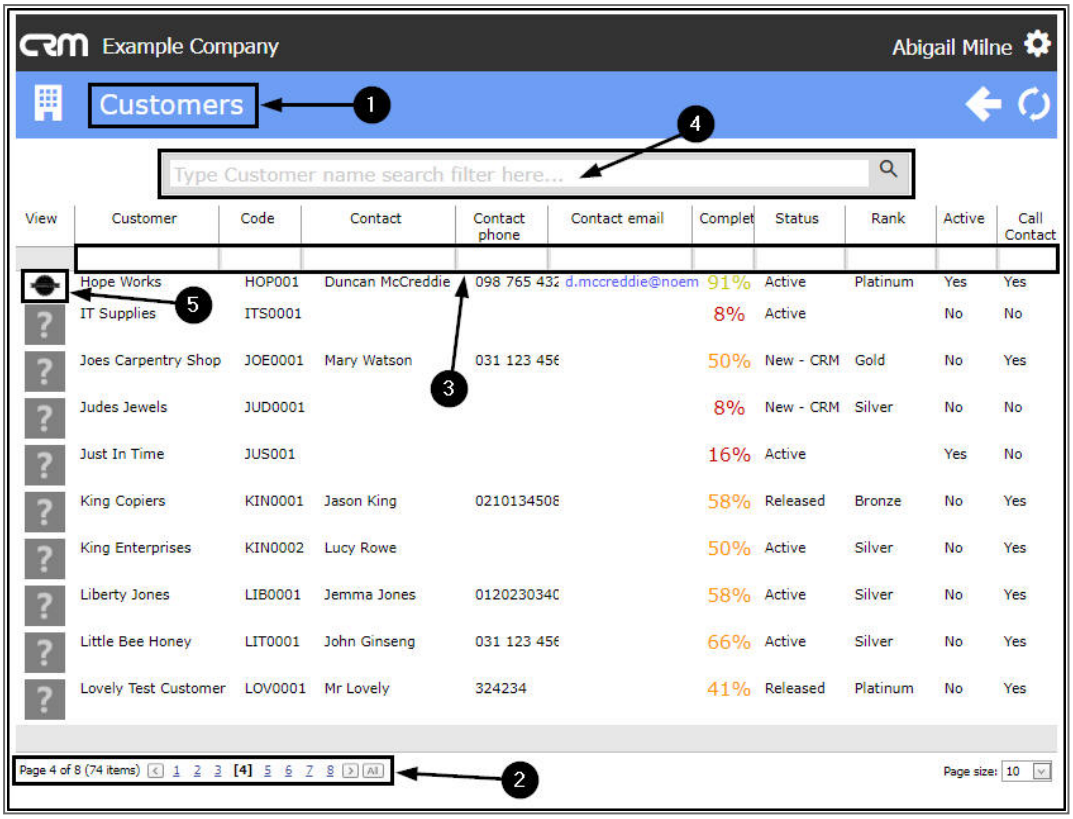

1. The selected Customer Home page will open.

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

2. Click on the Credit Notes tile.

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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.

