

## SERVICE

### CALLS - INVOICE A CALL

When Call Invoices are raised, remember the following:

Parts, Labour, Sub-Contracts and Expenses must be logged against the call before invoicing. These items cannot be added to the invoice.

Internal Services, Travel and Warranties can be added to the invoice.

The invoice must be printed in order for the transaction to post to Pastel.

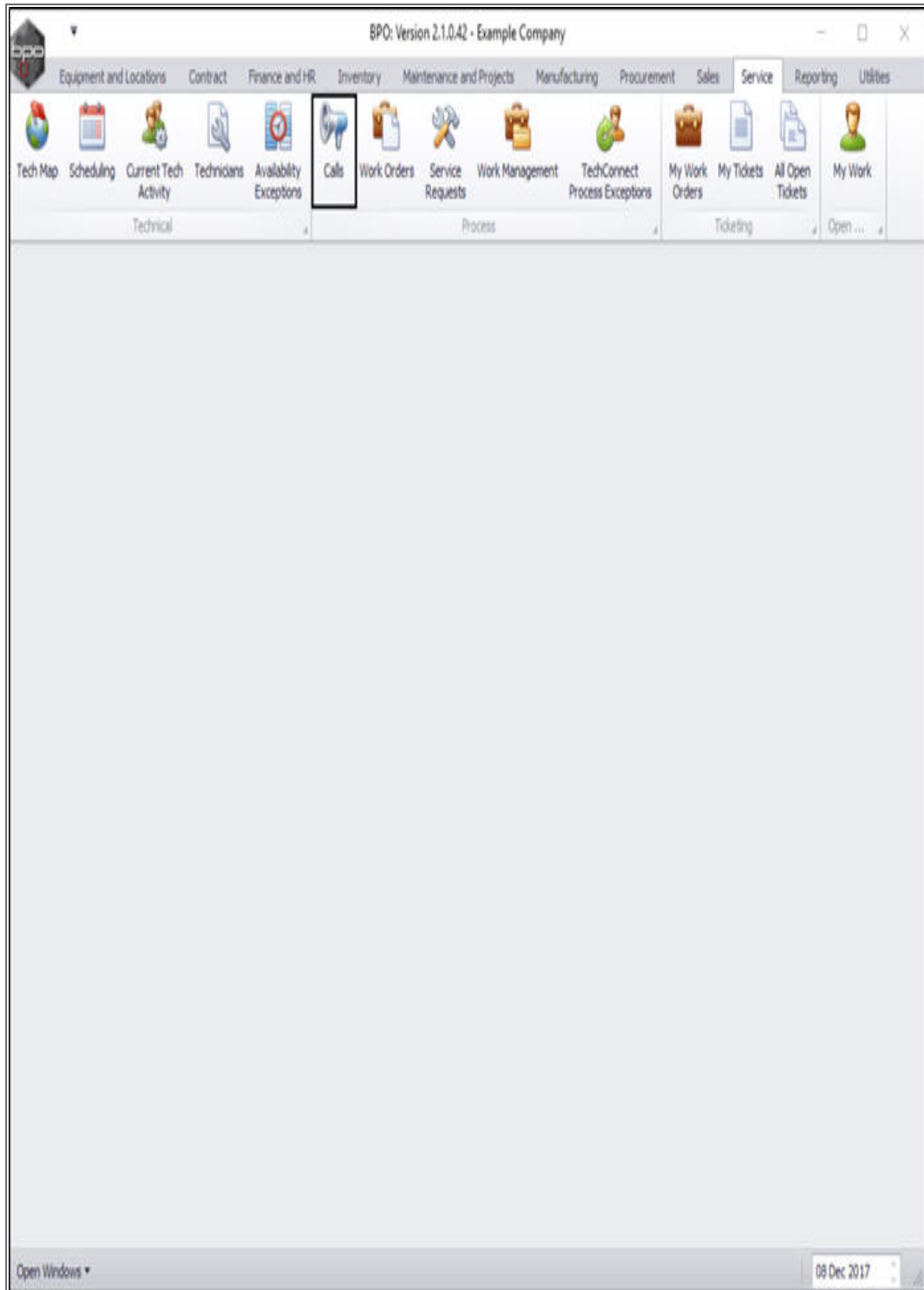
The first time an invoice is printed, it will state: **Tax Invoice**. Each time thereafter, it will state **Copy-Tax Invoice**.

If you need to re-print an original Tax Invoice due to a network connection issue, etc. then you will need to use the [Print Queue Reprint](#) functionality.

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**Ribbon Access:** *Service > Calls*

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The **Call Listing** screen will be displayed.

- Select the **site** and **status**.
  - In this image, **Durban** has been selected as the site and the status has been set to **New**.

CallRefere...	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	SerialNo
CH0000507	12 Dec 2017	13:17:05	Paper not feeding throu...	REP	Repair	New	UnAssigned		2020-103...
CH0000506	12 Dec 2017	12:17:21	Paper Jam machine has s...	REP	Repair	New	UnAssigned		12-98765
CH0000505	12 Dec 2017	11:18:00	Service required urgently	SERV	Service	New	Awaiting Acceptance	Jade Rivers	14-9652365
CH0000504	22 Nov 2017	12:46:33	HW001111	NDR	New Deal Rental	New	UnAssigned		
CH0000500	21 Jun 2017	12:06:28	NDS - Test Credit and ret...	NDS	New Deal Sale	New	UnAssigned		
CH0000499	21 Jun 2017	10:01:09	1234	NDS	New Deal Sale	New	Awaiting Acceptance	Ben John...	
CH0000498	20 Jun 2017	12:08:13	Test call for swap out - in...	PR	Parts Requirem...	New	UnAssigned		2020-102...
CH0000497	20 Jun 2017	08:27:27	Test edit call linked to ass...	TEST	Testing	New	Awaiting Acceptance	Joel James	14-9652365
CH0000496	19 Jun 2017	12:14:44	TT002 - Weekly - Call per...	SM	Scheduled Man...	New	Awaiting Acceptance	Belinda S...	
CH0000495	19 Jun 2017	12:03:24	TT071 - 2 Weekly - Call p...	SM	Scheduled Man...	New	Awaiting Acceptance	Belinda S... in123	
CH0000493	15 Jun 2017	12:28:25	Test OnNote Totals for Pri...	NDS	New Deal Sale	New	UnAssigned		
CH0000489	07 Jun 2017	12:45:24	test	NDS	New Deal Sale	New	UnAssigned		
CH0000488	06 Jun 2017	10:20:09	Test creating a call with L...	INST	Installation	New	UnAssigned		
CH0000486	01 Jun 2017	15:06:59	Call - Orders	NDR	New Deal Rental	New	UnAssigned		
CH0000483	31 May 2017	18:18:35	Boless Quick Part Return	DR	Select Call Type	New	UnAssigned		20-852963
CH0000481	31 May 2017	15:11:20	Quick Part Return v2..0.7	PR	Parts Requirem...	New	UnAssigned		20-852963
CH0000480	29 May 2017	13:21:39	Test call with a location.	TEST	Testing	New	Awaiting Acceptance	Susan D...	
CH0000479	26 May 2017	15:03:59	Test saving a call linked t...	PR	Parts Requirem...	New	UnAssigned		14-9652365
CH0000478	25 May 2017	15:03:21	Invoice test v2.L0.6 - P...	PR	Parts Requirem...	New	UnAssigned		2020-43257
CH0000475	25 May 2017	09:16:05	Swap out - asset on a sh...	DR	Select Call Type	New	UnAssigned		test1987654
CH0000474	25 May 2017	08:40:54	Installation at client site	INST	Installation	New	UnAssigned		18-30200
CH0000473	25 May 2017	08:34:59	Contract Service v2.L0.5	IT	IT Requirement	New	UnAssigned		1020-10102
CH0000472	24 May 2017	14:38:10	Contract Service Test v2...	SERV	Service	New	UnAssigned		2020-43256
CH0000467	24 May 2017	09:29:20	Call - Loan Unit Request ...	REP	Repair	New	UnAssigned		20-852963
CH0000464	23 May 2017	08:54:25	Loan Unit Return v2.L...	REP	Repair	New	UnAssigned		20-852963

## SELECT THE CALL

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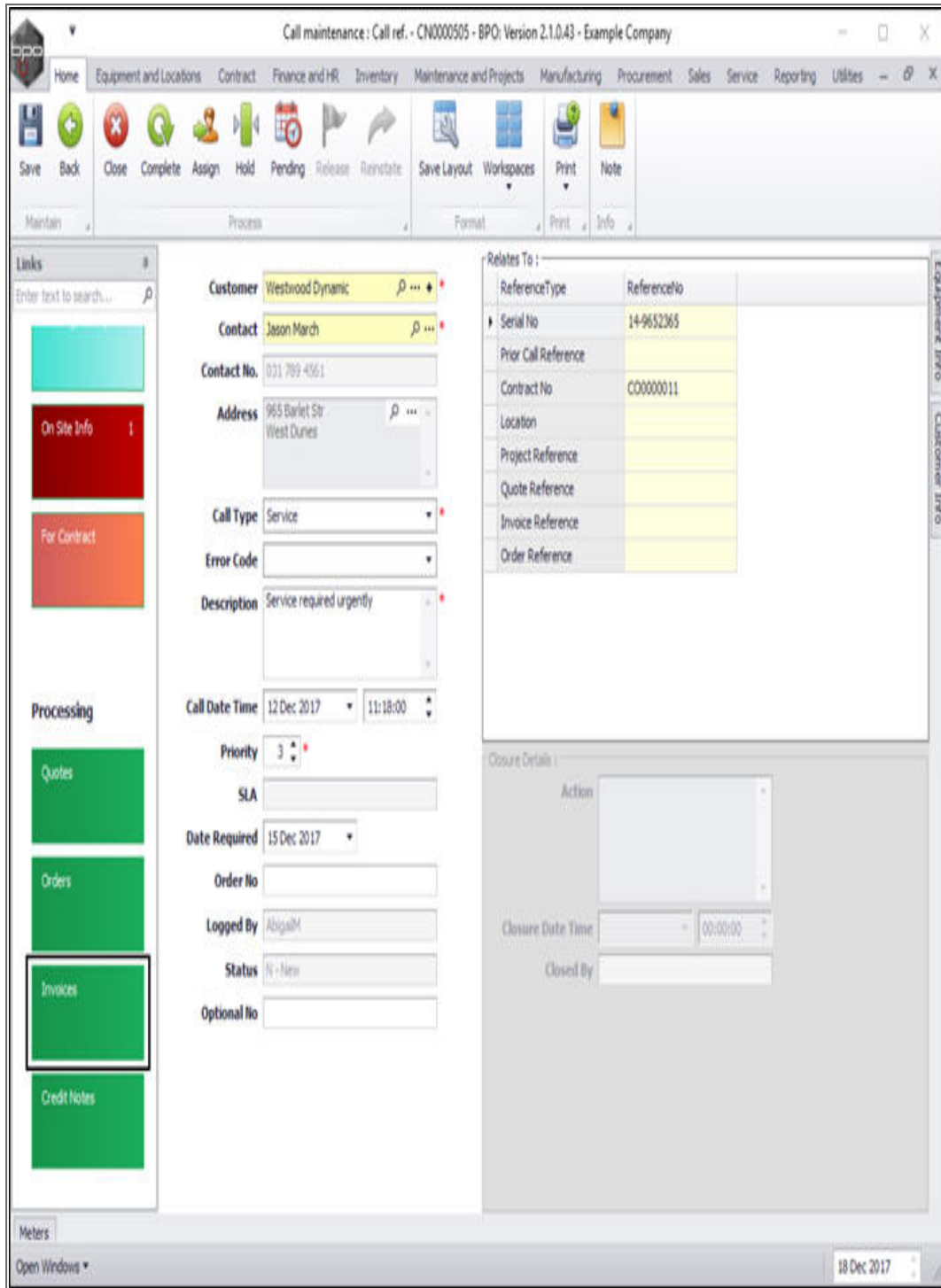
- Click on the *row selector* in front of the *call* you wish to raise an *invoice* for.
- Click on *Edit*.

