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

CRM CUSTOMERS

INVOICES

You can view, download, print and/or email Sales Invoices for your Customers in CRM.

However, Sales Invoices are **created** in BPO only.

Ribbon Access: Webpage > http://[servername]:[port-no]/BPOCRM/User.aspx

NAVIGATE TO CUSTOMER DASHBOARD (CUSTOMER HOME PAGE)

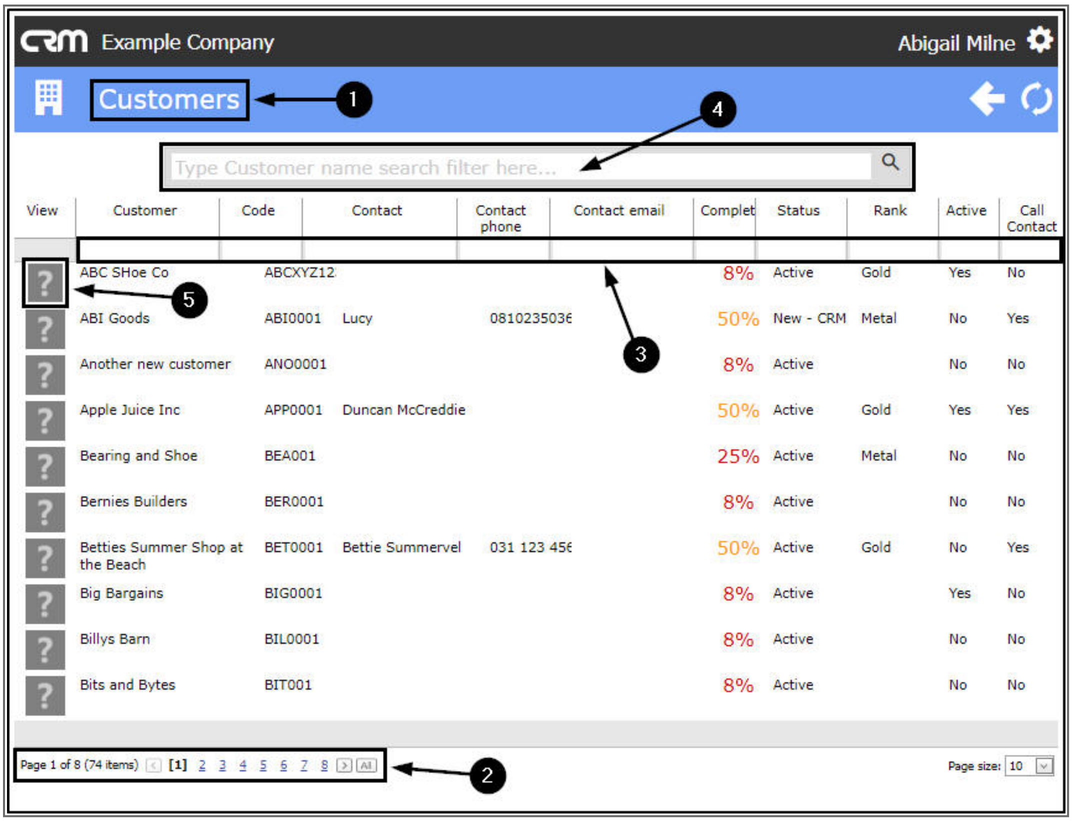
To access your customer-specific list of Invoices, you will first need to navigate to the Customer Dashboard (Customer Home page).

1. In the **Dashboard** (Home page),
2. Click on the **Customers** tile.

1. The **Customers** listing page will open.

SEARCH AND SELECT CUSTOMER

2. You can use the Page Reference field,
3. the Filter Row or
4. the Filter Text Box to **search** for your customer.
5. Click on the selected **Customer icon** in the **View** column.