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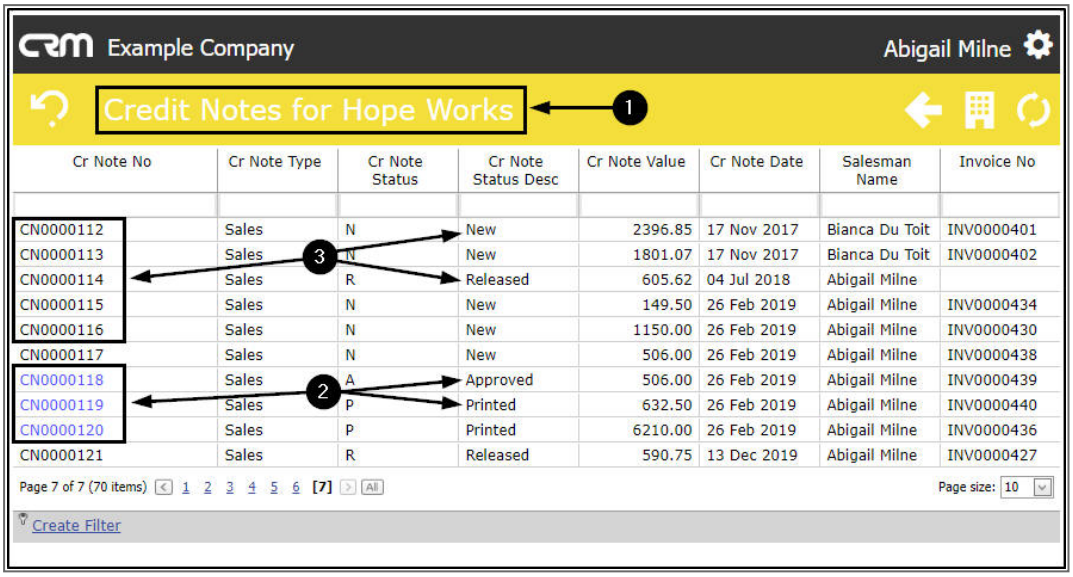
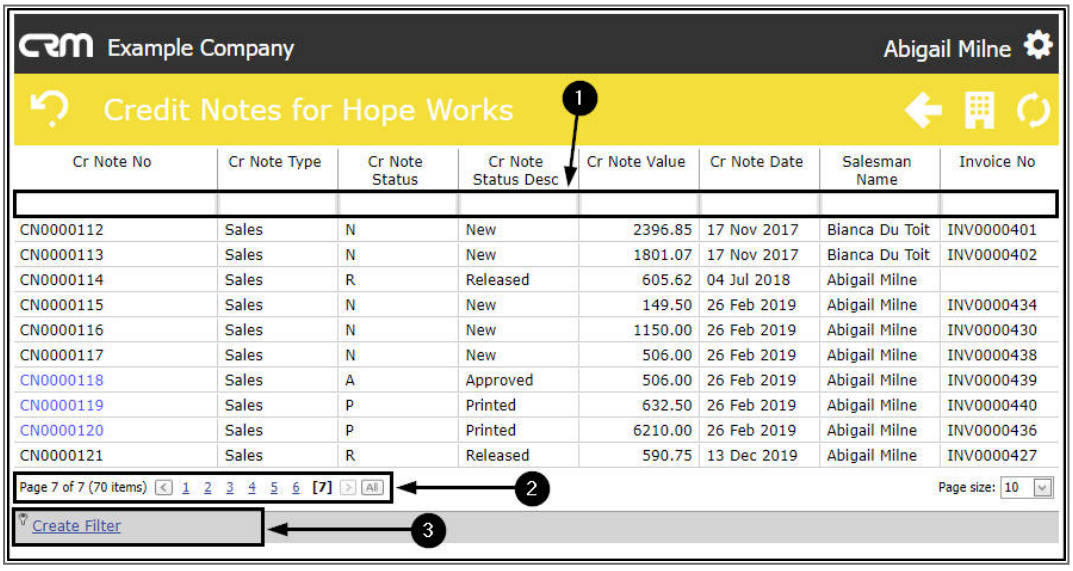
For more information about Credit Note status in BPO refer to Introduction to Credit Notes.



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

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.



