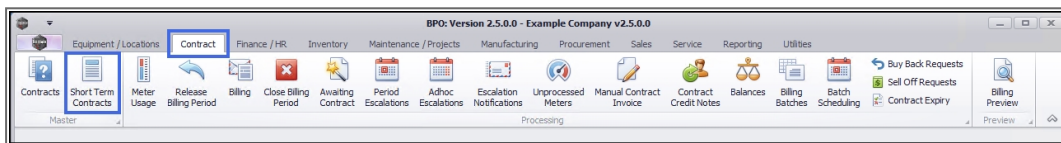


CONTRACTS

SHORT TERM CONTRACT - PRINT DEPOSIT AND FINAL INVOICE

Ribbon Access: Contract > Short Term Contracts

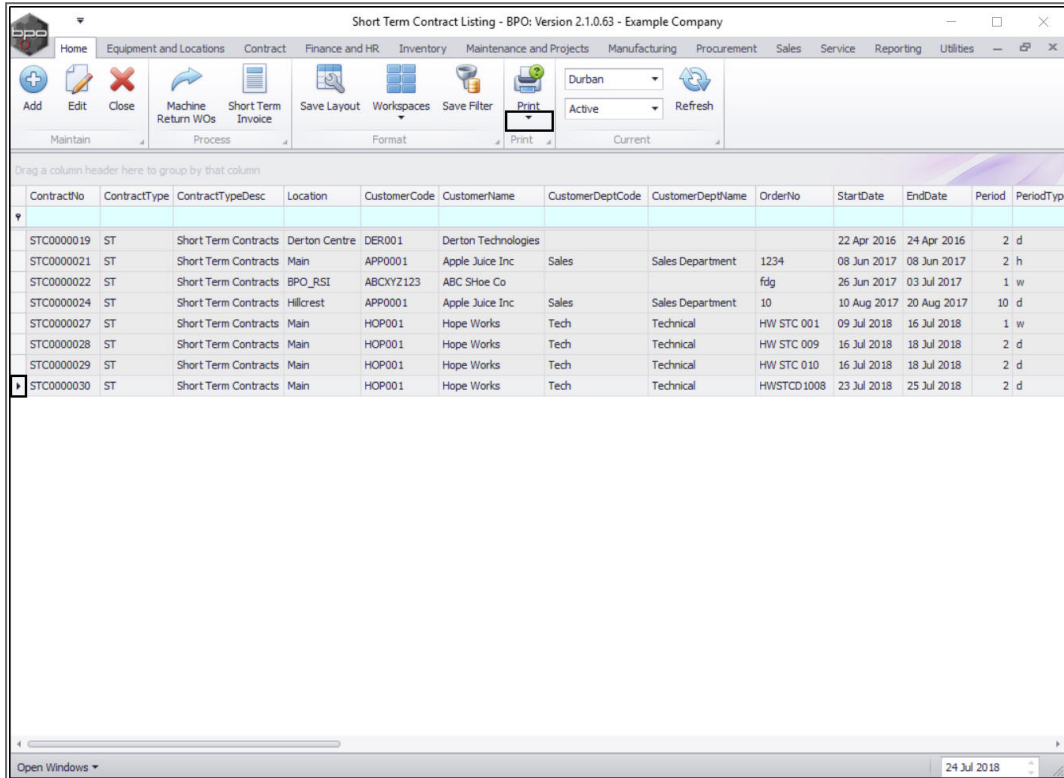


- The **Short Term Contract Listing** screen will be displayed.
- Ensure that you have selected the correct **site** and that the **status** is set to **Active**.

ContractNo	ContractType	ContractTypeDesc	Location	CustomerCode	CustomerName	CustomerDeptCode	CustomerDeptName	OrderNo	StartDate	EndDate	Period	PeriodType
STC0000019	ST	Short Term Contracts	Derton Centre	DER001	Derton Technologies				22 Apr 2016	24 Apr 2016	2 d	
STC0000021	ST	Short Term Contracts	Main	APP0001	Apple Juice Inc	Sales	Sales Department	1234	08 Jun 2017	08 Jun 2017	2 h	
STC0000022	ST	Short Term Contracts	BPO_RSI	ABCXYZ123	ABC Shoe Co			fdg	26 Jun 2017	03 Jul 2017	1 w	
STC0000024	ST	Short Term Contracts	Hillcrest	APP0001	Apple Juice Inc	Sales	Sales Department	10	10 Aug 2017	20 Aug 2017	10 d	
STC0000027	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 001	09 Jul 2018	16 Jul 2018	1 w	
STC0000028	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 009	16 Jul 2018	18 Jul 2018	2 d	
STC0000029	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 010	16 Jul 2018	18 Jul 2018	2 d	