Information	No Of Calls
Durban	48
New	25
In Progress	6
Hold	3
Pending	1
Complete	10
All	48
Pretoria	0
New	0
In Progress	0
Hold	0
Pending	0
Complete	0
All	0

CallRefere...	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	SerialNo
CH0000507	12 Dec 2017	13:17:05	Paper not feeding throu...	REP	Repair	New	UnAssigned		2020-103...
CH0000506	12 Dec 2017	12:17:21	Paper Jam machine has s...	REP	Repair	New	UnAssigned		12-98765
CH0000505	12 Dec 2017	11:18:00	Service required urgently	SERV	Service	New	Awaiting Acceptance	Jade Rivers	14-9652365
CH0000504	22 Nov 2017	12:46:33	HW001111	NDR	New Deal Rental	New	UnAssigned		
CH0000500	21 Jun 2017	12:06:28	NDS - Test Credit and ret...	NDS	New Deal Sale	New	UnAssigned		
CH0000499	21 Jun 2017	10:01:09	1234	NDS	New Deal Sale	New	Awaiting Acceptance	Ben John...	
CH0000498	20 Jun 2017	12:08:13	Test call for swap out - in...	PR	Parts Requirem...	New	UnAssigned		2020-102...
CH0000497	20 Jun 2017	08:27:27	Test edit call linked to ass...	TEST	Testing	New	Awaiting Acceptance	Joel James	14-9652365
CH0000496	19 Jun 2017	12:14:44	TT002 - Weekly - Call per...	SM	Scheduled Man...	New	Awaiting Acceptance	Belinda S...	
CH0000495	19 Jun 2017	12:03:24	TT071 - 2 Weekly - Call p...	SM	Scheduled Man...	New	Awaiting Acceptance	Belinda S... sin123	
CH0000493	15 Jun 2017	12:28:25	Test C/Note Totals for Pri...	NDS	New Deal Sale	New	UnAssigned		
CH0000489	07 Jun 2017	12:45:24	test	NDS	New Deal Sale	New	UnAssigned		
CH0000488	06 Jun 2017	10:20:09	Test creating a call with l...	INST	Installation	New	UnAssigned		
CH0000486	01 Jun 2017	15:06:59	Call - Orders	NDR	New Deal Rental	New	UnAssigned		
CH0000483	31 May 2017	16:18:35	Bless Quick Part Return	DR	Select Call Type	New	UnAssigned		20-852963
CH0000481	31 May 2017	15:11:20	Quick Part Return v2.0.7	PR	Parts Requirem...	New	UnAssigned		20-852963
CH0000480	29 May 2017	13:21:39	Test call with a location.	TEST	Testing	New	Awaiting Acceptance	Susan D...	
CH0000479	26 May 2017	15:03:59	Test saving a call linked t...	PR	Parts Requirem...	New	UnAssigned		14-9652365
CH0000478	25 May 2017	15:03:21	Invoice test v2.1.0.6 - F...	PR	Parts Requirem...	New	UnAssigned		2020-43257
CH0000475	25 May 2017	09:18:05	Swap out - asset on a sh...	DR	Select Call Type	New	UnAssigned		test987654
CH0000474	25 May 2017	08:40:54	Installation at client site	INST	Installation	New	UnAssigned		18-30200
CH0000473	25 May 2017	08:34:59	Contract Service v2.1.0.5	IT	IT Requirement	New	UnAssigned		1020-10102
CH0000472	24 May 2017	14:38:10	Contract Service Test v2...	SERV	Service	New	UnAssigned		2020-43256
CH0000467	24 May 2017	09:29:20	Call - Loan Unit Request ...	REP	Repair	New	UnAssigned		20-852963
CH0000464	23 May 2017	08:54:25	Loan Unit Return v2.1...	REP	Repair	New	UnAssigned		20-852963

The **Call maintenance: Call ref. - [ ]** screen will be displayed.

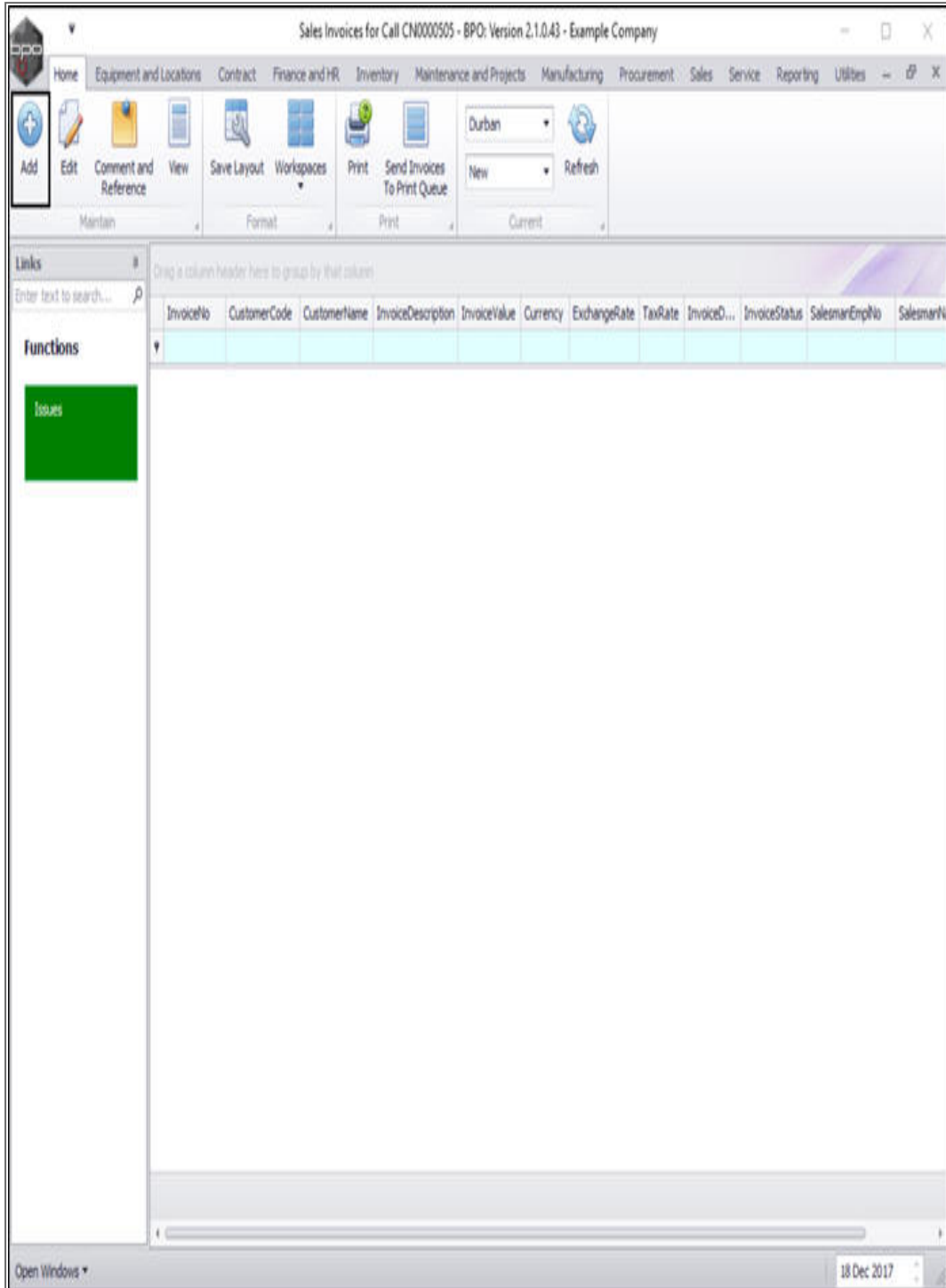
- Click on the **Invoices** tile.



The **Sales Invoices for Call [ ]** screen will be displayed.

## ADD AN INVOICE TO THE CALL

- Click on **Add**.



The *Add new Customer Invoice* screen will be displayed.

## CUSTOMER INFO

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- **Customer Name:** This will auto populate with the customer linked to this call.
- **Contact Name:** This will auto populate with the contact linked to this call but you can click on the search button and select an alternative contact if required.
- **Commercial:** This is the default commercial as configured on the customer. A different commercial can be selected if required
- **Salesman:** This will auto populate with the person currently creating the invoice but you can click on the search button and select an alternative salesman if required.
- **Reference:** Type in a reference for the invoice.
- **Status:** This will auto populate as New.
- **Date and Time:** These will auto populate with the current date and time but
  - **Date:** You can either type in or click on the drop down arrow and use the calendar function to select an alternative date if required
  - **Time:** You can either type in or use the arrow indicators to select an alternative time if required.