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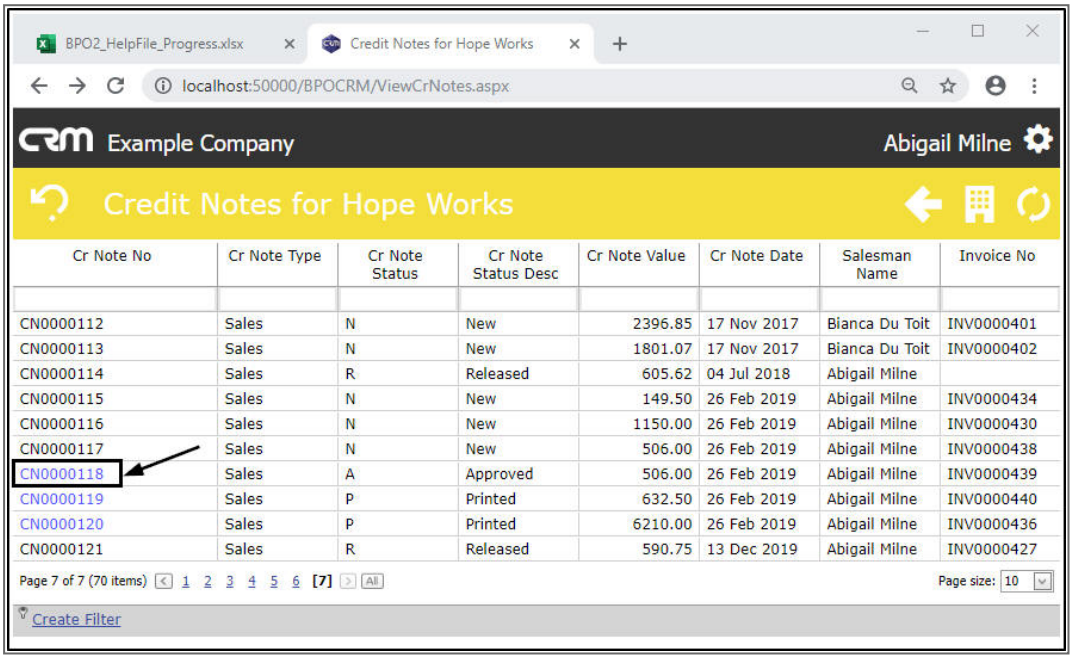
VIEW, DOWNLOAD OR PRINT CUSTOMER CREDIT NOTE

- 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
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CN0000121	Sales	R	Released	590.75	13 Dec 2019	Abigail Milne	INV0000427

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

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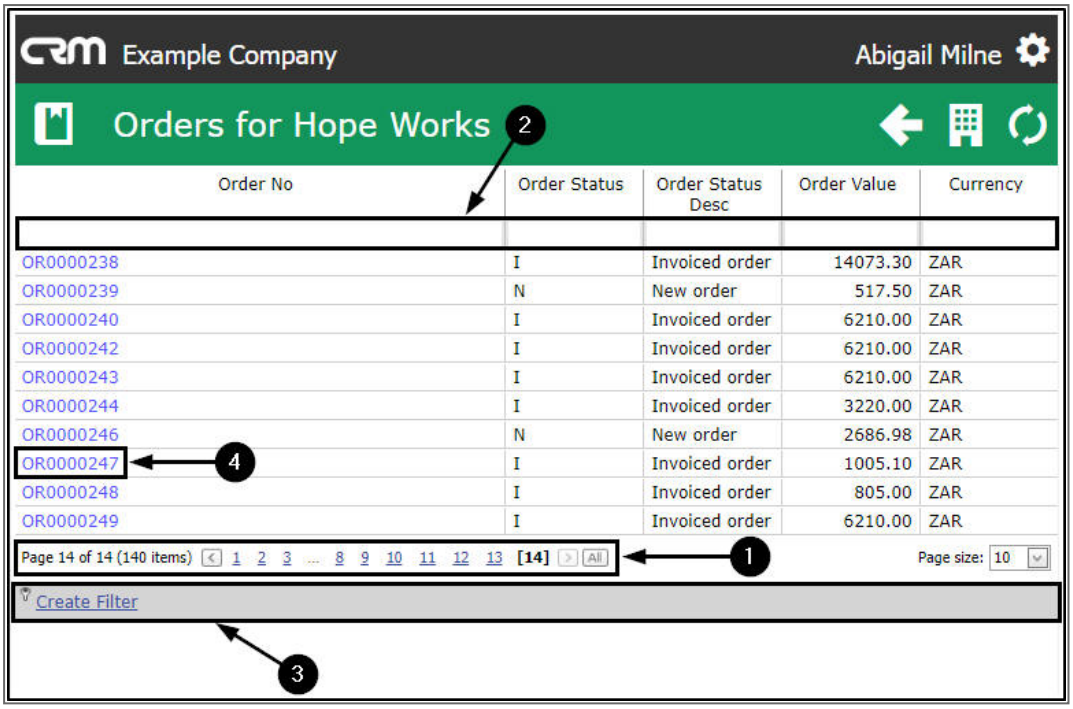

1. The ***Report Viewer and Emailer*** page will open.
2. The selected Credit Note will be displayed.
3. Here you can ***Download*** the Credit Note and/or
4. ***Print*** the Credit Note.