PRINT SHORT TERM CONTRACT DEPOSIT INVOICE

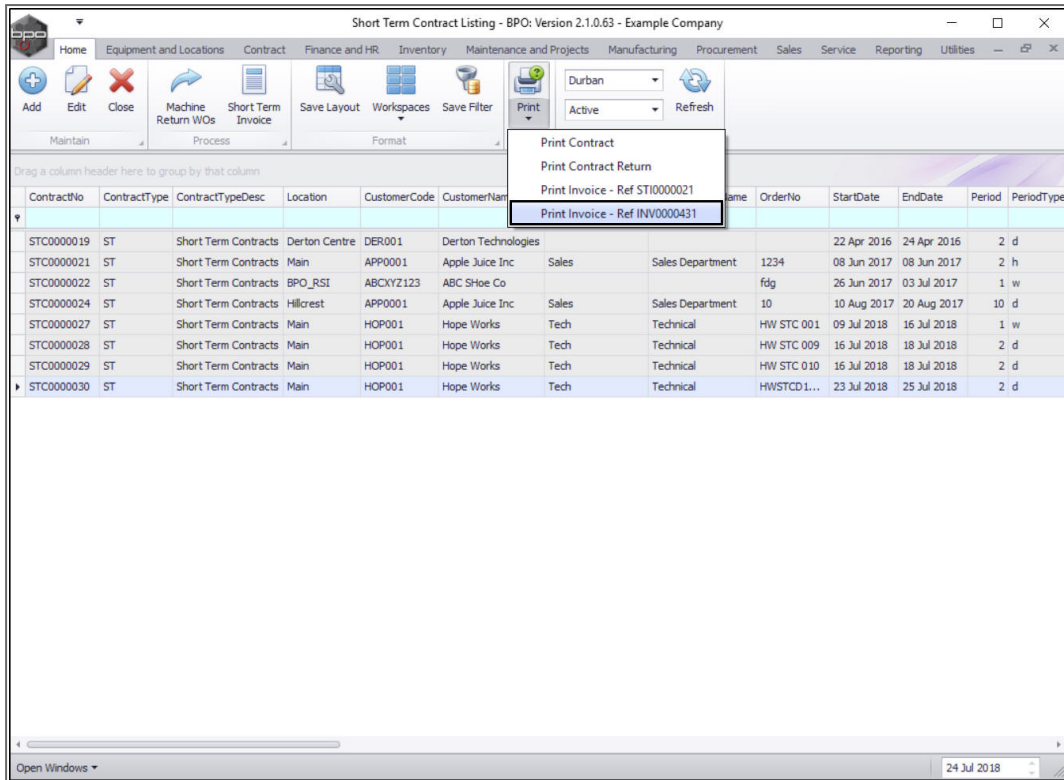
- Select the **row** of the **short term contract** where you wish to **print** the deposit invoice.
- Click on the drop-down **arrow** on the **Print** button.



ContractNo	ContractType	ContractTypeDesc	Location	CustomerCode	CustomerName	CustomerDeptCode	CustomerDeptName	OrderNo	StartDate	EndDate	Period	PeriodType
STC0000019	ST	Short Term Contracts	Derton Centre	DER001	Derton Technologies				22 Apr 2016	24 Apr 2016	2 d	
STC0000021	ST	Short Term Contracts	Main	APP0001	Apple Juice Inc	Sales	Sales Department	1234	08 Jun 2017	08 Jun 2017	2 h	
STC0000022	ST	Short Term Contracts	BPO_RSI	ABCXYZ123	ABC Shoe Co			fdg	26 Jun 2017	03 Jul 2017	1 w	
STC0000024	ST	Short Term Contracts	Hillcrest	APP0001	Apple Juice Inc	Sales	Sales Department	10	10 Aug 2017	20 Aug 2017	10 d	
STC0000027	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 001	09 Jul 2018	16 Jul 2018	1 w	
STC0000028	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 009	16 Jul 2018	18 Jul 2018	2 d	
STC0000029	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 010	16 Jul 2018	18 Jul 2018	2 d	
STC0000030	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HWSTCD1008	23 Jul 2018	25 Jul 2018	2 d	

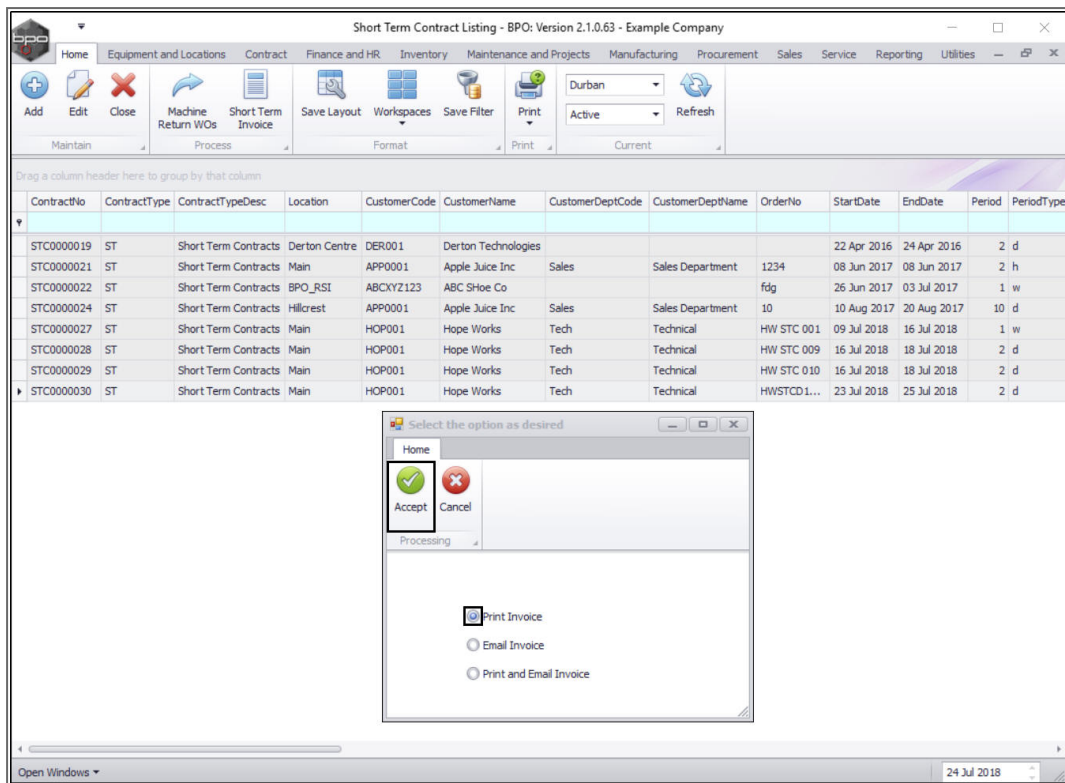
- Select **Print Invoice - Ref []** from the drop-down list.

Note: You will be able to distinguish between the **Deposit** Invoice and the **Short Term** Invoice by the **invoice reference numbers** set up in the Configurator.