Add new Customer Invoice - BPO: Version 2.1.0.43 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Delete Item | Save Layout | Print

Customer Name: Westwood Dynamic | Reference: | Status: New | Billing address: PO Box 1245 West Dunes

Contact Name: Jason March | Date & Time: 20 Dec 2017 12:15:43 | Shipping address: 965 Barlet Str West Dunes 2345

Commercial: Default | Salesman: Sarah Milder | Billing Customer: Westwood Dynamic | Billing Contact: Jason March

Invoice Currency: South African Rand | Exchange Rate: 1 | Tax Rate: 14 |  Suppress Line Detail on Print

ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchNumber	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCoPrice	TaxRate	Department	SuppressOnPrint	Status
Parts	14788...	K147 Black toner	K147 Black toner	Man Warehouse		1.00	310.29	0.00	0.00	360.00	360.00	14.00		<input type="checkbox"/>	A
Expenses	TOLL	Marianhill Toll Fee...	Marianhill Toll Fee x 2			1.00	55.00	0.00	0.00	55.00	55.00	14.00		<input type="checkbox"/>	A
Select type...														<input type="checkbox"/>	

Comment:

Sub Total: 415.00  
VAT: 58.10  
Grand Total: 473.10

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## BILLING INFO

- **Billing Customer:** Click on the search button and select the billing customer.

- **Billing Contact:** Click on the search button and select the billing contact.
  - **Note:** The Main customer is the customer where the machine is located. The Billing customer is the customer who is paying for this invoice.

Add new Customer Invoice - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Print

Customer Name: Westwood Dynamic Reference: Status: New Date & Time: 20 Dec 2017 12:15:43

Contact Name: Jason March Billing address: PO Box 1245 West Dunes

Commercial: Default Billing Customer: Westwood Dynamic Billing Contact: Jason March Shipping address: 965 Barlet Str West Dunes 2345

Salesman: Sarah Milder Invoice Currency: South African Rand Exchange Rate: 1 Tax Rate: 14 % Suppress Line Detail on Print

ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchNumber	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCoPrice	TaxRate	Department	SuppressOnPrint	Status
Parts	14788...	K147 Black toner	K147 Black toner	Man Warehouse		1.00	310.29	0.00	0.00	360.00	360.00	14.00		<input type="checkbox"/>	A
Expenses	TOLL	Marianhill Toll Fee...	Marianhill Toll Fee x 2			1.00	\$5.00	0.00	0.00	\$5.00	\$5.00	14.00		<input type="checkbox"/>	A
Select type...														<input type="checkbox"/>	

Comment: Sub Total: 415.00 VAT: 58.10 Grand Total: 473.10

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## FINANCIAL INFO

- **Invoice Currency:** This will populate based on the currency set up on the customer. Use the drop down arrow to display the

currency menu and select a different currency if required.

- **Tax Rate:** This will populate based on the tax rate set up on the customer. Type in or use the directional arrows to select an alternative rate if required.
- **Exchange Rate:** This will populate based on the exchange rate configured on the system. Type in or use the directional arrows to select a new exchange rate if required.

Add new Customer Invoice - BPO: Version 2.1.0.43 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Delete Item | Save Layout | Print

---

**Customer Name:** Westwood Dynamic    
**Contact Name:** Jason March    
**Commercial:** Default    
**Salesman:** Sarah Milder    
**Billing Customer:** Westwood Dynamic

**Reference:**    
**Status:** New    
**Date & Time:** 20 Dec 2017 12:15:43

**Billing address:** PO Box 1245 West Dunes   
**Shipping address:** 965 Barlet Str West Dunes 2345

**Invoice Currency:** South African Rand   
**Exchange Rate:** 1

**Tax Rate:** 14   
 Suppress Line Detail on Print

Addresses | Related References

ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchNumber	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCoPrice	TaxRate	Department	SuppressOnPrint	Status
Parts	147-88...	K147 Black toner	K147 Black toner	Man Warehouse		1.00	310.29	0.00	0.00	360.00	360.00	14.00		<input type="checkbox"/>	A
Expenses	TOLL	Marianhill Toll Fee...	Marianhill Toll Fee x 2			1.00	55.00	0.00	0.00	55.00	55.00	14.00		<input type="checkbox"/>	A
Select type...														<input type="checkbox"/>	

Comment

**Sub Total:** 415.00  
**VAT:** 58.10  
**Grand Total:** 473.10

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## ADDRESSES

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- Click on the **Addresses** tab.
  - **Billing Address:** Ensure that the billing address is populated, if not, click on the search button and select the billing address.
  - **Shipping Address:** Ensure that the shipping address is populated, if not, click on the search button and select the shipping address.

Add new Customer Invoice - BPO: Version 2.1.0.43 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Delete Item | Save Layout | Print

---

**Customer Name:** Westwood Dynamic  
**Contact Name:** Jason March  
**Commercial:** Default  
**Salesman:** Sarah Milder  
**Billing Customer:** Westwood Dynamic  
**Invoice Currency:** South African Rand  
**Tax Rate:** 14

**Reference:**   
**Status:** New  
**Date & Time:** 20 Dec 2017 12:15:43  
**Billing Contact:** Jason March  
**Exchange Rate:** 1

**Billing address:**  
 PO Box 1245  
 West Dunes

**Shipping address:**  
 965 Barlet Str  
 West Dunes  
 2345

Suppress Line Detail on Print

Addresses | Related References

ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchNumber	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate	Department	SuppressOnPrint	Status
Parts	147-88...	K147 Black toner	K147 Black toner	Man Warehouse		1.00	310.29	0.00	0.00	360.00	360.00	14.00		<input type="checkbox"/>	A
Expenses	TOLL	Marianhill Toll Fee...	Marianhill Toll Fee x 2			1.00	55.00	0.00	0.00	55.00	55.00	14.00		<input type="checkbox"/>	A
Select type...														<input type="checkbox"/>	

Comment:

**Sub Total:** 415.00  
**VAT:** 58.10  
**Grand Total:** 473.10

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## RELATED REFERENCES

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- Click on the ***Related References*** tab.
  - This will display all the reference numbers linked to this invoice.
  - In this image you can see that in this invoice, the initial ***Call no.*** is linked to it as well as a linked ***Serial no.*** and ***Contract no.***



Add new Customer Invoice - BPO; Version 2.1.0.43 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Delete Item | Save Layout | Print

Customer Name: Westwood Dynamic | Reference: | Status: New | Date & Time: 20 Dec 2017 12:26:07

Contact Name: Jason March | Billing Contact: Jason March

Commercial: Default | Salesman: Sarah Milder

Billing Customer: Westwood Dynamic | Invoice Currency: South African Rand | Exchange Rate: 1

Tax Rate: 14 |  Suppress Line Detail on Print

ReferenceType	ReferenceNo
Serial No	14-9652365
Call Reference	CH0000505
Contract No	CO0000011
Location	
Project Reference	
Quote Reference	

ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchNumber	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCoPrice	TaxRate	Department	SuppressOnPrint	Status
Parts	147-88...	K147 Black toner	K147 Black toner	Main Warehouse		1.00	310.29	0.00	0.00	360.00	360.00	14.00		<input type="checkbox"/>	A
Expenses	TOLL	Marianhill Toll Fee...	Marianhill Toll Fee x 2			1.00	55.00	0.00	0.00	55.00	55.00	14.00		<input type="checkbox"/>	A
Select type...														<input type="checkbox"/>	

Comment:

Sub Total	415.00
VAT	58.10
Grand Total	473.10

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- **Scroll down** in the related references panel.
- You will see that a **Work Order no.** is also linked to this invoice.

Add new Customer Invoice - BPO; Version 2.1.0.43 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Delete Item | Save Layout | Print

Customer Name: Westwood Dynamic | Reference: | Status: New | Date & Time: 20 Dec 2017 12:26:07

Contact Name: Jason March | Commercial: Default | Salesman: Sarah Milder | Billing Customer: Westwood Dynamic | Billing Contact: Jason March | Invoice Currency: South African Rand | Exchange Rate: 1

Tax Rate: 14 |  Suppress Line Detail on Print

ReferenceType	ReferenceNo
Location	
Project Reference	
Quote Reference	
Order No	
Work Order Reference	WO0001353

ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchNumber	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCoPrice	TaxRate	Department	SuppressOnPrint	Status
Parts	147-98...	K147 Black toner	K147 Black toner	Main Warehouse		1.00	310.29	0.00	0.00	360.00	360.00	14.00		<input type="checkbox"/>	A
Expenses	TOLL	Marianhill Toll Fee...	Marianhill Toll Fee x 2			1.00	55.00	0.00	0.00	55.00	55.00	14.00		<input type="checkbox"/>	A
Select type...														<input type="checkbox"/>	

Comment:

Sub Total: 415.00  
VAT: 58.10  
Grand Total: 473.10

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## COMMENTS

- Type in a comment in this text box if required.

Add new Customer Invoice - BPO; Version 2.1.0.43 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Delete Item | Save Layout | Print

Customer Name: Westwood Dynamic | Reference: | Status: New | Date & Time: 20 Dec 2017 12:26:07

Contact Name: Jason March | Commercial: Default | Salesman: Sarah Milder | Billing Customer: Westwood Dynamic | Invoice Currency: South African Rand | Exchange Rate: 1

Tax Rate: 14 |  Suppress Line Detail on Print

ReferenceType	ReferenceNo
Serial No	14-9652365
Call Reference	CH0000505
Contract No	CO0000011
Location	
Project Reference	
Quote Reference	

ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchNumber	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCoPrice	TaxRate	Department	SuppressOnPrint	Status
Parts	147-88...	K147 Black toner	K147 Black toner	Main Warehouse		1.00	310.29	0.00	0.00	360.00	360.00	14.00		<input type="checkbox"/>	A
Expenses	TOLL	Marianhill Toll Fee...	Marianhill Toll Fee x 2			1.00	55.00	0.00	0.00	55.00	55.00	14.00		<input type="checkbox"/>	A
Select type...														<input type="checkbox"/>	

Comment: [Empty text box]

Sub Total	415.00
VAT	58.10
Grand Total	473.10

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## INVOICE ITEMS

- You will see that the **Items** data grid has populated with the items initially logged against this call.