EMAIL CREDIT NOTE

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

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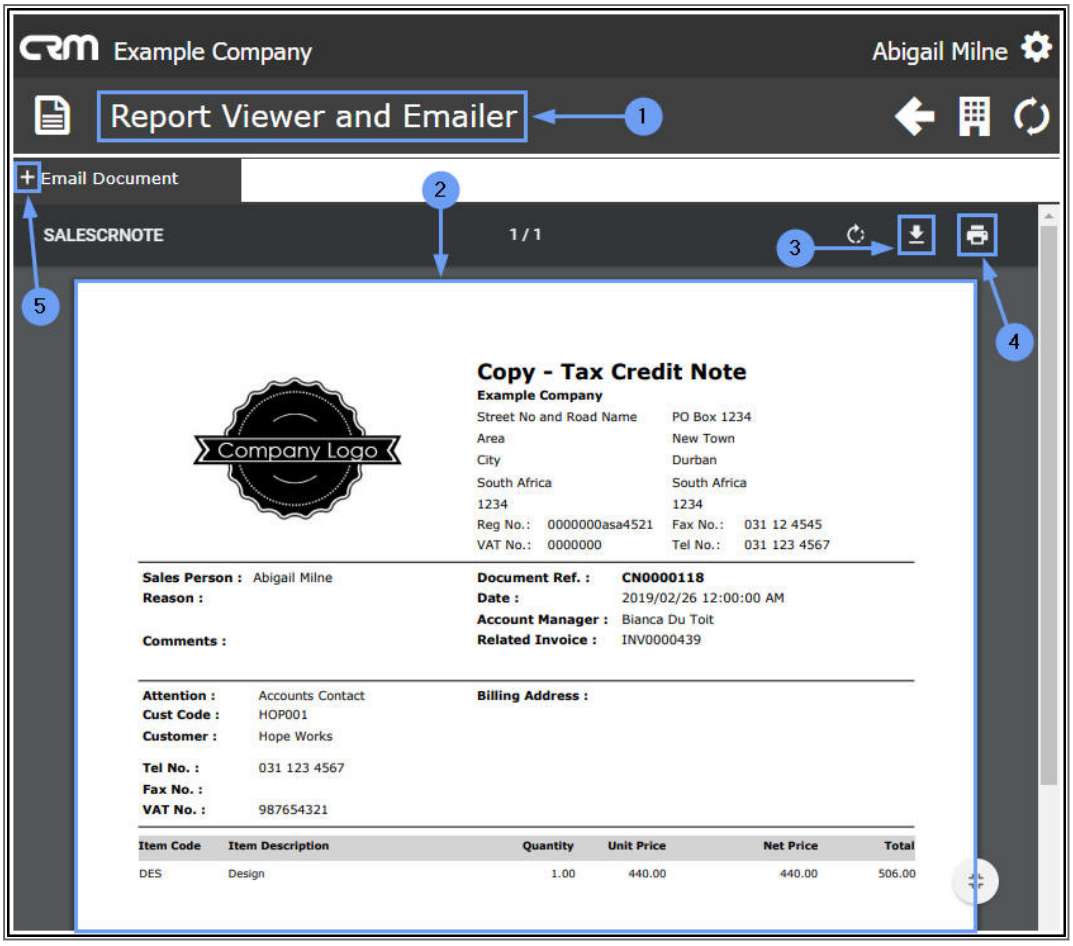

1. The ***Email Document*** frame will be expanded.

   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.

