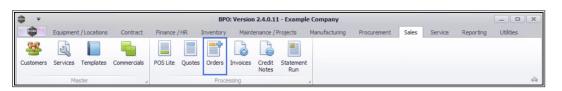


# **SALES**

# **ORDERS - PRINT / EMAIL SALES ORDER**

When using the **Email** option to send a Sales Order, please note that it will be mailed via the BPO Email Service on the server and not from your own MS Outlook.

#### Ribbon Access: Sales > Orders



- 1. The *Sales Orders* listing screen will be displayed.
- 2. Select the *Site* where the Sales Order is located.
  - The example has *Durban* selected.
- 3. Select the *Status*.
  - The image has *New Order* selected.
- 4. Select the *row* of the Sales Order that you wish to *print*.
- 5. Click on *Print Sales Order*.



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A	dd Edit	Delete View	Forward Creat		Items New Deal WO Project	Save Layout	Vorkspaces	Print Sales Order	Print Proforma Invoice	Export New	order			
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	OrderNo		CustomerName	OrderStatusDesc	OrderDescription	OrderValue		OrderDate	SalesmanName	ExchangeRate		OrderTime	DeptCode	
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н	OR0000207	NET001	Networking and Lapto		test	564.30		03/08/2017	Bianca Du Toit	1.00		01:10:42		
н	OR0000218	TIN001	Tinas Coffee Shop	New order	test	24,071.10		14/08/2017	Bianca Du Toit	1.00		11:18:17		
н	OR0000220	BET0001	Betties Summer Shop		1234	23,029.07		21/08/2017	Bianca Du Toit	1.00		11:49:29		
н	OR0000221	HOP001	Hope Works (Pty) Ltd	New order		4,745.59		04/09/2017	Bianca Du Toit	1.00		14:49:36		
4	OR0000222	SAM001	Samanthas Diner	New order	test	402.85		04/09/2017	Bianca Du Toit	10.00		02:50:18		
Ľ	OR0000244	HOP001	Hope Works (Pty) Ltd	New order	test	993.60	ZAR	09/04/2018	Bianca Du Toit	1.00	15.00	10:18:06		
	OR0000251	HOP001	Hope Works (Pty) Ltd	New order	test	575.00	ZAR	23/04/2018	Bianca Du Toit	1.00	15.00	02:58:26		
	OR0000257	DER001	Derton / Technologies	New order		6,119.52	ZAR	21/05/2018	Bianca Du Toit	1.00	14.00	14:16:30		
	OR0000281	TIA001	Titan Group	New order	Copy of test	920.00	ZAR	09/01/2019	Bianca Du Toit	1.00	15.00	16:47:51		
	OR0000282	HOP001	Hope Works (Pty) Ltd	New order	1234	920.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:48:13		
	OR0000283	HOP001	Hope Works (Pty) Ltd	New order	test	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:50:21		
	OR0000284	HOP001	Hope Works (Pty) Ltd	New order	1234	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:51:52		
	OR0000285	BEA001	Bearing and Shoe	New order	TestQuoteStatus	1,104.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:58:22		
	OR0000286	BEA001	Bearing and Shoe	New order	quotereftest	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:59:34		
	OR0000287	APP0001	Apple Juice Inc	New order	8745	993.60	ZAR	09/01/2019	Bianca Surend	1.00	15.00	05:06:46		
	OR0000297	NEW 101	New Customer Test	New order	test	150.00	ZAR	17/09/2019	Bianca Du Toit	1.00	15.00	10:46:59		
	OR0000300	HOP001	Hope Works (Pty) Ltd	New order	test	241,500.00	ZAR	07/04/2020	Kame Pillay	1.00	15.00	12:31:21		
	OR0000303	PIN0001	Pink Shoes	New order	Test email	241,895.60	ZAR	09/04/2020	Kame Pillay	1.00	15.00	16:35:25		
	OR0000304	OFF001	Office Supplies Unlimit	New order	test 1	12,333.75	ZAR	14/04/2020	Sne Ndwalane	1.00	15.00	10:27:06		
	OR0000305	PAN001	Panda Copiers	New order	Test	854.00	USD	14/04/2020	Kame Pillay	10.00	0.00	11:59:51		

- The Select the option as desired screen will display with the following options;
  - Print Order (will open the Order in Report Preview to view, print, export or email)
  - Email Order (can attach documents, add recipients, the

system will create a .pdf and email the Order)

• Print and Email Order (both the Report Preview and

Email screens will pop up)