SELECT PRINT OPTION

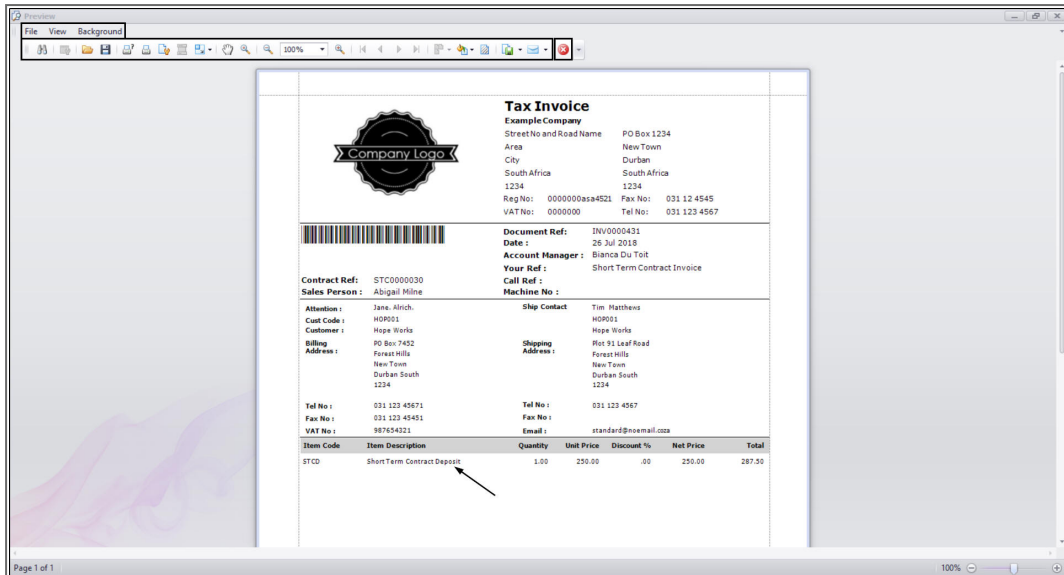
- A **Select the option as desired** screen will pop up with the following options;
 - **Print** : will open the Deposit Invoice in Report Preview to view, print, export or email.
 - **Email**: can attach documents, add recipients, the system will create a pdf and email the Deposit Invoice.
 - **Print/Email**: both the Report Preview and Email screens will pop up.
- Click on the **radio button** in front of the option you want.
- Click on **Accept**.



- The **Report Preview** screen will come up, where **Print** or **Print and Email** is selected
- From here you can **view, print, export** or **email** the Deposit Invoice.

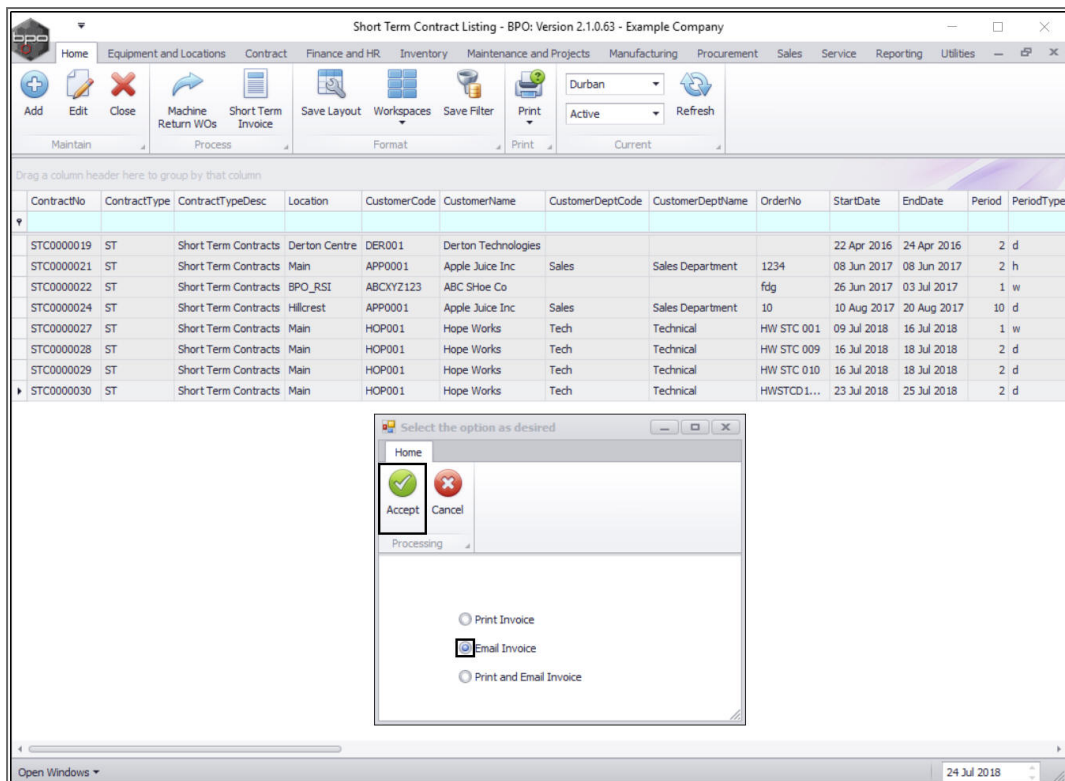
Note: In this image you can see that **Item Code** and **Description** on the invoice reads as **STCD - Short Term Contract Deposit**.

- **Close** the preview screen when you are done.



EMAIL SHORT TERM CONTRACT DEPOSIT INVOICE

- In the *Select the option as desired* pop up screen, click on the *radio* button in front of *Email Invoice*.
- Click on *Accept*.