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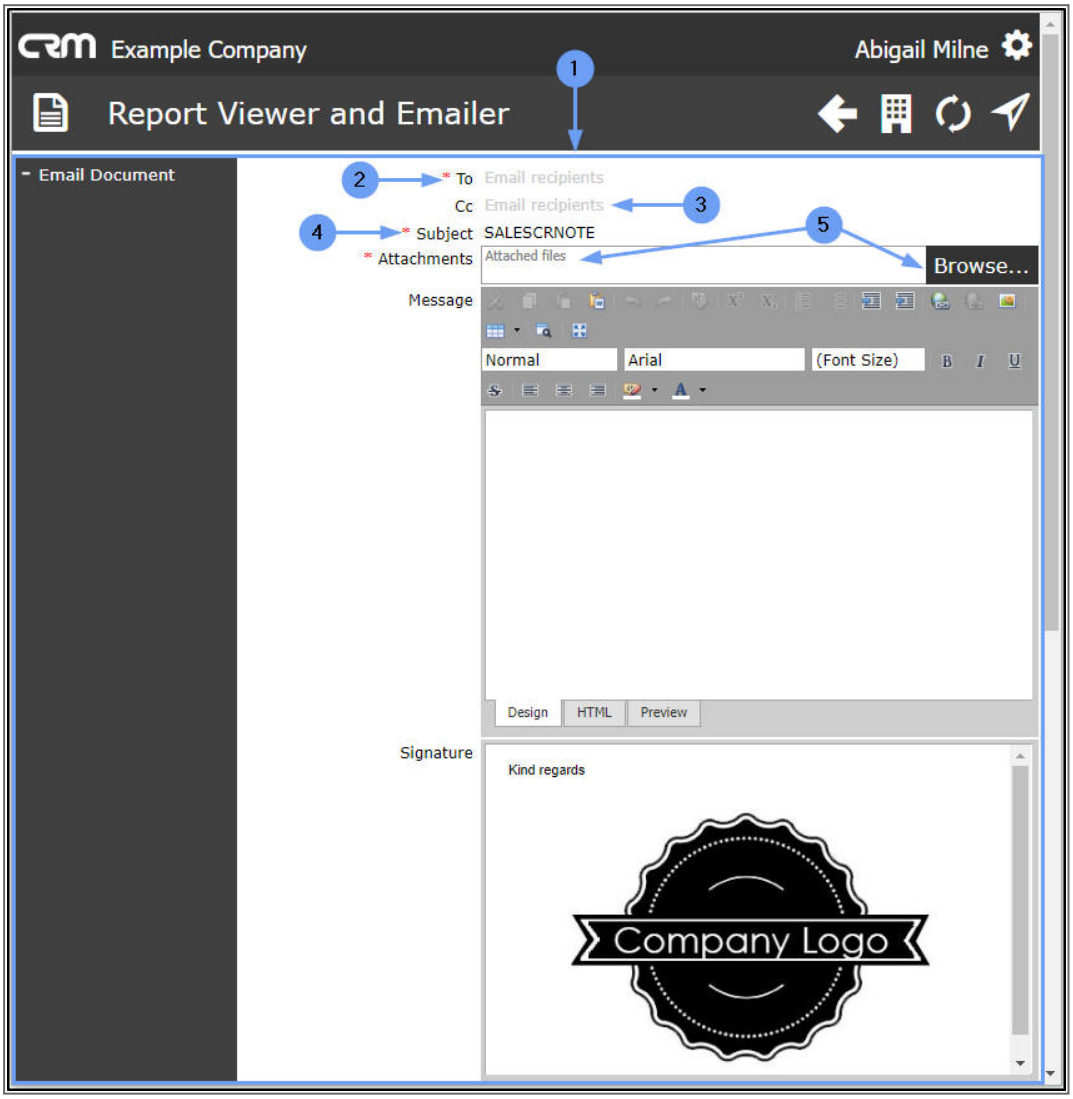
ADD AN ATTACHMENT

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*** .