Add new Customer Invoice - BPO; Version 2.1.0.43 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Delete Item | Save Layout | Print

Customer Name: Westwood Dynamic | Reference: | Status: New | Date & Time: 20 Dec 2017 12:26:07

Contact Name: Jason March | Billing Contact: Jason March

Commercial: Default | Invoice Currency: South African Rand | Exchange Rate: 1

Tax Rate: 14 | Suppress Line Detail on Print:

ReferenceType	ReferenceNo
Location	
Project Reference	
Quote Reference	
Order No	
Work Order Reference	W0001353

ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchNumber	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCoPrice	TaxRate	Department	SuppressOnPrint	Status
Parts	147-98...	K147 Black toner	K147 Black toner	Main Warehouse		1.00	310.29	0.00	0.00	360.00	360.00	14.00		<input type="checkbox"/>	A
Expenses	TOLL	Marianhill Toll Fee...	Marianhill Toll Fee x 2			1.00	55.00	0.00	0.00	55.00	55.00	14.00		<input type="checkbox"/>	A
Select type...														<input type="checkbox"/>	

Comment:

Sub Total	415.00
VAT	58.10
Grand Total	473.10

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## MARKUP, DISCOUNT AND UNIT SELLING PRICE

- The **Markup**, **Discount** and **Unit Selling Price** pull through from the **Commercial Details** set up on the selected Commercial linked

to this customer, provided that there are no Commercial Exceptions set up on the particular parts, labour or services listed on this invoice.

- In this example, the Commercial linked to this customer is **Default**.

The screenshot shows the 'Add new Customer Invoice' window. The 'Commercial' dropdown is set to 'Default'. The invoice line items table is as follows:

Item Type	Item Code	Item Description	Invoice Line Description	Warehouse Name	Batch Number	Quantity	Unit Cost	Markup	Discount	Unit Selling Price	Base Cost Price	Tax Rate	Department	Suppress On Print	Status
Parts	147-88...	K147 Black toner	K147 Black toner	Main Warehouse		1.00	310.29	0.00	0.00	360.00	360.00	14.00		<input type="checkbox"/>	A
Expenses	TOLL	Marianhill Toll Fee...	Marianhill Toll Fee x 2			1.00	55.00	0.00	0.00	55.00	55.00	14.00		<input type="checkbox"/>	A
Select type...														<input type="checkbox"/>	

Summary Totals:

Sub Total	415.00
VAT	58.10
<b>Grand Total</b>	<b>473.10</b>

## DEPARTMENT

- If the item **department** field has not been populated, click in the text box in the **Department** column to display an **ellipsis** button.

Customer Name: Westwood Dynamic  
 Contact Name: Jason March  
 Commercial: Default  
 Salesman: Sarah Milder  
 Billing Customer: Westwood Dynamic  
 Invoice Currency: South African Rand  
 Tax Rate: 14

Reference: [Empty]  
 Status: New  
 Date & Time: 20 Dec 2017 12:26:07  
 Billing Contact: Jason March  
 Exchange Rate: 1

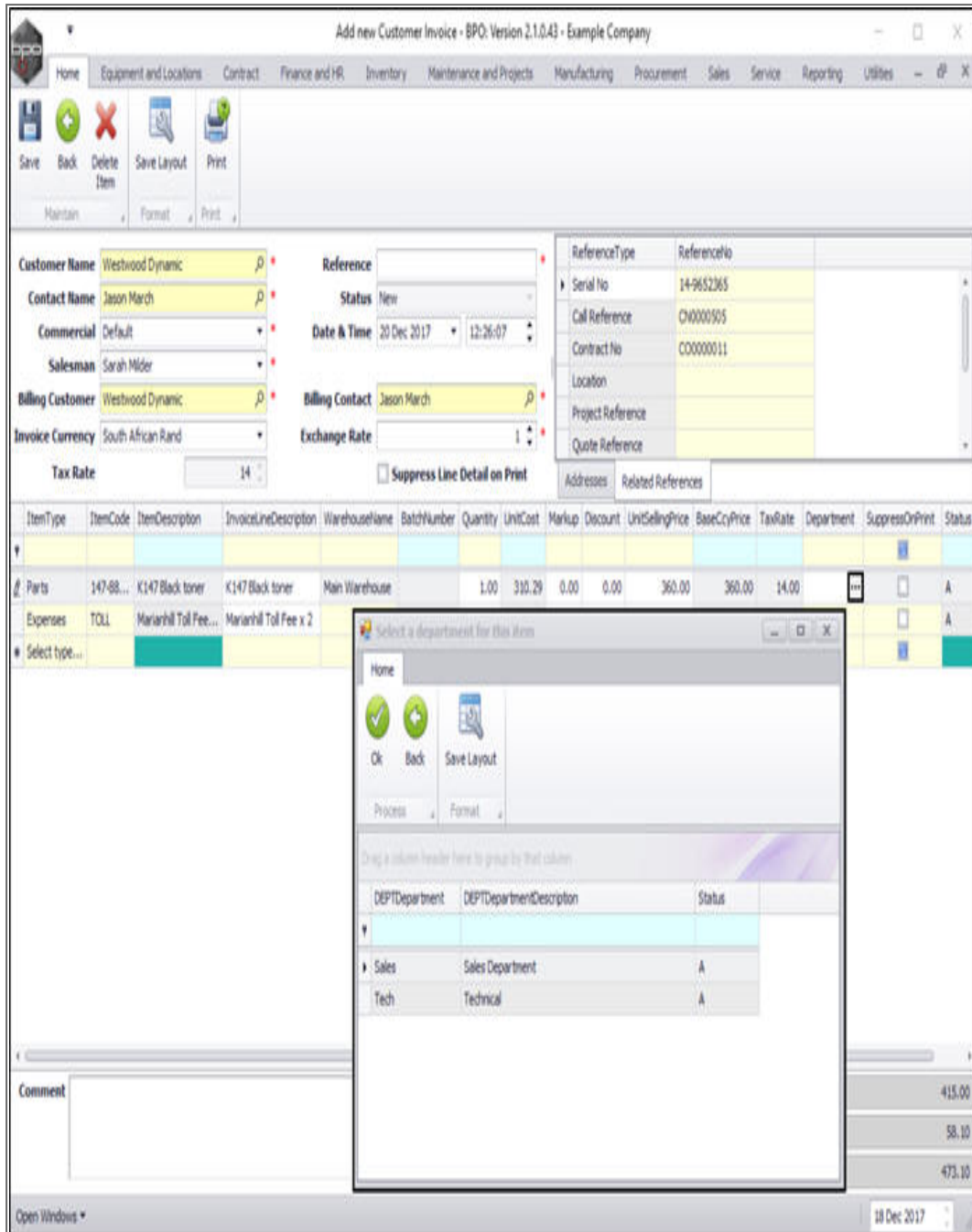
ReferenceType	ReferenceNo
Serial No	14-9652365
Call Reference	CH0000505
Contract No	CO0000011
Location	
Project Reference	
Quote Reference	

ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchNumber	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate	Department	SuppressOnPrint	Status
Parts	147-88...	K147 Black toner	K147 Black toner	Main Warehouse		1.00	310.29	0.00	0.00	360.00	360.00	14.00	...	<input type="checkbox"/>	A
Expenses	TOLL	Marianhil Toll Fee...	Marianhil Toll Fee x 2			1.00	55.00	0.00	0.00	55.00	55.00	14.00		<input type="checkbox"/>	A
Select type...														<input type="checkbox"/>	

Sub Total: 415.00  
 VAT: 58.10  
 Grand Total: 473.10

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- Click on this ellipsis button to display the **Select a department for this item** pop up screen.



- Click on the **row selector** in front of the **department** you wish to **assign** to this **item**.

- Click on **Ok**.

Customer Name: Westwood Dynamic  
 Contact Name: Jason March  
 Commercial: Default  
 Salesman: Sarah Milder  
 Billing Customer: Westwood Dynamic  
 Invoice Currency: South African Rand  
 Tax Rate: 14%

Reference: Status: New, Date & Time: 20 Dec 2017 12:26:07, Billing Contact: Jason March

ReferenceType	ReferenceNo
Serial No	14-9652365
Call Reference	C00000505
Contract No	C0000011
Location	
Project Reference	
Quote Reference	

ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchNumber	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate	Department	SuppressOnPrint	Status
Parts	147-88...	K147 Black toner	K147 Black toner	Main Warehouse		1.00	310.29	0.00	0.00	360.00	360.00	14.00			A
Expenses	TOLL	Marianhill Toll Fee...	Marianhill Toll Fee x 2												A
Select type...															

Comment: 415.00, 58.10, 473.10

Open Windows | 18 Dec 2017



## **SUPPRESS LINE DETAIL ON PRINT**

---

- If you click on the check box next to ***Suppress Line Detail on Print*** this will also hide the Selling Price so that only the invoice totals show.
- Leave all these items ***unselected*** if you do not wish to hide anything on the invoice. This cannot be edited after the invoice has been printed.

Add new Customer Invoice - BPO; Version 2.1.0.43 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Delete Item | Save Layout | Print

Customer Name: Westwood Dynamic | Reference: | Status: New | Date & Time: 20 Dec 2017 12:26:07

Contact Name: Jason March | Billing Contact: Jason March

Commercial: Default | Salesman: Sarah Milder

Billing Customer: Westwood Dynamic | Invoice Currency: South African Rand | Exchange Rate: 1

Tax Rate: 14 |  Suppress Line Detail on Print

ReferenceType	ReferenceNo
Serial No	14-9652365
Call Reference	CH0000505
Contract No	CO0000011
Location	
Project Reference	
Quote Reference	

ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchNumber	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCoPrice	TaxRate	Department	SuppressOnPrint	Status
Parts	147-98...	K147 Black toner	K147 Black toner	Man Warehouse		1.00	310.29	0.00	0.00	360.00	360.00	14.00	Sales Depart...	<input type="checkbox"/>	A
Expenses	TOLL	Marianhill Toll Fee...	Marianhill Toll Fee x 2			1.00	55.00	0.00	0.00	55.00	55.00	14.00	Sales Depart...	<input type="checkbox"/>	A
Select type...														<input type="checkbox"/>	

Comment: [Empty text box]

Sub Total: 415.00  
 VAT: 58.10  
 Grand Total: 473.10

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## SUPPRESS ON PRINT CHECKBOXES

- Only click on the check boxes of the items that you do not want visible on the printed Sales Invoice. This will not affect the

Sub/Grand Total but the selling prices that are visible will not match up with the invoice totals. This cannot be edited after the invoice has been printed.