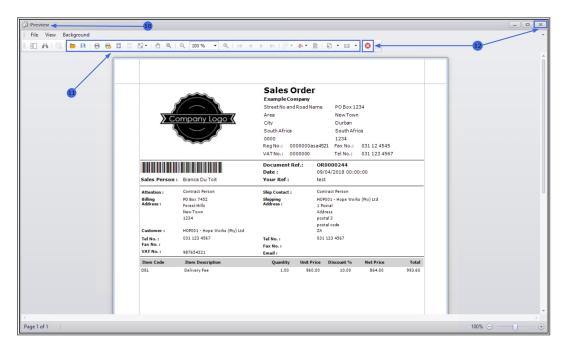
#### **PRINT SALES ORDER**

- 7. Click on the *Print Order* radio button.
- 8. Click on *Accept*.



6	Hom	e Equipment	/Locations Contract	Finance / HR		ance / Projects	Manuta	cturing Pro	curement Sale		Reporting	Utilities	- 8	)
						ESS						GV		
A	dd Edit	Delete View	Forward Creat		WO Project	Save Layout	Norkspaces	Print Sales Order	Print Proforma Invoice	Export Ne	v order	<ul> <li>Refresh</li> </ul>		
	Main	tain	" Navigati "	Process		Forma	t	4	Print	4	Currer	nt		-
								6						
	OrderNo		CustomerName	OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TayRate	OrderTime	DeptCode	
	REC	REC CODE	ADC	*Dc	RDc		Currency					R	RDC	
	OR0000207	NET001	Networking and Lapto	-	test	564.30	740	03/08/2017	Bianca Du Toit	1.0	14.00	01:10:42		
	OR0000218	TIN001	Tinas Coffee Shop	New order	test	24.071.10		14/08/2017	Bianca Du Toit	1.0		11:18:17		
	OR0000220	BET0001	Betties Summer Shop		1234	23.029.07		21/08/2017	Bianca Du Toit	1.0		11:49:29		
	OR0000221	HOP001	Hope Works (Pty) Ltd	New order	Select the op	tion as desired	d	_		1.0		14:49:36		
	OR0000222	SAM001	Samanthas Diner	New order	Home				t	10.0	0.00	02:50:18		
•	OR0000244	HOP001	Hope Works (Pty) Ltd	New order					it	1.0	15.00	10:18:06		
	OR0000251	HOP001	Hope Works (Pty) Ltd	New order	S 20 1				it	1.0	15.00	02:58:26		
	OR0000257	DER001	Derton / Technologies	New order	Accept Cancel				it	1.0	14.00	14:16:30		
	OR0000281	TIA001	Titan Group	New order	Pocessing		8		⇔ it	1.0	15.00	16:47:51		
	OR0000282	HOP001	Hope Works (Pty) Ltd	New order	Fricessing a	/	~		d	1.0	15.00	04:48:13		
	OR0000283	HOP001	Hope Works (Pty) Ltd	New order					d	1.0	15.00	04:50:21		
	OR0000284	HOP001	Hope Works (Pty) Ltd	New order		×			d	1.0	15.00	04:51:52		
	OR0000285	BEA001	Bearing and Shoe	New order	9 0	Print Order			d	1.0	15.00	04:58:22		
	OR0000286	BEA001	Bearing and Shoe	New order	0	Email Order		7	d	1.0	15.00	04:59:34		
	OR0000287	APP0001	Apple Juice Inc	New order	Ĭ				d	1.0	15.00	05:06:46		
	OR0000297	NEW 101	New Customer Test	New order	0	Print and Email (	Order		it	1.0	15.00	10:46:59		
	OR0000300	HOP001	Hope Works (Pty) Ltd	New order						1.0	15.00	12:31:21		
	OR0000303	PIN0001	Pink Shoes	New order						1.0	15.00	16:35:25		
	OR0000304	OFF001	Office Supplies Unlimit	New order	test 1	12,333.75	ZAR	14/04/2020	Sne Ndwalane	1.0	15.00	10:27:06		
	OR0000305	PAN001	Panda Copiers	New order	Test	854.00	USD	14/04/2020	Kame Pillay	10.0	0.00	11:59:51		

- 10. The *Report Preview* screen will display.
- You can make cosmetic changes to your document as well as *Save*,
   *Print*, *Add a Watermark*, *Export* or *Email* the Sales Order.
- 12. Close the Report Preview screen when done.





You will return to the *Sales Orders* listing screen.