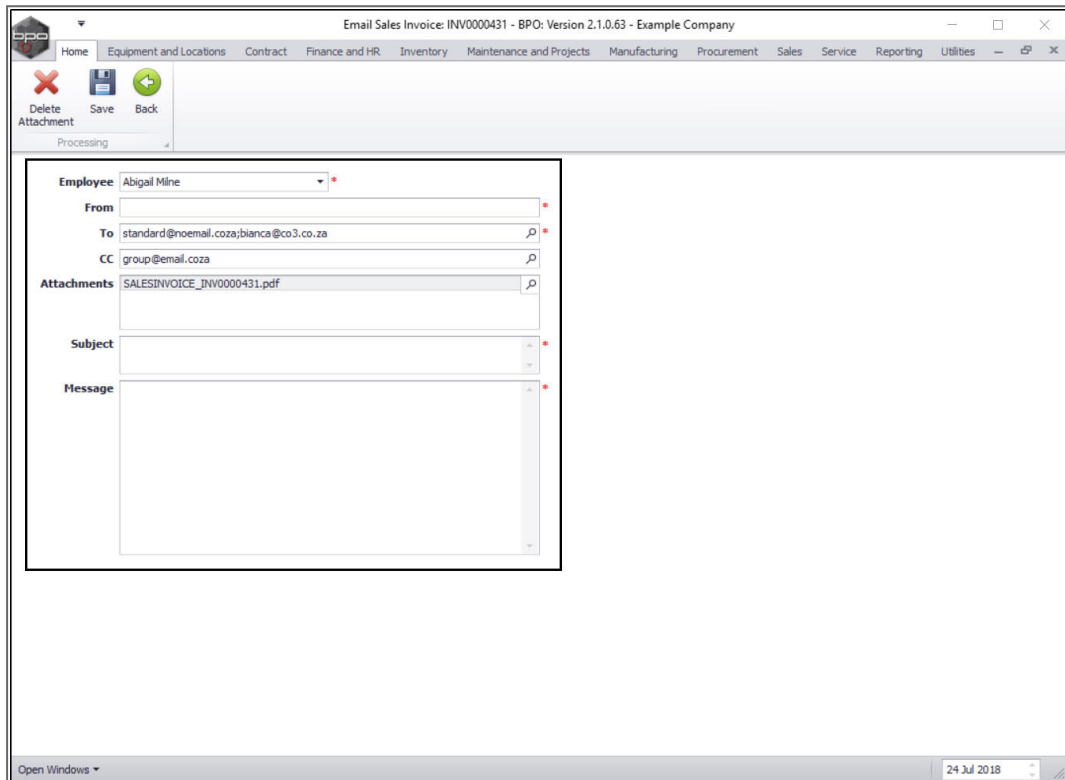
EMAIL DETAILS

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

- **Employee:** This will auto populate with the employee currently logged on to the system. You can click on the drop-down arrow and select an alternative employee if required.
- **From:** Type in the email address of the employee above.
- **To:** This will auto populate with the email address of the customer contact selected on the deposit invoice (the accounts person will be always added to this).
- **CC:** If a group email address has been set up on the order or accounts contact, that will pull through here.
- **Attachments:** BPO will create a PDF of the deposit invoice and attach it automatically (you can attach additional documentation).

- **Subject:** Type in the email subject.
- **Message:** Type in the email message.

Note: If you receive an **'error'** message 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.



The screenshot shows a web-based interface for composing an email. The title bar reads "Email Sales Invoice: INV0000431 - BPO: Version 2.1.0.63 - Example Company". The main content area contains the following fields:

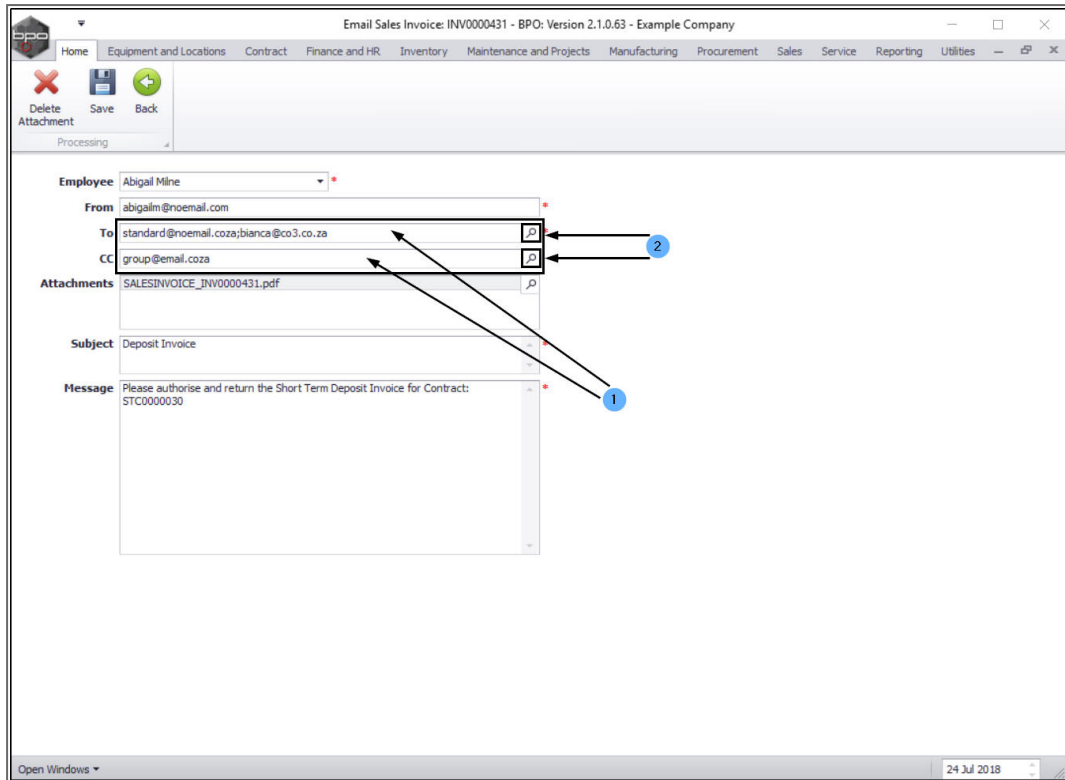
- Employee:** A dropdown menu with "Abigail Milne" selected.
- From:** A text input field.
- To:** A text input field containing "standard@noemail.co.za;bianca@co3.co.za".
- CC:** A text input field containing "group@email.co.za".
- Attachments:** A list box containing "SALESINVOICE_INV0000431.pdf".
- Subject:** A text input field.
- Message:** A large text area for the email body.

