



SALES

CUSTOMERS - PRINT CUSTOMER STATEMENT

When using the **'Email'** option to send a Customer Statement, note that it will be emailed via the **BPO Email Service** on the **server** and <u>not</u> from Microsoft Outlook on your desktop.

Ribbon Access: Sales > Customers



- 1. The *Customer Listing* screen will be displayed.
- 2. Select the *Site* where the Customer can be located.
 - The example has *Durban* selected.
- 3. Select the *Status* of the Customer you wish to print a Statement for.

You can print a Customer Statement from any Status.

- The example has *Active* selected.
- 4. Click on the *row* of the *Customer* you wish to print a statement for.
- 5. Click on *Print Statement*.



Print Customer Statement

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	OFF001	RE	Office Supplies Unlimited			Durban	75,000,000.00	www.cnn.co.za	031 789 4561	987456321	
Contacts	YES001	CO	Young Electric			Durban	100,000.00		082555555	2314687641	
	WES001	RE	Westwood Dynamic			Durban	10,000,000.00	www.web.co.za	031 789 4561	123456789	
	TIA001	RE	Titan Group			Durban	100,000.00	www.web.co.za	031 852 9632	123258741369	
Addresses	BOT0001	Π	Bothas Networking inc			Durban	50,000.00	www.web.co.za	031 789 4563	9874563201	
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	LIT0001	RE	Little Bee Honey			Durban	0.00	www.bee.co.za	031 123 4567	123456789	
Project History	GRE001	RE	Green Tea Supplies			Durban	75,000.00		031 456 7891	123456789	
	FIN0001	RE	Fine Hair Salon			Durban	0.00	www.finehair.co.za	031 123 4567	1234	
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- 6. The *Choose Date* screen will be displayed.
- Statement Date: Type in the date or click on the down *arrow* to select the date using the *Calender* function.
- 8. Click on *OK*.

Home Equi	oment / Locations		inance / HR	Inventory	Mair	ntenand	e / Projects	Man	ufacturi	ng	Procur	ement	Sa		Service	Rep		lities	-	æ
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- 9. The *Select the option as desired* screen will display.
 - Print Customer Statement will open the Statement in

the Preview screen to view, print, export or email.

- Email Customer Statement will allow you to add recipients and the system will create a .pdf of the Statement as an Attachment to the email.
- Print and Email Invoice will display both the Report Preview and Email screens.

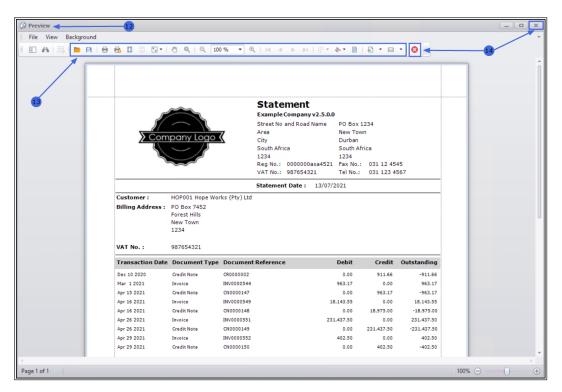
PRINT CUSTOMER STATEMENT

- 10. To print the Statement, click on the *Print Customer Statement* radio button.
- 11. Click on *Accept*.

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	BET0001	RE	Betties Summer Shop at t			Durban	0.00			1234	
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- 12. The Customer Statement will display in the *Preview* screen.
- 13. From the preview screen you can make cosmetic changes to the Statement, as well as *Save*, *Zoom*, *Add a Watermark*, *Export* or *Email*.
- 14. Click *Close* to return to the *Customer* listing screen.



EMAIL CUSTOMER STATEMENT

If you get an *error* when trying to email the statement, 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.

- 10. From the Select the option as desired screen,
- 11. Click on the *Email Customer Statement* radio button.
- 12. Click on *Accept*.



Ŧ			Customer Listin	g - BPO: Vers	ion 2.5.0.3	- Example Con	npany v2.5.0.0			
Home Equip	ment / Locations	Contract Fi	inance / HR Inventory	Maintenanc	e / Projects	Manufacturi	ng Procurement	Sales Service	Reporting Utilities	- 8
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	FIN0001	RE	Fine Hair Salon			Durban	0.00	www.finehair.co.za	031 123 4567	1234
	BET0001	RE	Betties Summer Shop at t			Durban	0.00			1234
History	biancad	RE	North West Branch			Durban	0.00			0
	DAN002	Π	Dancing Shoes			Durban	10,000.00		031 123 4567	123456789
	4									

13. The *Email Sales Invoice: INV[invoice number]* screen will display, for both Email Invoice or Print and Email Invoice options.

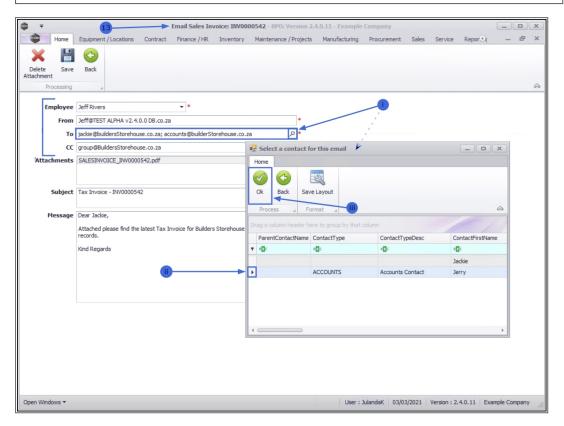
EMAIL HEADER

- **Employee:** The employee who is currently logged on will display in the employee field. Click on the down **arrow** to choose an alternative employee name, if required.
- From: The email address of the employee will display in this field.
- To: To add a contact email address
 - i. Click on the **search button** to display the *Select a contact for this email* screen.
 - ii. Click on the row of the email address of the *CustomerContact* you wish to add.
 - iii. Click on OK.
- **CC:** If a group email address has been set up on the order or accounts contact, then the group email address will display here.