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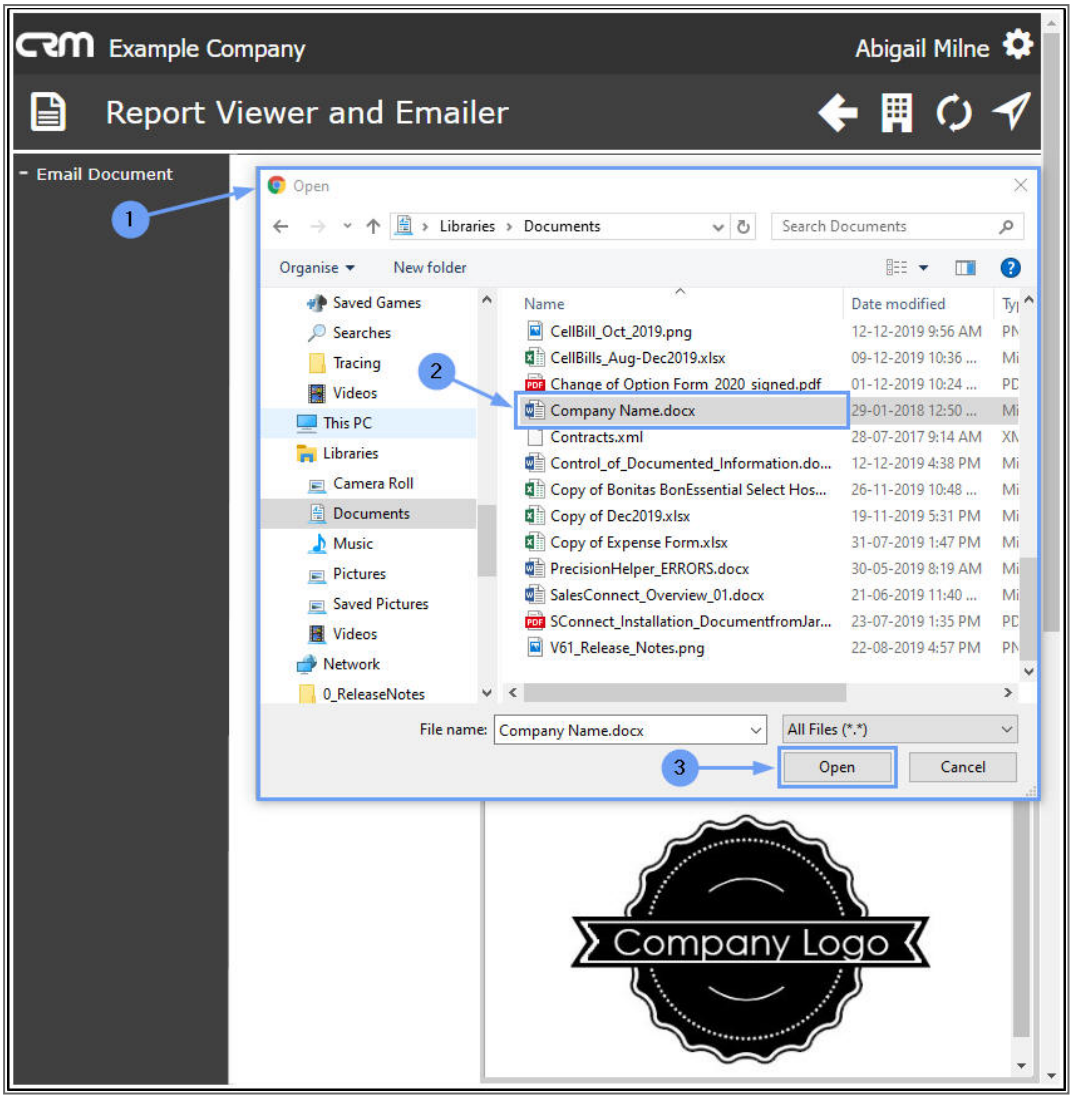

1. The file will now be attached to the email.
2. You can delete the attachment if required by clicking on either of the ***Delete*** icons.