At the top left of the form area, there are buttons for "Delete Attachment", "Save", and "Back". A "Processing" status indicator is visible below these buttons. The bottom status bar shows "Open Windows" and the date "24 Jul 2018".

ADDITIONAL EMAIL ADDRESSES

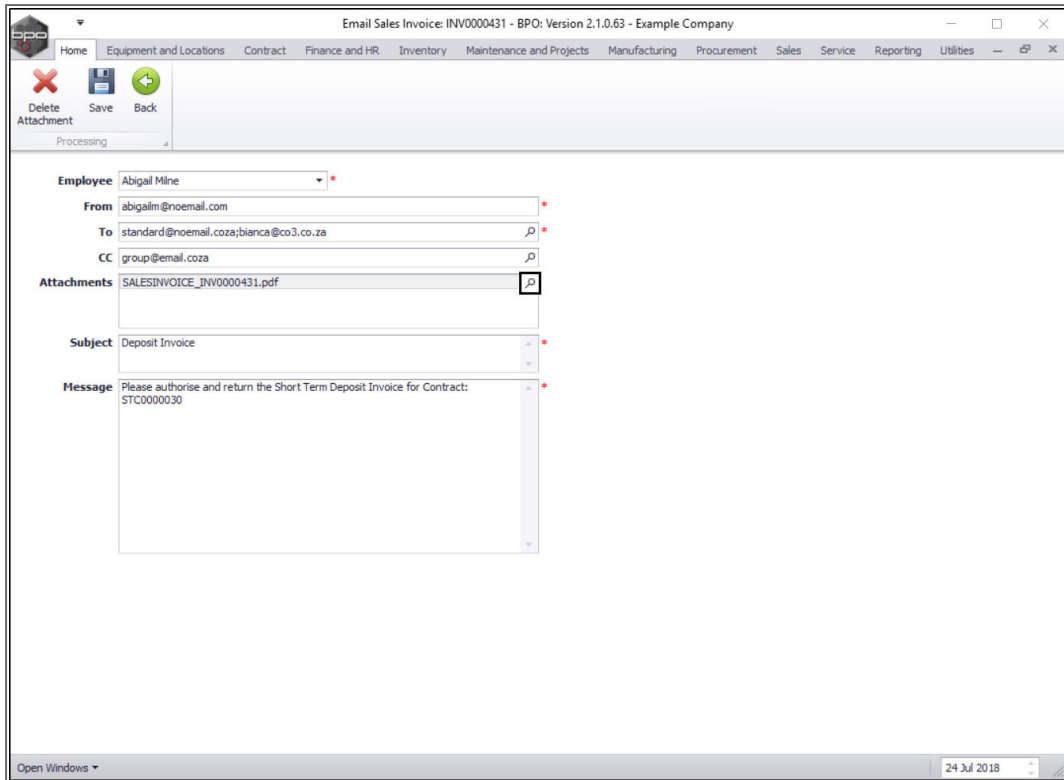
In the **To** or **CC** fields, you can either,

1. type in additional email address(es) (separated by a semi-colon) **or**
2. click on the **search** button and select additional customer contacts.