# EMAIL INVOICE / PRINT AND EMAIL SALES ORDER

 $\times$  If you get an *error* when trying to email the document, 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.

- From the Select the option as desired screen, select Email Order or Print and Email Order.
  - The example has *Email Order* selected.

	Hom	ne Equipment	/Locations Contra	ct Finance / HR	Inventory Mai	intenance / Proje	cts Ma	nufacturing	Procurement		Service	Reporti	ng Utilitie	es –	· 6 )
6	Ð 💋	×			€ 🔒	23		<b>P</b>	e se		Durban	•	· 2		
A	dd Edit	Delete View	Forward Cre		d Items New Deal	Save Layout	Vorkspaces	Print Sales Order	Print Proforma Invoice	Export	New order	•	Refresh		
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	OrderNo		CustomerName	OrderStatusDesc		OrderValue		OrderDate	SalesmanName	-	Rate TaxR		OrderTime	DeptCode	DeptNam
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	OR0000207	NET001	Networking and Lapto	New order	test	564.30	ZAR	03/08/2017	Bianca Du Toit		1.00 1	4.00 0	1:10:42		
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	OR0000221	HOP001	Hope Works (Pty) Ltd	New	~	<hr/>			Bianca Du Toit		1.00	14.00	4:49:36		
	OR0000222	SAM001	Samanthas Diner	New 🥑 🛛	8				Bianca Du Toit	1	10.00	0.00 0	2:50:18		
۲	OR0000244	HOP001	Hope Works (Pty) Ltd	New Accept C	ancel				Bianca Du Toit		1.00 1	15.00 1	0:18:06		
	OR0000251	HOP001	Hope Works (Pty) Ltd	New			1		Bianca Du Toit		1.00	15.00 0	2:58:26		
	OR0000257	DER001	Derton / Technologies	New Cocessir	g 4			~	Bianca Du Toit		1.00 1	14.00	4:16:30		
	OR0000281	TIA001	Titan Group	New		1			Bianca Du Toit		1.00 1	15.00 1	6:47:51		
	OR0000282	HOP001	Hope Works (Pty) Ltd	New		1			Bianca Surend		1.00 1	15.00 0	4:48:13		
	OR0000283	HOP001	Hope Works (Pty) Ltd	New	O Print Order	1			Bianca Surend		1.00	15.00 0	4:50:21		
	OR0000284	HOP001	Hope Works (Pty) Ltd	New		<b>_</b>			Bianca Surend		1.00 1	15.00 0	4:51:52		
	OR0000285	BEA001	Bearing and Shoe	New	Email Order	V			Bianca Surend		1.00	15.00 0	4:58:22		
	OR0000286	BEA001	Bearing and Shoe	New	Print and Email	Order			Bianca Surend		1.00 1	15.00 0	4:59:34		
	OR0000287	APP0001	Apple Juice Inc	New					Bianca Surend		1.00	15.00 0	5:06:46		
	OR0000297	NEW 101	New Customer Test	New					Bianca Du Toit		1.00 1	15.00 1	0:46:59		
	OR0000300	HOP001	Hope Works (Pty) Ltd	New order	test	241,500.00	ZAR	07/04/2020	Kame Pillay		1.00	15.00 1	2:31:21		
	OR0000303	PIN0001	Pink Shoes	New order	Test email	241,895.60	ZAR	09/04/2020	Kame Pillay		1.00 1	15.00 1	6:35:25		
	OR0000304	OFF001	Office Supplies Unlimit	New order	test 1	12,333.75	ZAR	14/04/2020	Sne Ndwalane		1.00 1	15.00 1	0:27:06		
	OR0000305	PAN001	Panda Copiers	New order	Test	854.00	USD	14/04/2020	Kame Pillay	1	10.00	0.00 1	1:59:51		
	OR0000308	TIA001	Titan Group	New order	MRTEst	885.50	ZAR	22/04/2020	Marc Repsold		1.00 1	15.00 1	2:38:44		
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f	en Windows 🔻												on : 2.4.0.11	1	

2. Click on *Accept*.

3. The *Email Sales Order: OR[order number]* screen will display, for both Email Invoice or Print and Email Invoice options.