Add new Customer Invoice - BPO: Version 2.1.0.43 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Delete Item | Save Layout | Print

Customer Name: Westwood Dynamic | Reference: | ReferenceType: | ReferenceNo: |  
 Contact Name: Jason March | Status: New | Serial No: 14-9652365 |  
 Commercial: Default | Date & Time: 20 Dec 2017 12:26:07 | Call Reference: CH0000505 |  
 Salesman: Sarah Milder | Billing Contact: Jason March | Contract No: CO0000011 |  
 Billing Customer: Westwood Dynamic | Exchange Rate: 1 | Location: |  
 Invoice Currency: South African Rand | Project Reference: |  
 Tax Rate: 14 | Quote Reference: |

ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchNumber	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCoPrice	TaxRate	Department	SuppressOnPrint	Status
Parts	147-88...	K147 Black toner	K147 Black toner	Main Warehouse		1.00	310.29	0.00	0.00	360.00	360.00	14.00	Sales Depart...	<input type="checkbox"/>	A
Expenses	TOLL	Marianhill Toll Fee...	Marianhill Toll Fee x 2			1.00	55.00	0.00	0.00	55.00	55.00	14.00	Sales Depart...	<input type="checkbox"/>	A
Select type...														<input type="checkbox"/>	

Comment: | Sub Total: 415.00 | VAT: 58.10 | Grand Total: 473.10

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## ADDITIONAL INVOICE ITEMS

- To add **extra items** to this invoice, click on the last text box in the last item row.
- Press the **Enter** key on your keyboard.

Add new Customer Invoice - BPO: Version 2.1.0.43 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Delete Item | Save Layout | Print

Customer Name: Westwood Dynamic | Reference: | Status: New | Date & Time: 20 Dec 2017 12:26:07

Contact Name: Jason March | Billing Customer: Westwood Dynamic | Invoice Currency: South African Rand | Tax Rate: 14

Commercial: Default | Salesman: Sarah Milder | Billing Contact: Jason March | Exchange Rate: 1

ReferenceType	ReferenceNo
Serial No	14-9652365
Call Reference	CH0000505
Contract No	CO0000011
Location	
Project Reference	
Quote Reference	

Item Type	Item Code	Item Description	Invoice Line Description	Warehouse Name	Batch Number	Quantity	Unit Cost	Markup	Discount	Unit Selling Price	Base Ccy Price	Tax Rate	Department	Suppress On Print	Status
Parts	147-88...	K147 Black toner	K147 Black toner	Main Warehouse		1.00	310.29	0.00	0.00	360.00	360.00	14.00	Sales Depa...	<input type="checkbox"/>	A
Expenses	TOLL	Marianhill Toll Fee...	Marianhill Toll Fee x 2			1.00	55.00	0.00	0.00	55.00	55.00	14.00	Sales Depa...	<input type="checkbox"/>	A
Select type...														<input type="checkbox"/>	

Comment:

Sub Total: 415.00  
VAT: 58.10  
Grand Total: 473.10

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This will bring up a **new** line.

- Click on the text box in this **new** row, under Invoice **Item Type**, to reveal a drop down arrow.
- Click on this arrow to bring up the **Item Type** menu.
- Select one of the following item types:
  - **SERV** (Internal Labour/Service)
  - **TRVL** (Travel)
  - **WARR** (Warranty)

### Remember:

- **Parts, Labour, Sub-Contracts** and **Expenses** must be logged against the call before invoicing. These items cannot be added to the invoice.
  - **Internal Services, Travel** and **Warranties** can be added to the invoice.
- In this image **Travel** has been selected.

Customer Name: Westwood Dynamic  
 Contact Name: Jason March  
 Commercial: Default  
 Salesman: Sarah Milder  
 Billing Customer: Westwood Dynamic  
 Invoice Currency: South African Rand  
 Tax Rate: 14

Reference: [Empty]  
 Status: New  
 Date & Time: 20 Dec 2017 12:26:07  
 Billing Contact: Jason March  
 Exchange Rate: 1

ReferenceType	ReferenceNo
Serial No	14-9652365
Call Reference	CH0000905
Contract No	CO0000011
Location	
Project Reference	
Quote Reference	

ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchNumber	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseQtyPrice	TaxRate	Department	SuppressOnPrint	Status
Parts	K147-00...	K147 Black toner	K147 Black toner	Main Warehouse		1.00	310.29	0.00	0.00	360.00	360.00	14.00	Sales Depa...	<input type="checkbox"/>	A
Expenses	TOLL	Marianhill Toll Fee...	Marianhill Toll Fee x 2			1.00	55.00	0.00	0.00	55.00	55.00	14.00	Sales Depa...	<input type="checkbox"/>	A

Sub Total	415.00
VAT	58.10
Grand Total	473.10

- Click on the invoice **Item Code** text box to reveal an **ellipsis** button.
- Click on this button to bring up the **Select a travel radius** menu.

- Note:** The *Select a [...]* screen displayed, will be according to the Item Type initially selected i.e. if **Warranty** had been initially selected then a *Select a warranty* screen would pop up.

Customer Name: Westwood Dynamic  
 Contact Name: Jason March  
 Commercial: Default  
 Salesman: Sarah Milder  
 Billing Customer: Westwood Dynamic  
 Invoice Currency: South African Rand  
 Tax Rate: 14

Reference: [Empty]  
 Status: New  
 Date & Time: 20 Dec 2017 12:26:07  
 Billing Contact: Jason March  
 Exchange Rate: 1

ReferenceType	ReferenceNo
Serial No	14-9652365
Call Reference	CH0000505
Contract No	CO0000011
Location	
Project Reference	
Quote Reference	

ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchNumber	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseQtyPrice	TaxRate	Department	SuppressOnPrint	Status
Parts	K147-88...	K147 Black toner	K147 Black toner	Man Warehouse		1.00	310.29	0.00	0.00	360.00	360.00	14.00	Sales Depa...	<input type="checkbox"/>	A
Expenses	TOLL	Marianhill Toll Fee...	Marianhill Toll Fee x 2			1.00	55.00	0.00	0.00	55.00	55.00	14.00	Sales Depa...	<input type="checkbox"/>	A
Travel						1.00	0.00	0.00	0.00	0.00	0.00	14.00		<input type="checkbox"/>	

fdMaxDet...	fdFee	fdCharge...
50	175.00	3.50
100	350.00	3.50
150	525.00	3.50
200	700.00	3.50

Sub Total: 415.00  
 VAT: 58.10  
 Grand Total: 473.10

- Click on the **row selector** in front of the **travel radius** you wish to **add** to this invoice.
- Click on **Ok**.



- The Invoice ***Item Description*** and Invoice ***Line Description*** fields will auto populate once you have selected the ***Item Code***.
  - **Note:** The **Warehouse Name** and **Batch/Serial Number** fields are not applicable as you have only been able to choose additional items which cannot be stored e.g. Internal Service, Travel or a Warranty.

Add new Customer Invoice - BPO; Version 2.1.0.43 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Delete Item | Save Layout | Print

Customer Name: Westwood Dynamic | Reference: | Status: New | Date & Time: 20 Dec 2017 12:26:07

Contact Name: Jason March | Billing Contact: Jason March

Commercial: Default | Invoice Currency: South African Rand | Exchange Rate: 1

Salesman: Sarah Milder | Tax Rate: 14

ReferenceType	ReferenceNo
Serial No	14-9652365
Call Reference	CH0000905
Contract No	CO0000011
Location	
Project Reference	
Quote Reference	

ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchNumber	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate	Department	SuppressOn
Parts	147-88...	K147 Black toner	K147 Black toner	Main Warehouse		1.00	310.29	0.00	0.00	360.00	360.00	14.00	Sales Depart...	
Expenses	TOLL	Maranhill Toll Fee x 2	Maranhill Toll Fee x 2			1.00	55.00	0.00	0.00	55.00	55.00	14.00	Sales Depart...	
Travel	50	Travel not exceeding 50 km	Travel not exceeding 50 km			1.00	0.00	0.00	0.00	175.00	175.00	14.00		

Comment:

Sub Total: 590.00  
VAT: 82.60  
Grand Total: 672.60

Open Windows | 18 Dec 2017

- Edit the **Quantity**, **Discount** and **Unit Selling Price** as required by clicking in each of their text boxes and either using the **directional arrows** or **typing** in the correct amounts.

Add new Customer Invoice - BPO; Version 2.1.0.43 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Delete Item | Save Layout | Print

Customer Name: Westwood Dynamic | Reference: | Status: New | Date & Time: 20 Dec 2017 12:26:07

Contact Name: Jason March | Billing Contact: Jason March

Commercial: Default | Invoice Currency: South African Rand | Tax Rate: 14

ReferenceType	ReferenceNo
Serial No	14-9652365
Call Reference	CH0000905
Contract No	CO0000011
Location	
Project Reference	
Quote Reference	

ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchNumber	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate	Department	SuppressOn
Parts	147-88...	K147 Black toner	K147 Black toner	Main Warehouse		1.00	310.29	0.00	0.00	360.00	360.00	14.00	Sales Depart...	<input type="checkbox"/>
Expenses	TOLL	Marianhill Toll Fee x 2	Marianhill Toll Fee x 2			1.00	55.00	0.00	0.00	55.00	55.00	14.00	Sales Depart...	<input type="checkbox"/>
Travel	50	Travel not exceeding 50 km	Travel not exceeding 50 km			1.00	0.00	0.00	0.00	175.00	175.00	14.00		<input type="checkbox"/>

Comment:

Sub Total: 590.00  
VAT: 82.60  
Grand Total: 672.60

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- If there is no **department** specified in the **Department** column, an **Error** message box will pop up asking;
  - **The department must be specified. Do you want to**

*correct the value?*

- Click on **Yes**.

- Click on the **Department** text box in the **row** you are adding.
- An **ellipsis** button will be revealed.

- Click on this *ellipsis* button to display the **Select a department for this item** pop up screen.