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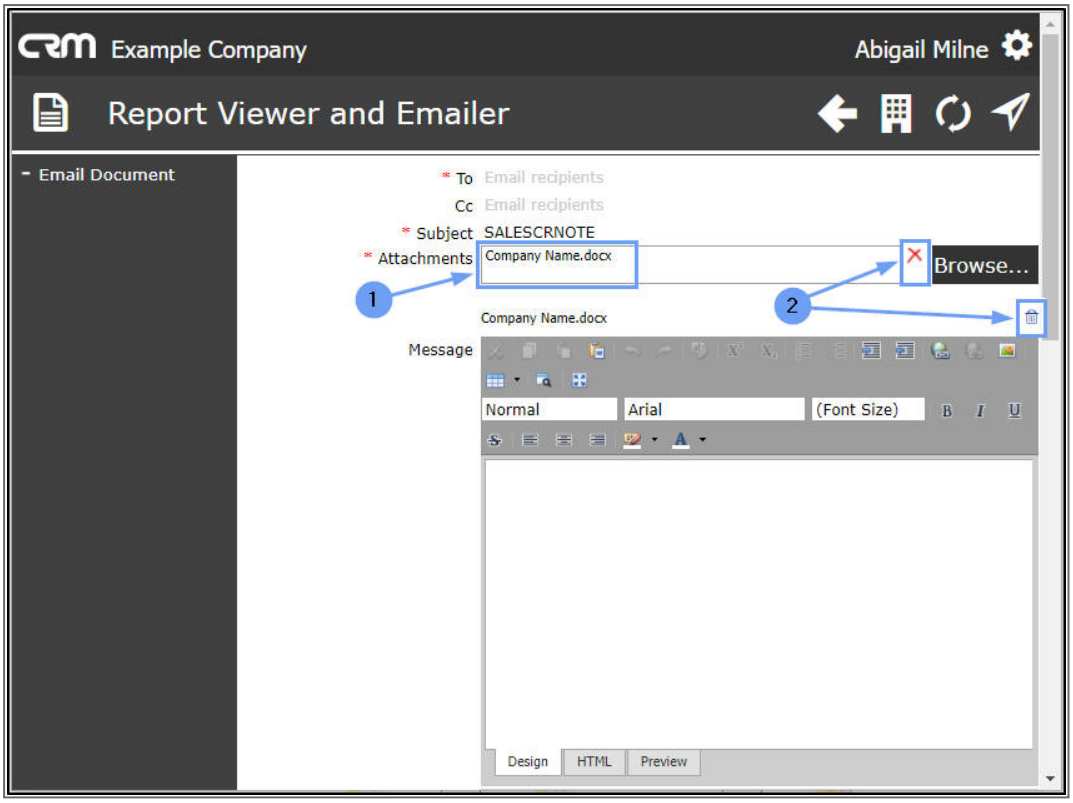

1. Type a relevant message in the ***Message*** body.
2. The ***Message tool bar*** can be used to customise your email message.
3. **Signature**: If you have a Signature configured in CRM - your Signature will pull through here, otherwise the Company default CRM mail signature will pull through.
4.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