1. The **Customer Dashboard** (Customer Home page) will open.
2. Click on the **Invoices** tile.

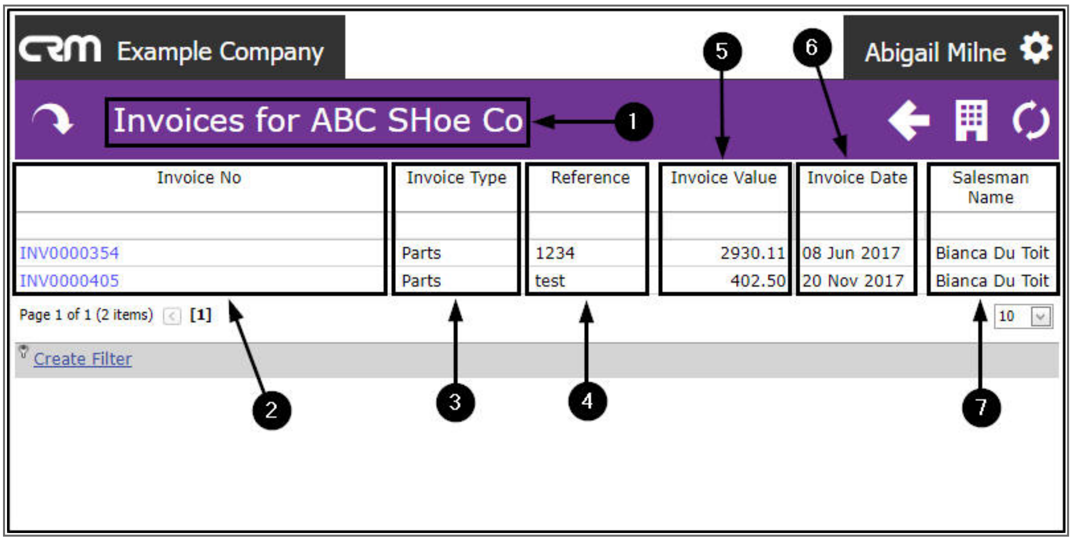
The **Invoices for [**selected customer**]** listing page

1. The **Invoices for [**selected customer**]** listing page will open.
2. All of the Invoices linked to this customer will be displayed (even ones where you are not the Salesman).

The following information columns can be viewed in this page:

3. **Invoice Type** (e.g. Parts)
4. Invoice **Reference** number

5. **Invoice Value**
6. **Invoice Date** and the
7. **Salesman Name** of each Invoice.

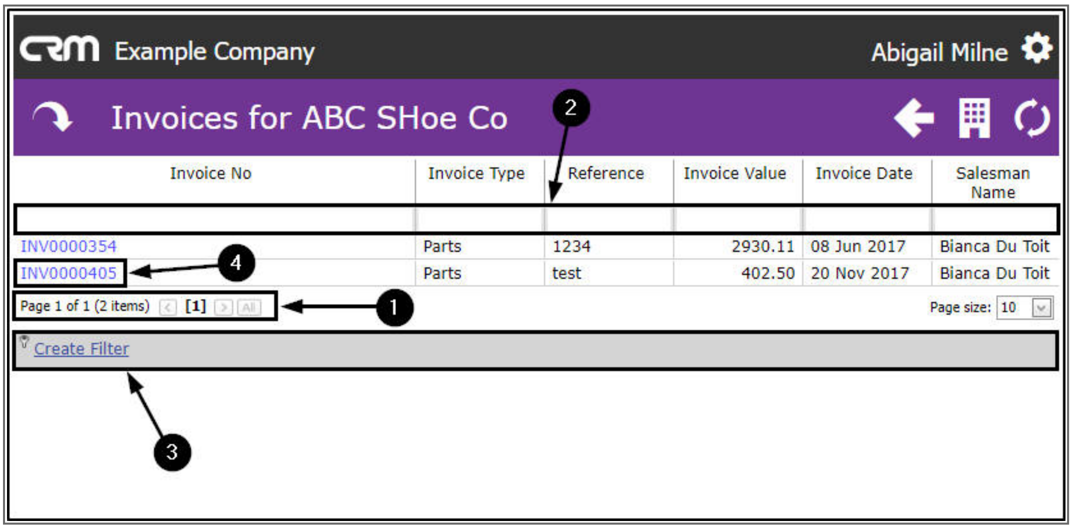


SEARCH AND SELECT INVOICE

1. You can use the Page Reference field or the
2. Filter Row or the
3. Create Filter Row functionality to search for a particular Invoice.