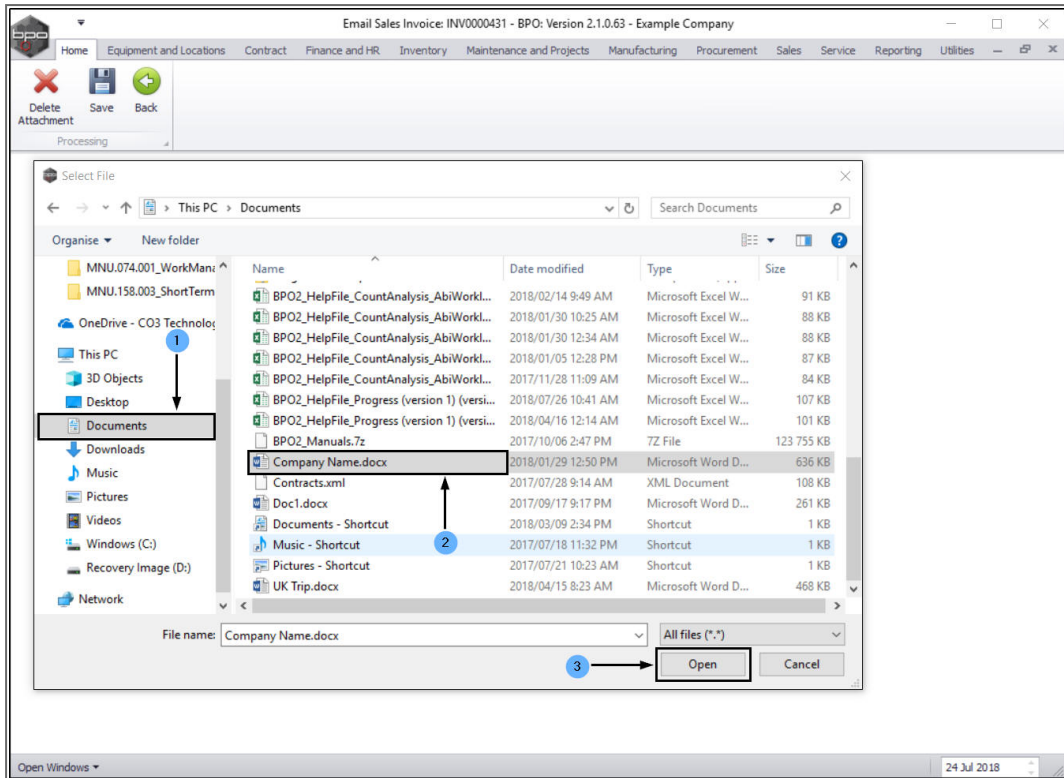


LINK ADDITIONAL DOCUMENTS

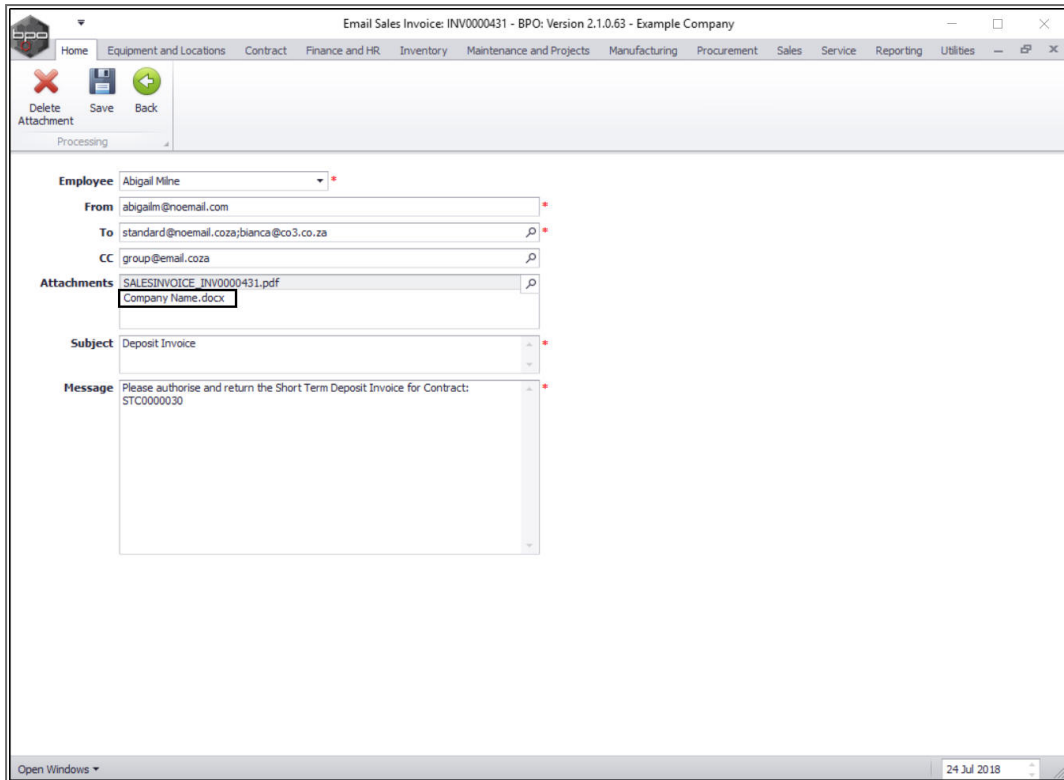
- Click on the *search* button in the *Attachments* field.



- The **Select File: []** screen will pop up.
 1. Select the **file location**.
 2. Click on the **file**.
 3. Click on **Open**.

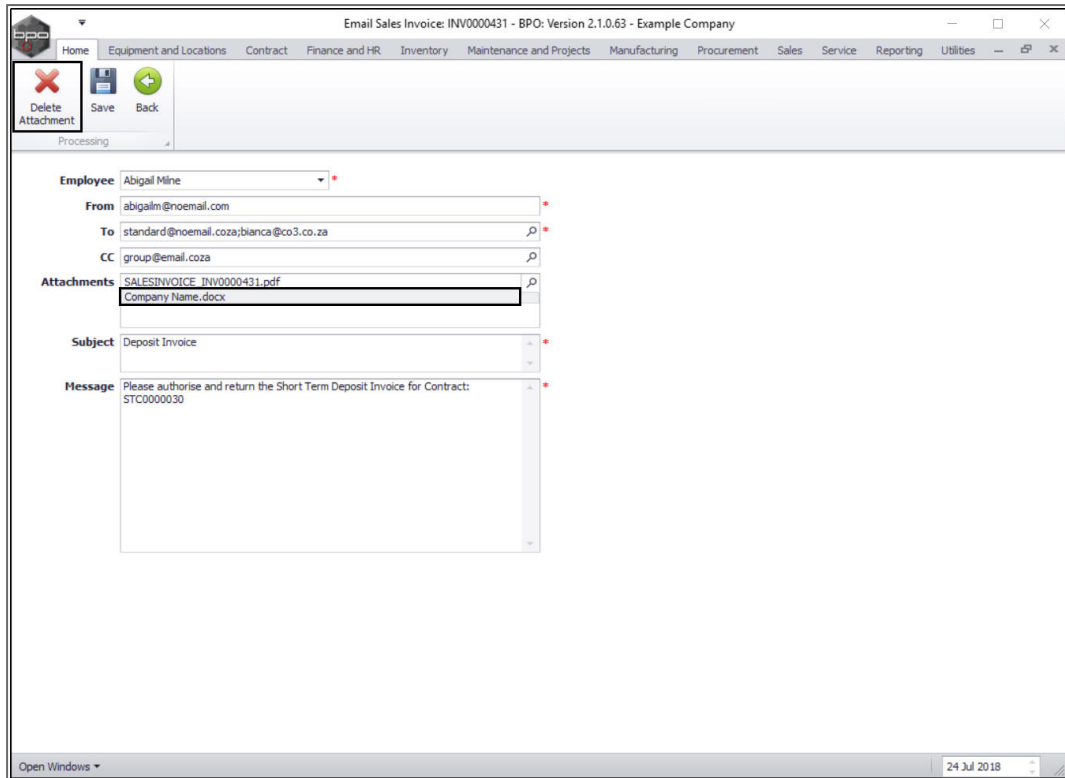


- You will return to the **Email Sales Invoice: []** screen.
- In the **Attachments** field, you will see that the new document has been added.



DELETE ATTACHMENTS

- If you wish to **delete** a document, click on the **document name**.
- Click on **Delete Attachment**.