Note that additional email addresses can be added to either the **To**: or **CC**: by separating the email address with a [;].

The example has the accounts contact person added to **To**:*jack-ie@builderStorehouse.co.za; accounts@builderStorehouse.co.za.*



EMAIL ATTACHMENTS

• Attachments: BPO will create a PDF of the order and attach it automatically (you can attach additional documentation if required).

Note: If there are outstanding parts that have not been issued, a Back Order report will also be attached.



- i. To add an additional attachment, click on the *search* button in the *Attachments* field to display the *Select File* window.
- ii. You can *browse* to find the file location of the document you wish to attach, then **click** on the file to select it.
- iii. Once you have selected the file, click on **Open**.

\$ =		Email Sales Inv	voice: INV000	0542 - BPO: Version 2.	4.0.11 - Example	Company				-	X
Home	Equipment / Locations C	Contract Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Repor	- 1	5 ×
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Attachment											
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Open Windows 🔻					1			Оре	in	Cancel	

iv. The document has been added as an *Attachment*.



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Open Windows 🔻							User :	JulandaK 03/0	3/2021	Version : 2	.4.0.11 Ex	ample Company

Delete Attachment

You may choose to delete an obsolete or incorrectly attached document.

- 1. Click on the *attachment* you wish to remove.
- 2. Click on *Delete Attachment*.



\$ •	Email Sales Invoice	:: INV0000542 - BPO: Version 2.4	.0.11 - Example Company	_ — X
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То	jackie@buildersStorehouse.co.za; accounts@builderStoreho	ouse.co.za 🖉 *		
cc	group@BuildersStorehouse.co.za	م		
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Subject	Tax Invoice - INV0000542	*		
Message	Dear Jackie,			
	Attached please find the latest Tax Invoice for Builders Stor	ehouse for your		
	records.			
	Kind Regards			
		Y		
Open Windows 🕶			User : JulandaK 03/03/2021	Version : 2.4.0.11 Example Company

EMAIL SUBJECT AND MESSAGE

- **Subject**: Type the email subject line. Remember that this will be the first thing relating to your email that the Customer sees.
- Message: Type an email text message.

SAVE EMAIL

14. Once you have completed your email, click *Save*.



\$ =		Email Sales In	voice: INV000	00542 - BPO: Version 2	4.0.11 - Example	Company				_ D X
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Delete Attachment	Back	-7								\$
Employee	Jeff Rivers	*								
From	Jeff@TEST ALPHA v2.4.0.	0 DB.co.za		+						
То	jackie@buildersStorehouse	.co.za; accounts@builderSt	orehouse.co.z	a ,p *						
cc	group@BuildersStorehouse	e.co.za		م						
Attachments	SALESINVOICE_INV00005	42.pdf		م						
Subject	Tax Invoice - INV0000542			*						
Message	Dear Jackie, Attached please find the la records. Kind Regards	atest Tax Invoice for Builder	s Storehouse fi	or your *						
Open Windows 🕶					User :	JulandaK 03/0	3/2021	Version : 2.	4.0.11 Ex	ample Company

- 15. You will return to the *Sales Invoices* listing screen.
- 16. The Sales Invoice will now be available in the *Printed* Status list.
 - Click on the down **arrow** to change the *Status* to *Printed*.



Print Customer Statement

Home Equipment / I		tract Finance /	HR Inventory Ma	-	jects Manufacturi	ng Procuremen	nt Sales	Service R	Repor 🕃 — 🖻	7
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	 INV0000542 		Builders Storehouse		PO: 540		Printed	ZAR		
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	INV0000534	PAN001	Panda Copiers		test	190.00	Printed	USD	CN0000145 (N)	
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	INV0000532	PIN0001	Pink Shoes		test	0.00	Printed	ZAR		
	INV0000531	PIN0001	Pink Shoes		test	0.00	Printed	ZAR		
	INV0000530	HOP001	Hope Works (Pty) Ltd		test	74.89	Printed	ZAR		
	INV0000529	HOP001	Hope Works (Pty) Ltd		test	0.00	Printed	ZAR		
	INV0000528	PIN0001	Pink Shoes		Swap out Invoice	5,175.00	Printed	ZAR		
	INV0000526	PIN0001	Pink Shoes		new copier	241,895.60	Printed	ZAR		
	INV0000525	BIG0001	Big Bargains		Test email	602.60	Printed	ZAR		
	INV0000524	HOP001	Hope Works (Pty) Ltd		test	14,651.95	Printed	ZAR	CN0000139 (P)	
	INV0000523	HOP001	Hope Works (Pty) Ltd		test	14,674.90	Printed	ZAR	CN0000138 (P)	
	INV0000522		Titan Group		1234		Printed	ZAR		
	INV0000521		Get Up and Go		test		Printed	ZAR		
	INV0000520		Get Up and Go		1234	1,104.00		ZAR		
	INV0000519		Get Up and Go		1234		Printed	ZAR		
	INV0000518	NEW102	New Customer		test	621.00	Printed	ZAR		
	4									

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