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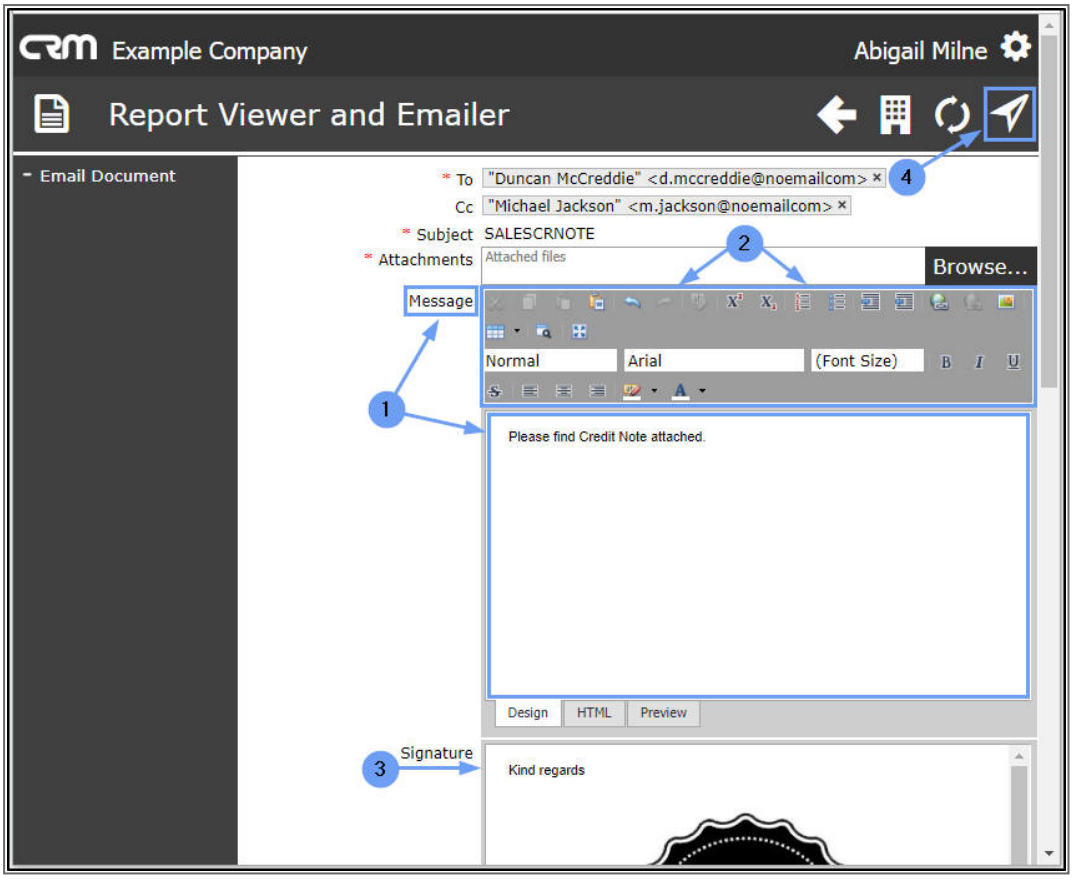

1. A ***message box*** will pop up informing you of the status of the sent email.
2. Click on ***Back***.

*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**********

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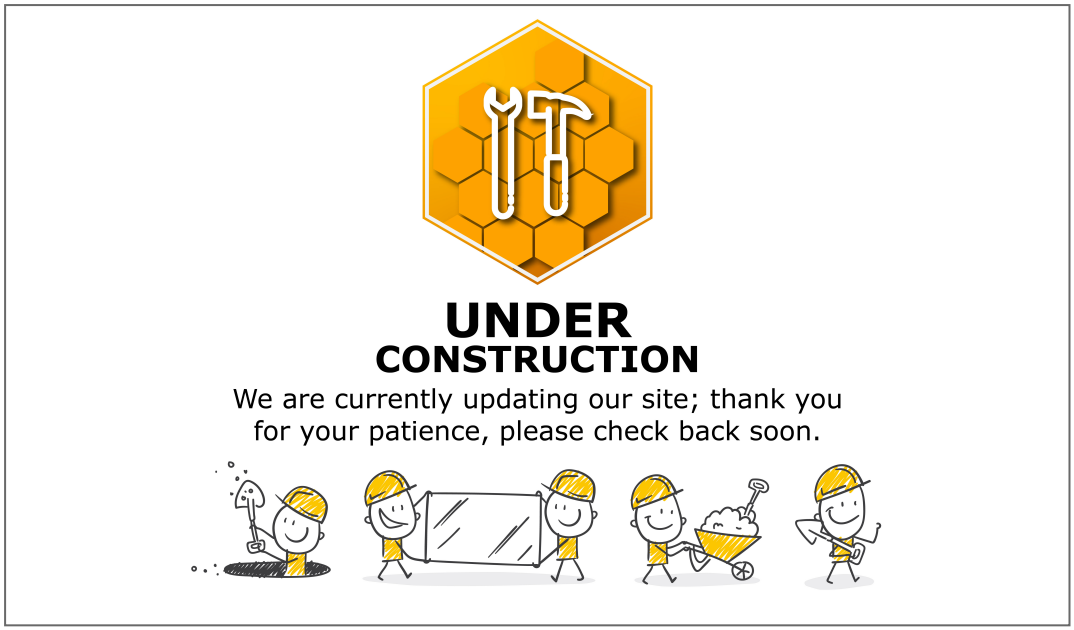

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