Employee: Abigail Mine

From: abigalmine@noemail.com

To: standard@noemail.co.za; bianca@co3.co.za

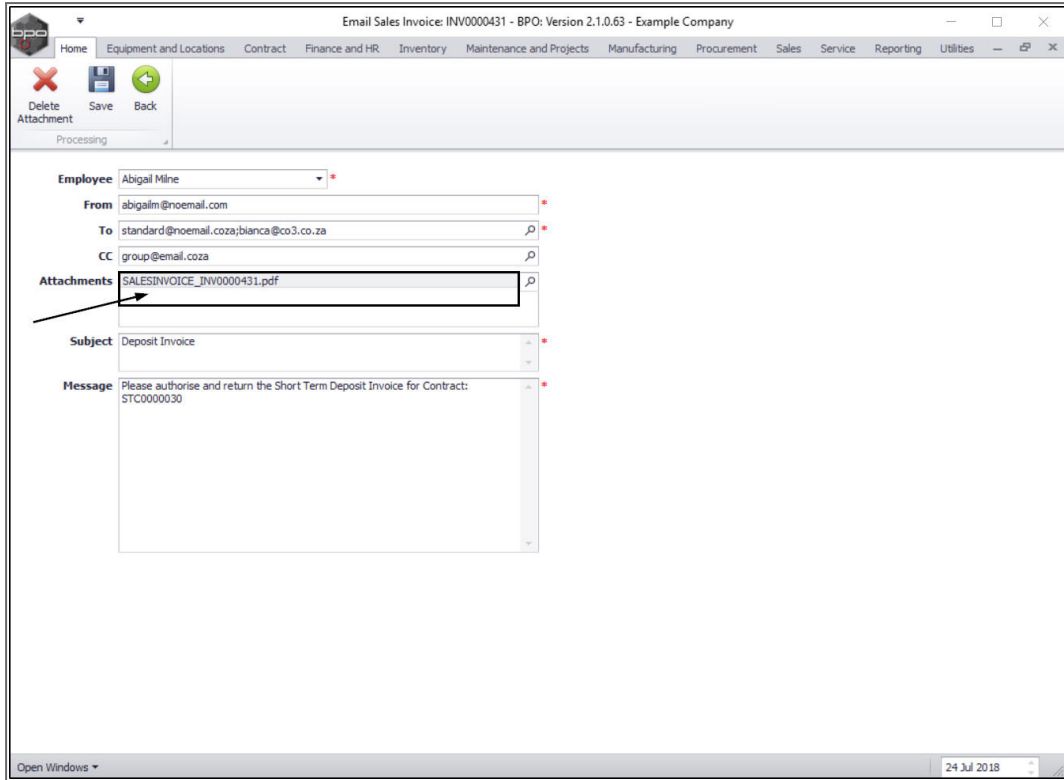
CC: group@email.co.za

Attachments: SALESINVOICE_INV0000431.pdf
Company Name.docx

Subject: Deposit Invoice

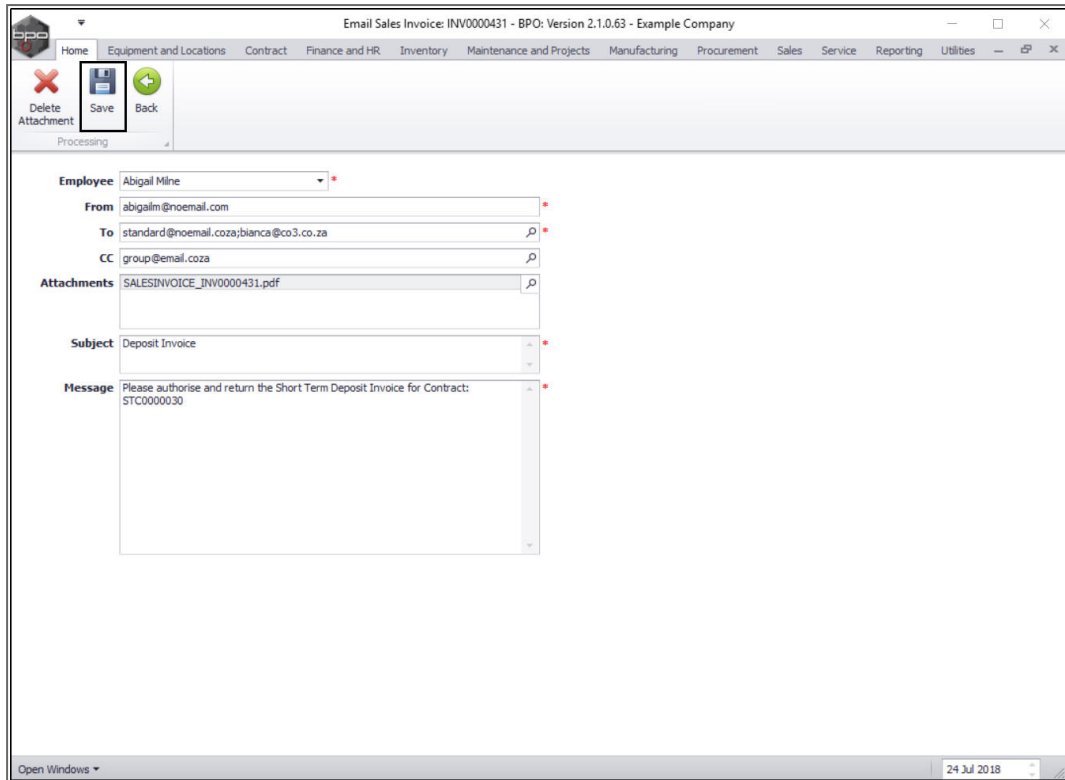
Message: Please authorise and return the Short Term Deposit Invoice for Contract: STC0000030

- The document will be **removed** from the **Attachments** field.



SAVE AND SEND EMAIL

- When you have finished adding all the details to the **Email Sales Invoice: []** screen, click on **Save**.



- The email will be sent via the BPO Email Service on the server and you will return to the *Short Term Contract Listing* screen.