The screenshot shows the 'Add new Customer Invoice - BPO: Version 2.1.0.43 - Example Company' window. The main interface includes a menu bar (Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, Utilities) and a toolbar with buttons for Save, Back, Delete Item, Save Layout, and Print. The main area is divided into several sections: Customer Information (Customer Name: Westwood Dynamic, Contact Name: Jason March, Commercial: Default, Salesman: Sarah Milder, Billing Customer: Westwood Dynamic, Invoice Currency: South African Rand, Tax Rate: 14), Reference Information (Reference: New, Date & Time: 20 Dec 2017 12:26:07, Billing Contact: Jason March, Exchange Rate: 1), and a table of Related References. Below these is a table of invoice items with columns: ItemType, ItemCode, ItemDescription, InvoiceLineDescription, WarehouseName, BatchNumber, Quantity, UnitCost, Markup, Discount, UnitSellingPrice, BaseCcyPrice, TaxRate, Department, and SuppressOn. The items listed are: Parts (K147 Black toner), Expenses (Marianhill Toll Fee x 2), and Travel (Travel not exceeding 50 km). A pop-up window titled 'Select a department for this item' is overlaid on the bottom right, showing a table with columns: DEPTDepartment, DEPTDepartmentDescription, and Status. The table lists 'Sales' (Sales Department, Status A) and 'Tech' (Technical, Status A). The pop-up also has an 'Ok' button with a checkmark, a 'Back' button, and a 'Save Layout' button. At the bottom of the main window, there is a 'Comment' field and a summary of totals: 590.00, 82.60, and 672.60. The date '18 Dec 2017' is shown in the bottom right corner.

- Click on the **row selector** in front of the **department** you wish to **assign** to this item.

- Click on **Ok**.

- Continue **adding items** in this manner using the process outlined above until you have all the invoice items required.
- Ensure that all items have the **correct** selling price.

## ADDITIONAL INVOICE ITEMS

- Drag and drop rows to set the order you wish the items to be displayed on the sales invoice. This order will directly be pulled into the printed invoice when generated.

The screenshot shows the 'Edit Customer Invoice' window for invoice number JHV0000532. The interface includes a top menu bar, a toolbar with 'Save', 'Back', 'Delete Item', and 'Save Layout' buttons, and a main workspace. The workspace is divided into several sections: customer and contact information, reference and date/time, billing and shipping addresses, and a main table of invoice items. A blue arrow points to the 'Warranty' row in the table, indicating a drag-and-drop action. The bottom right corner shows a summary table with 'Sub Total', 'VAT', and 'Grand Total' values.

SuppressOnPrint	Item Type	Item Code	Item Description	Invoice Line Description	Warehouse Name	Batch/Serial No	Quantity	Unit Cost	Markup	Discount	Unit Selling Price	Base Coy Price	Tax Rate	Department	Status
<input type="checkbox"/>	Parts	CHA001	Chair	Chair	Main Warehouse		1.000	0.000	0.000	0.000	879.950	879.950	15.000	Sales Depart...	A
<input type="checkbox"/>	Parts	500-147K	SP500 Black Ton...	SP500 Black Toner	Main Warehouse		1.000	0.000	0.000	0.000	540.000	540.000	15.000	Sales Depart...	A
<input type="checkbox"/>	Internal Service	DEL	Delivery Fee	Delivery Fee			1.000	0.000	0.000	10.000	960.000	960.000	15.000	Sales Depart...	A
<input type="checkbox"/>	Warranty	1YSW	1 Year Supplier	1 Year Supplier Warra...			1.000	0.000	0.000	0.000	250.000	250.000	15.000	Sales Depart...	A
<input type="checkbox"/>	Select type...														

<b>Sub Total</b>	2,533.95
<b>VAT</b>	380.09
<b>Grand Total</b>	2,914.04

## SAVE INVOICE

- When you have finished adding items, click on **Save**.

Edit Customer Invoice - INV0000377 - BPO: Version 2.1.0.43 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Delete Item | Save Layout | Print

Customer Name: Westwood Dynamic | Reference: Additional Items for Service | ReferenceType: Serial No | ReferenceNo: 14-9652365

Contact Name: Jason March | Status: New | Call Reference: CH0000505

Commercial: Default | Date & Time: 20 Dec 2017 12:26:05 | Contract No: C00000011

Salesman: Sarah Milder | Billing Contact: Jason March | Location: | Project Reference: | Quote Reference: |

Billing Customer: Westwood Dynamic | Exchange Rate: 1 | Tax Rate: 14 |  Suppress Line Detail on Print

Item Type	Item Code	Item Description	Invoice Line Description	Warehouse Name	Batch Number	Quantity	Unit Cost	Markup	Discount	Unit Selling Price	Base Cost Price	Tax Rate	Department	Suppress or Print	Status
Parts	147-88...	K147 Black toner	K147 Black toner	Main Warehouse		1.00	310.29	0.00	0.00	360.00	360.00	14.00	Sales Dep...	<input type="checkbox"/>	A
Travel	50	Travel not exceed...	Travel not exceedin...			1.00	0.00	0.00	0.00	175.00	175.00	14.00	Sales Dep...	<input type="checkbox"/>	A
Expenses	TOLL	Toll	Marianhill Toll Fee x 2			1.00	55.00	0.00	0.00	55.00	55.00	14.00	Sales Dep...	<input type="checkbox"/>	A

Comment:

Sub Total: 590.00  
VAT: 82.60  
Grand Total: 672.60

Open Windows | 18 Dec 2017

You will return to the **Sales Invoices for Call [ ]** screen where you can view the newly raised **invoice**.

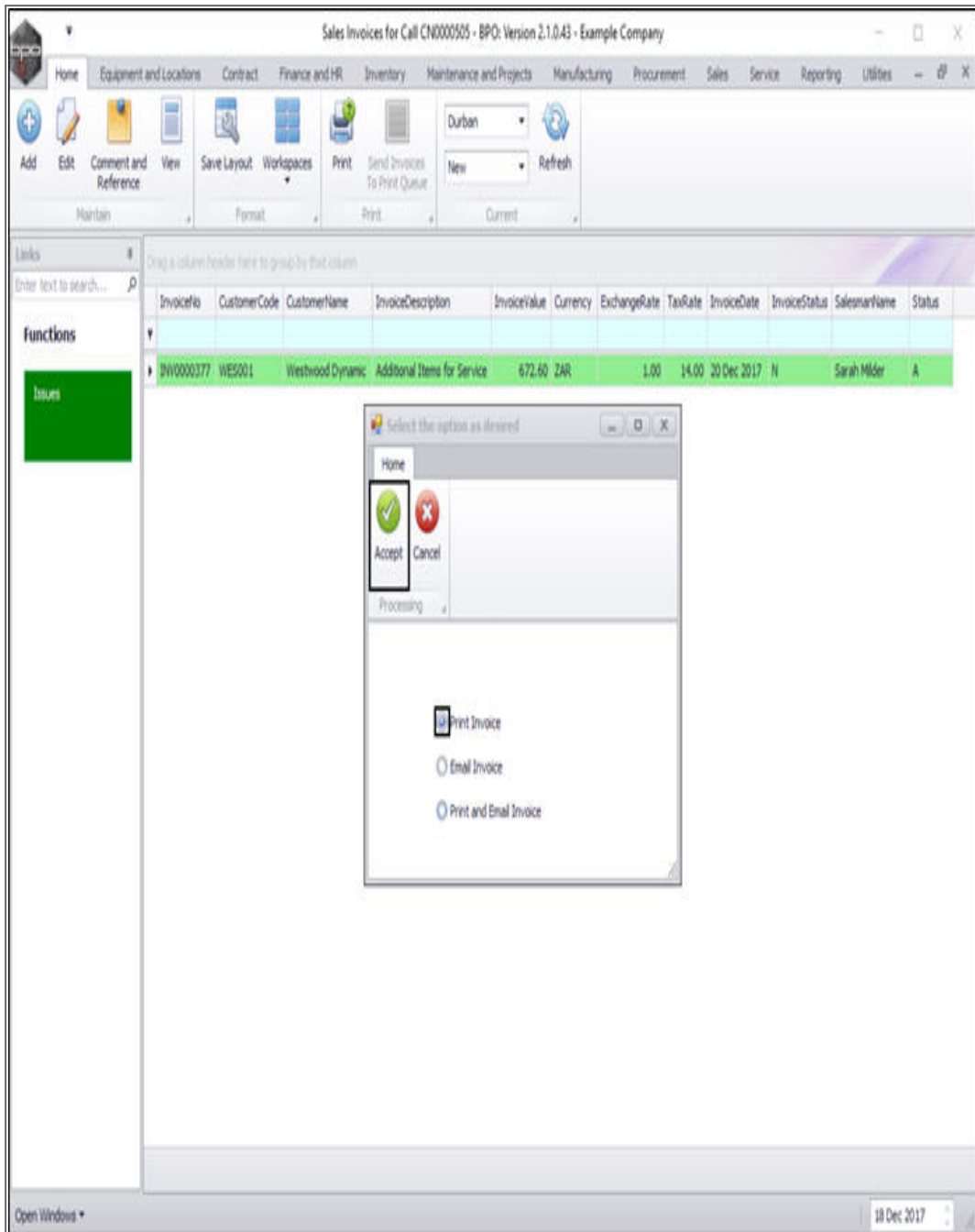


## PRINT INVOICE

- Click on the **row selector** in front of the **new invoice** that you wish to **print**.
- Click on **Print**.