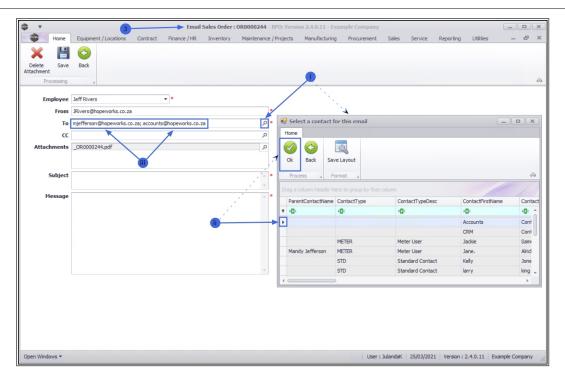
### **Email Header Information**

- **Employee:** The employee who is currently logged onto the system, will display in the employee field. Click on the drop-down **arrow** to choose an alternative employee name, if required.
- From: The email address for the employee, selected above in the employee field above, will display. This field can be edited if so required.

### Searching for and Adding a second email address

- **To:** This field will auto populate with the email address of the contact person at the customer. To choose an alternative email or to add a second 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 contact you wish to add and click on *OK*.
  - iii. To add an additional contact person, click on the *search* button to select and add the contact to the email. The second email address will be separated with a [;], e.g. *mjefferson@hopeworks.co.za; accounts@hopeworks.co.za*.
- **CC:** If a group email address has been set up on the order or accounts contact, then the group email address will display here.





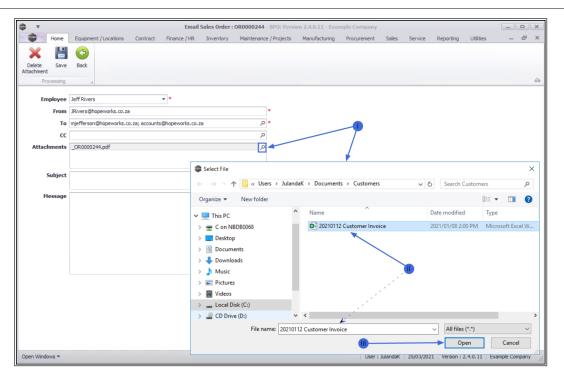
### **Email Attachments**

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

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

- To add additional documents to be emailed, click on the search button in the Attachments field to display the Select File screen.
- ii. *Browse* to find the file location then click on the file you wish to attach.
- iii. Once you have selected the file, click on Open.





The attachment will display in the *Attachments* field.

## **Delete an Attachment**

You may choose to remove an attached document.

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



ф т			Email	Sales Order	: OR0000244 - BPO: Versi	on 2.4.0.11 - Exa	nple Company						
Home	Equipment / Locations	Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	-	₽ X
Delete Attachment	Back												\$
Employee	Jeff Rivers		•										
From	JRivers@hopeworks.co.za	3			•								
То	mjefferson@hopeworks.c	o.za; accounts	@hopeworks.co.;	a	* م								
CC					م								
Attachments	OR0000244.pdf 20210112 Customer Invoi	ce.xlsx			<b>∧</b>		1						
Subject					*								
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Open Windows 🕶							User :	JulandaK	25/03/202	1 Version : 2	2.4.0.11 E	xample Con	pany //

## Email Subject and Message

1. **Subject**: Click in the text box to type a subject line for the email.

Remember that this is the first reference to the email, that your Customer will see.

- 2. Message: Click in the text box to type the email text message.
- 3. Once you have finished entering the relevant information, click on *Save*.



ф т			Email	Sales Order :	OR0000244 - BPO: Versi	on 2.4.0.11 - Exam	nple Company						x
Home	Equipment / Locations	Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting L	Itilities	- 6	×
Delete Attachment	George Back												
Processing	3												$\diamond$
Employee	Jeff Rivers		<b>*</b> *										
	JRivers@hopeworks.co.za												
	mjefferson@hopeworks.co				* 0								
	accounts@hopeworks.co.;				م								
	_OR0000244.pdf				2								
Subject	Ref: PO: HW250 - Order	for Toner Kit			÷		-1						
Message	Dear Mandy,				*								
	Attached please find your	Sales Order f	or the 2 x Toner K	ts you have pla	ced.								
	Delivery will be made withi	n 3 working d	ays.										
	Please note our Terms and	d Conditions fo	or Returns.				_2						
	Kind Regards												
	Jeff Rivers				~								
Open Windows 🕶							User :	JulandaK	25/03/2021	Version : 2.4.	0.11 E	ample Compa	ny //

You will return to the *Sales Orders* listing screen.

#### **Related Topics**

- Add a Sales Order
- Print Pro-Forma Invoice
- Create Sales Invoice from Sales Order
- <u>Create New Deal Sale / Rental (creates a call)</u>
- <u>Create New Deal Project Sale / Rental</u>

MNU.126.003