

We are currently updating our site; thank you for your patience.

# SALES

## SALES MODULE SET UP

The **Sales** module covers:

- Customers
- Services
- Over the Counter Sales
- Sales Quotes
- Sales Orders
- Sales Invoices
- Sales Credit Notes

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### Customer Static Data Required

Customer Type - required for use in **BPO** and **BPOCRM**. Each customer must be linked to a Customer Type. The Customer Type field is **mandatory** when creating a Customer in **BPO**. The system can be configured to **not** require the Customer Type when first creating a **New** Customer in **BPOCRM**, but then the Customer Type will need to be linked to the customer in **BPO** before authorising the customer.

Customer Contact Type - **ACCOUNTS** contact type - feeds to **Pastel Evolution** (if not set up, the **Primary Contact** is used).

Bank Name - to be set up if using customer banking details.

Account Type - to be set up if using customer banking details.

[Payment Method](#) - to be set up if using customer banking details. If a customer needs to be included in the Debit Order run, you need to ensure a Payment Method is selected where the Payment Method 'Code Type' is 'DO'.

### **SALES STATIC DATA REQUIRED**

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[Credit Terms](#) - standard terms configured: COD, 30 day, 60 day, etc. You can edit the descriptions (not the codes) of these if you want the relevant information to show on the invoice, i.e. 30 days from Invoice / 30 days from Statement.

- [Service Class](#)
- [Service Type](#)
- [Service Unit of Measure](#)
- [Sales Quote Repayment Method](#)
- [Credit Note Reason](#)

### **CRM CONFIGURATION**

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- [Recommendations](#)
- [General Settings](#)
- [Configuration Notes and User Rights](#)

### **CALL STATIC DATA**

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- [Call Types](#)
- [Set Call Type Colours](#)
- [Error Codes](#)
- [Call Hold Reason Code](#)
- [Call Pending Reason Code](#)

## WORK ORDER STATIC DATA

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- [Work Order Types](#)
  - [Work Order Rectification Codes](#)
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### Related Topics

- [Customers](#)
- [Quotes](#)
- [Invoices](#)
- [Credit Notes](#)
- [Services](#)

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