InvoiceNo	CustomerCode	CustomerName	InvoiceDescription	InvoiceValue	Currency	ExchangeRate	TaxRate	InvoiceDate	InvoiceStatus	SalesmanName	Status
INV0000377	WES001	Westwood Dynamic	Additional Items for Service	672.60	ZAR	1.00	14.00	20 Dec 2017	N	Sarah Milder	A

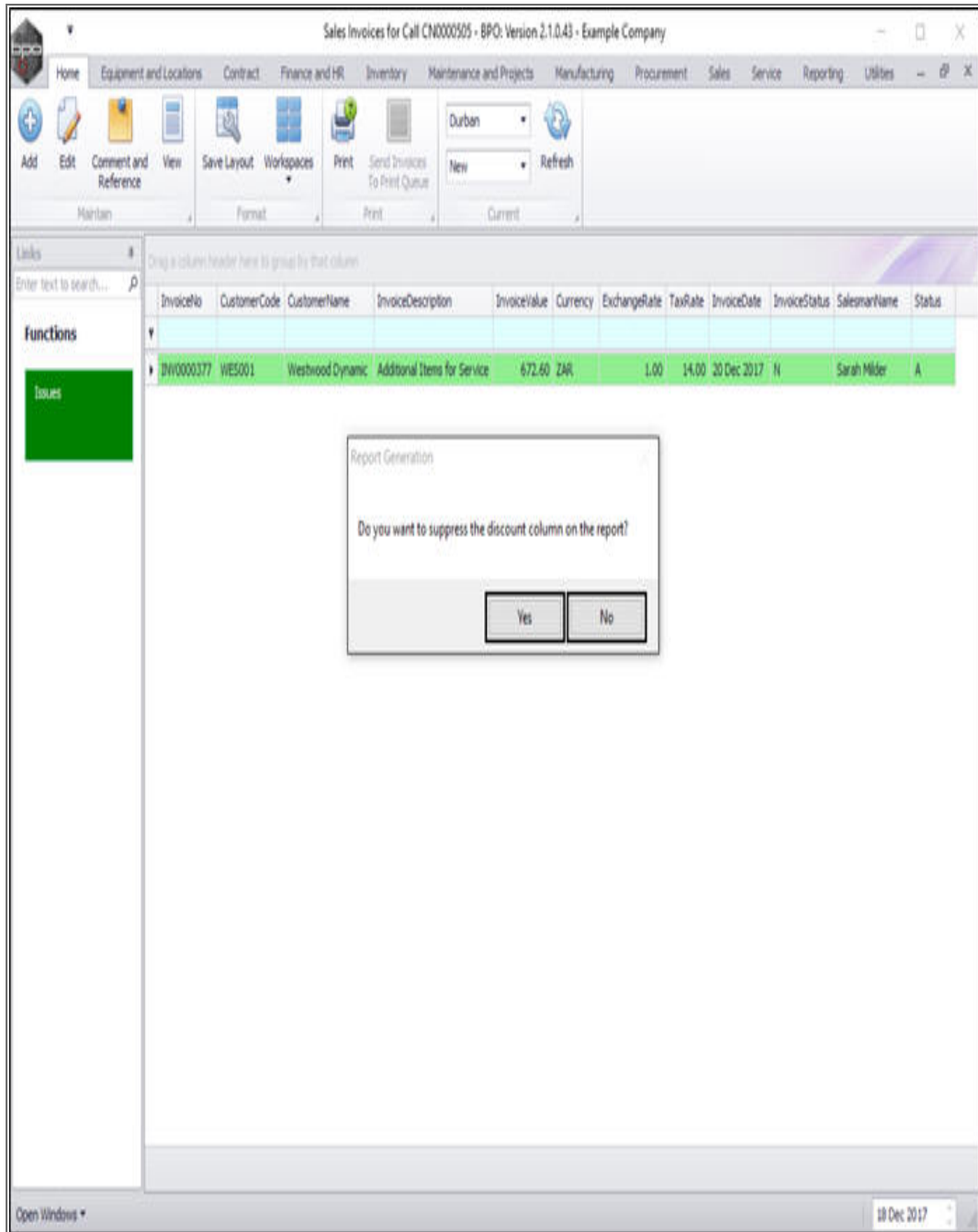
- A **Select the option as desired** screen will pop up.
- Click on **Print Invoice**.
- Click on **Accept**.



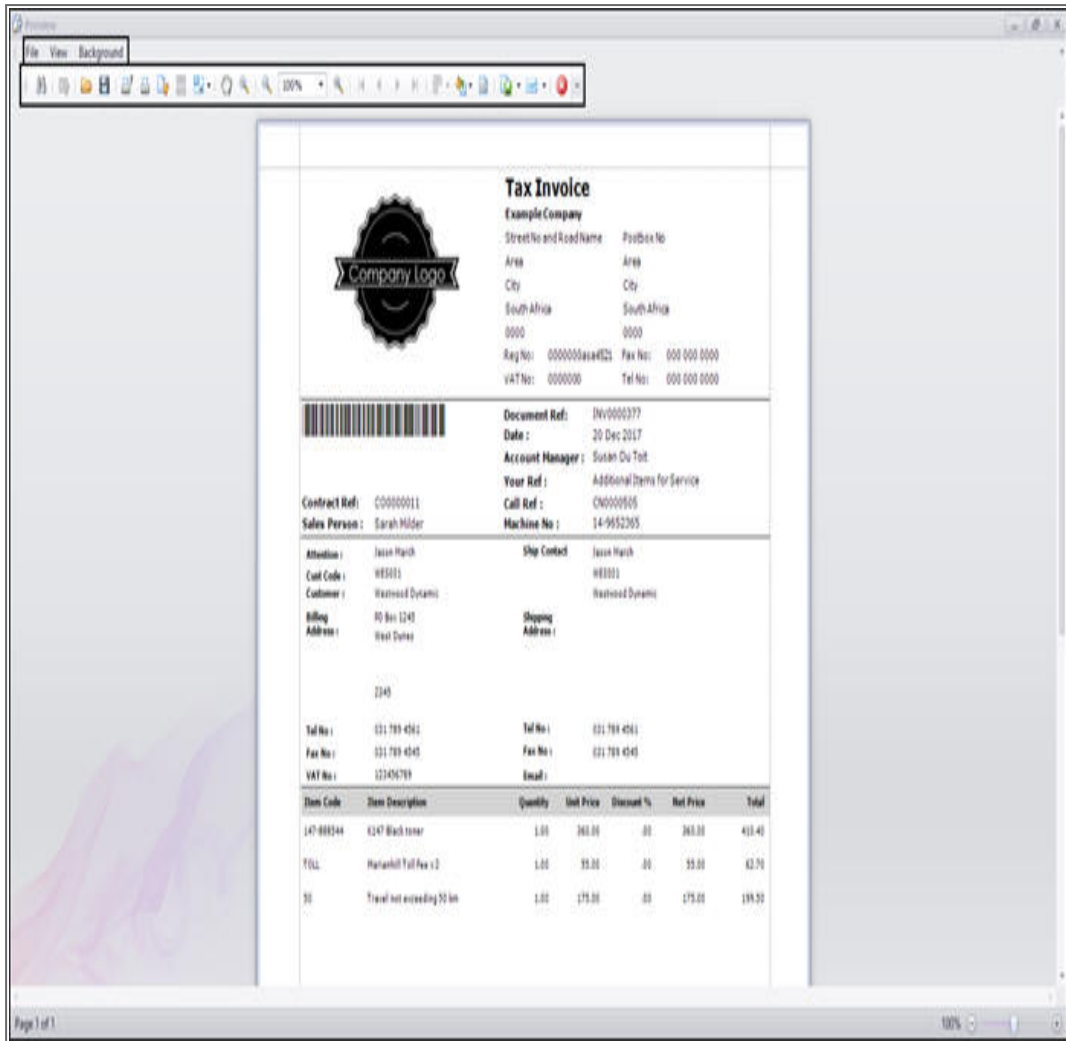
## **SUPPRESS THE DISCOUNT COLUMN ON THE REPORT**

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- A *Report Generation* message box will pop up, asking;
  - *Do you want to suppress the discount column on the report?*
    - Select **Yes** to hide the discount on the printed invoice.
    - Select **No** to show the discount on the printed invoice.

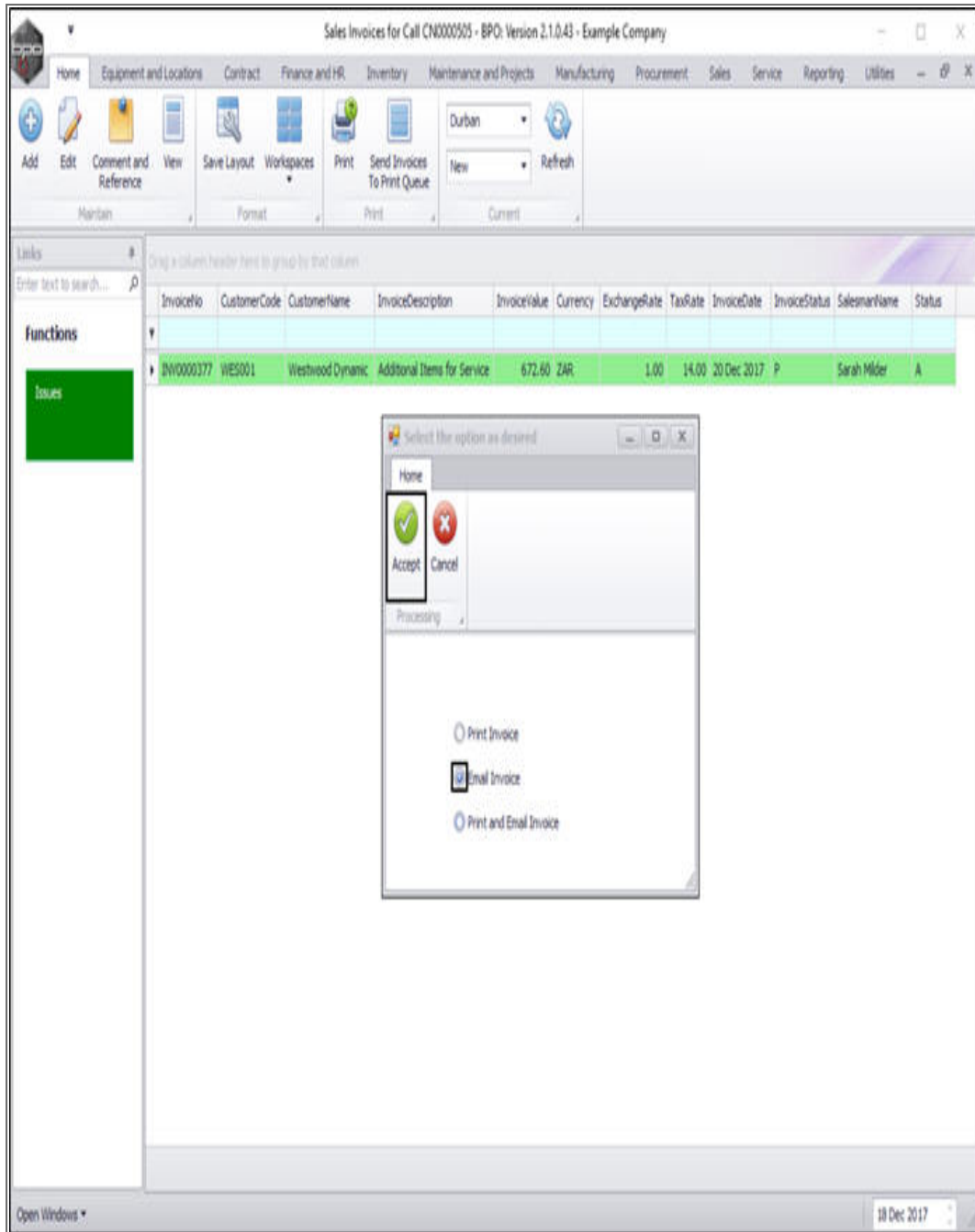


- The **Report Preview** screen will be displayed.
- From here you can **View, Print, Export** or **Email** the Invoice.
- **Close** the Report Preview screen when done.