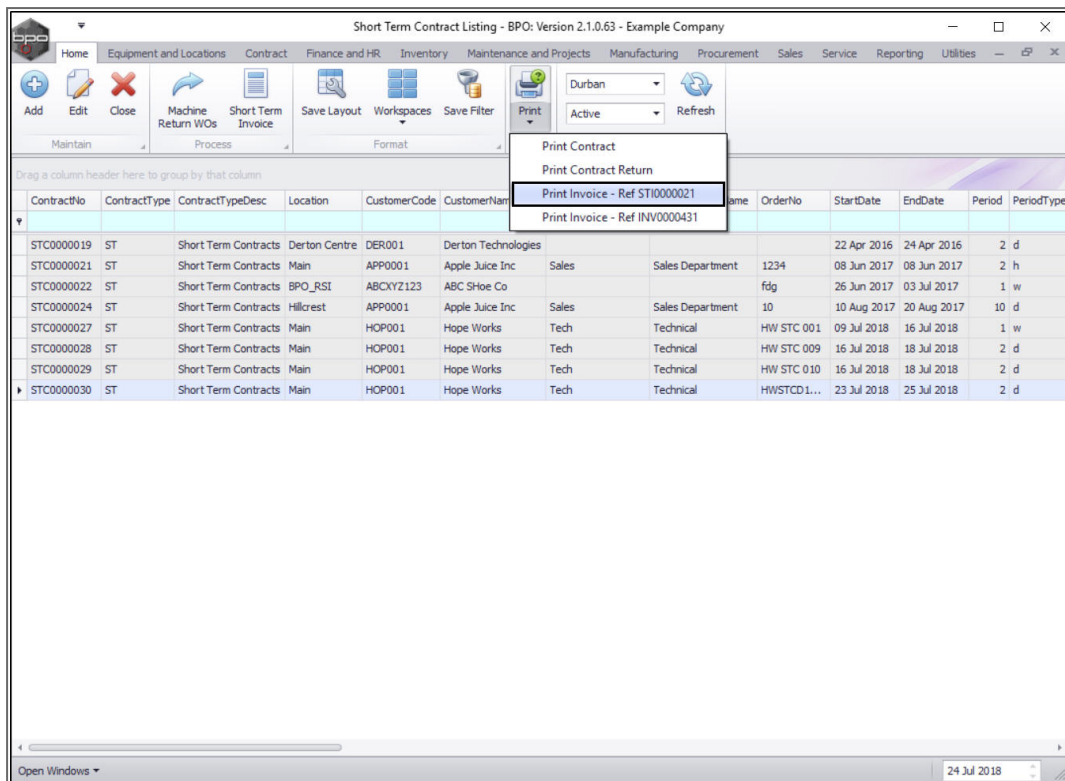
PRINT SHORT TERM CONTRACT (FINAL) INVOICE

- Select the *row* of the contract where you wish to *print* the (final) *Invoice*.
- Click on the drop-down *arrow* on the *Print* button.

ContractNo	ContractType	ContractTypeDesc	Location	CustomerCode	CustomerName	CustomerDeptCode	CustomerDeptName	OrderNo	StartDate	EndDate	Period	PeriodType
STC0000019	ST	Short Term Contracts	Derton Centre	DER001	Derton Technologies				22 Apr 2016	24 Apr 2016	2 d	
STC0000021	ST	Short Term Contracts	Main	APP0001	Apple Juice Inc	Sales	Sales Department	1234	08 Jun 2017	08 Jun 2017	2 h	
STC0000022	ST	Short Term Contracts	BPO_RST	ABCXYZ123	ABC Shoe Co			fdg	26 Jun 2017	03 Jul 2017	1 w	
STC0000024	ST	Short Term Contracts	Hillcrest	APP0001	Apple Juice Inc	Sales	Sales Department	10	10 Aug 2017	20 Aug 2017	10 d	
STC0000027	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 001	09 Jul 2018	16 Jul 2018	1 w	
STC0000028	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 009	16 Jul 2018	18 Jul 2018	2 d	
STC0000029	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 010	16 Jul 2018	18 Jul 2018	2 d	
STC0000030	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HWSTCD1008	23 Jul 2018	25 Jul 2018	2 d	

- Select **Print Invoice - Ref []** from the drop-down list.

Note: Remember, you will be able to distinguish between the **Deposit Invoice** and the **Short Term Invoice** by the **Invoice Reference numbers** as set up in the Configurator.



SELECT PRINT OPTION

A *Select the option as desired* screen will pop up with the following options;

- **Print:** - will open the Invoice in Report Preview to view, print, export or email.
 - **Email:** - can attach documents, add recipients, the system will create a PDF and email the Invoice.
 - **Print/Email:** - both the Report Preview and Email screens will pop up.
- Click on the **radio** button in front of the option you want.
 - Click on **Accept**.

ContractNo	ContractType	ContractTypeDesc	Location	CustomerCode	CustomerName	CustomerDeptCode	CustomerDeptName	OrderNo	StartDate	EndDate	Period	PeriodType
STC0000019	ST	Short Term Contracts	Derton Centre	DER001	Derton Technologies				22 Apr 2016	24 Apr 2016	2 d	
STC0000021	ST	Short Term Contracts	Main	APP0001	Apple Juice Inc	Sales	Sales Department	1234	08 Jun 2017	08 Jun 2017	2 h	
STC0000022	ST	Short Term Contracts	BPO_RST	ABCXYZ123	ABC Shoe Co			fdg	26 Jun 2017	03 Jul 2017	1 w	
STC0000024	ST	Short Term Contracts	Hillcrest	APP0001	Apple Juice Inc	Sales	Sales Department	10	10 Aug 2017	20 Aug 2017	10 d	
STC0000027	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 001	09 Jul 2018	16 Jul 2018	1 w	
STC0000028	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 009	16 Jul 2018	18 Jul 2018	2 d	
STC0000029	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HW STC 010	16 Jul 2018	18 Jul 2018	2 d	
STC0000030	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	HWSTCD1...	23 Jul 2018	25 Jul 2018	2 d	

- Now follow the same processes as explained above to;
 - [Print](#) the Invoice.
 - [Email](#) the Invoice.
 - [Link Additional Documents](#) to the Invoice.
 - [Delete Attachments](#) from the Invoice.

MNU.158.004