## EMAIL INVOICE

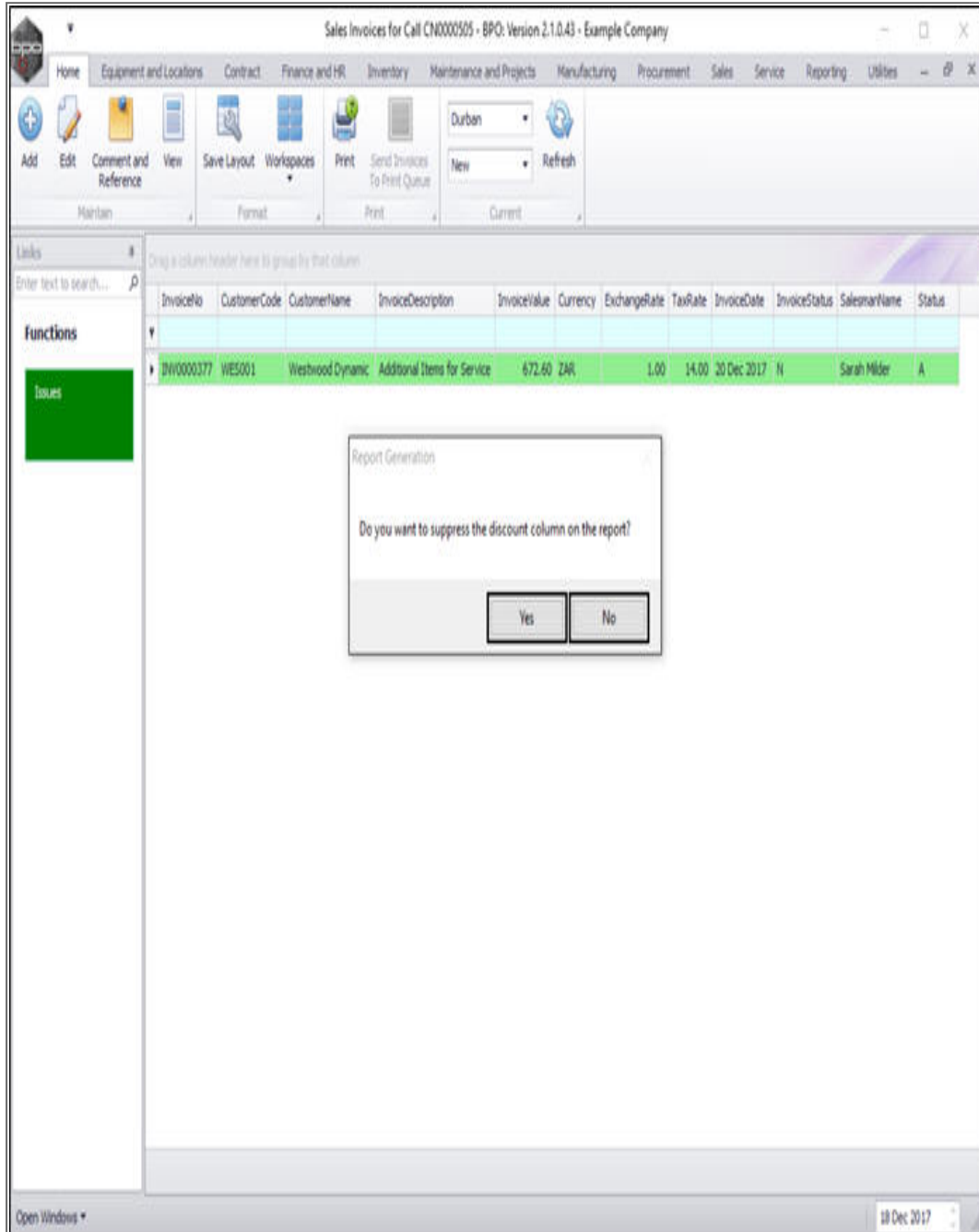
- In the *Select the option as desired* screen,
- Click on *Email Invoice*.
- Click on *Accept*.



## SUPPRESS THE DISCOUNT COLUMN ON THE REPORT

- A *Report Generation* message box will pop up, asking;
  - *Do you want to suppress the discount column on the report?*

- Select **Yes** to hide the discount on the printed invoice.
- Select **No** to show the discount on the printed invoice.



The ***Email Sales Invoice [ ]*** screen will be displayed.

- **Employee:** Will be populated by the employee linked to the associated login. Click on the drop down arrow and select an alternative employee from the menu if required.
- **From:** The selected employee's email address will pull through here. If not populated, you can manually type in the email address.
- **To:** This will automatically populate with the sales invoice contact person's email address. Click on the search button to link more contacts from this customer. You also have the ability to manually type in an email address. This message will be sent from the server, so if you want to have email history for this, then add your email address here.
- **Attachments:** The sales invoice PDF will be attached to the email. If there are outstanding parts that have not been issued, a Back Order report will also be attached. You can link additional attachments by clicking on the search button and using the Select File screen to select a file to attach.
- **Subject:** Type in an email subject.
- **Message:** Type in an email message.



Employee: Sarah Milder

From: \_\_\_\_\_

To: \_\_\_\_\_

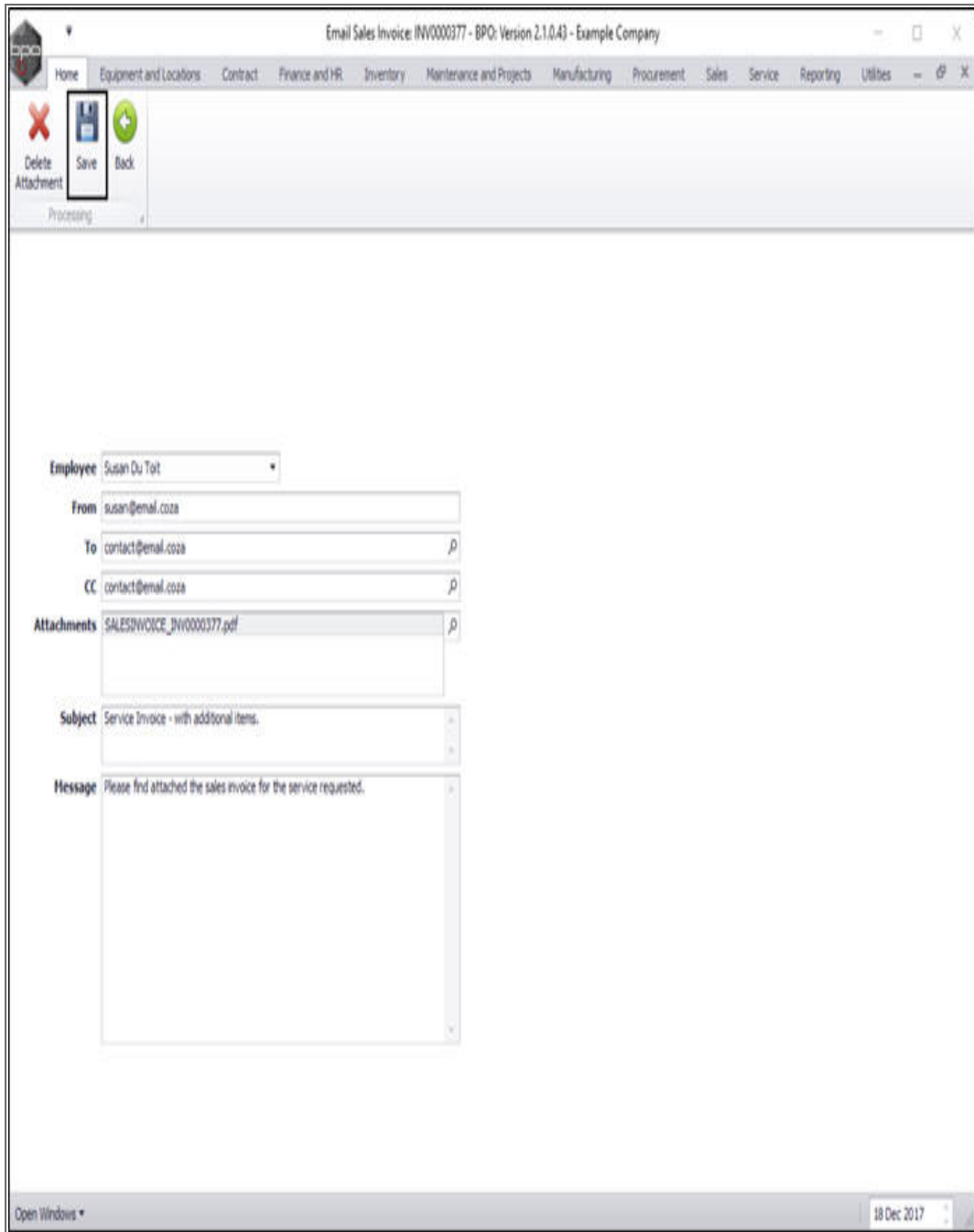
CC: \_\_\_\_\_

Attachments: SALESINVOICE\_INV0000377.pdf

Subject: \_\_\_\_\_

Message: \_\_\_\_\_

- When you have finished adding details to the Email Sales Invoice page, click on **Save**.



- Your email will be sent from the server and you will return to the **Call Listing** screen.

MNU.122.011