VIEW / DOWNLOAD / PRINT CUSTOMER INVOICE

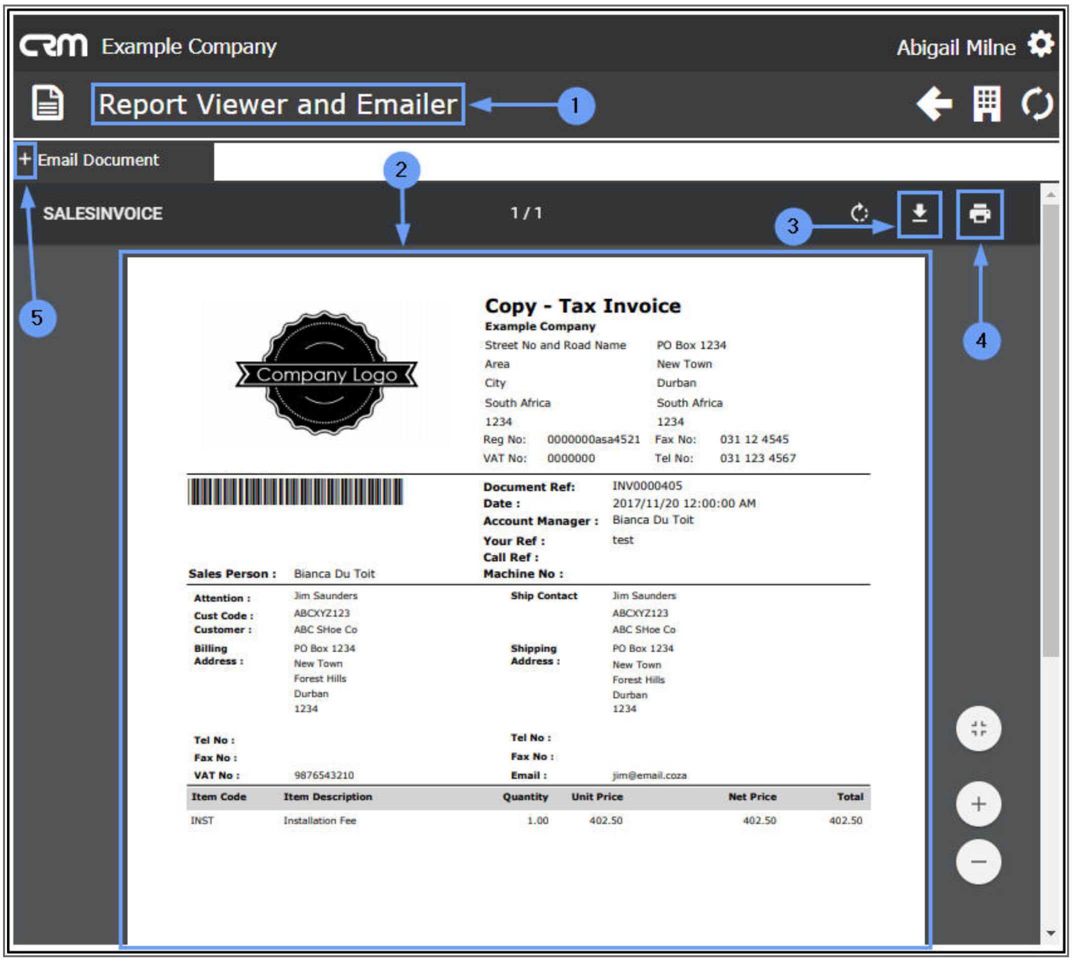
4. In the **Invoice No.** column, click on the blue number of the Invoice that you wish to **View**, **Print** or **Download** .



1. The **Report Viewer and Emailer** page will open.
2. The selected Invoice will be displayed.
3. Here you can **Download** the Invoice and/or
4. **Print** the Invoice.

EMAIL ORDER

5. Click on the expand icon [**+**] on the **Email Document** tab.



1. The **Email Document** frame will be expanded.

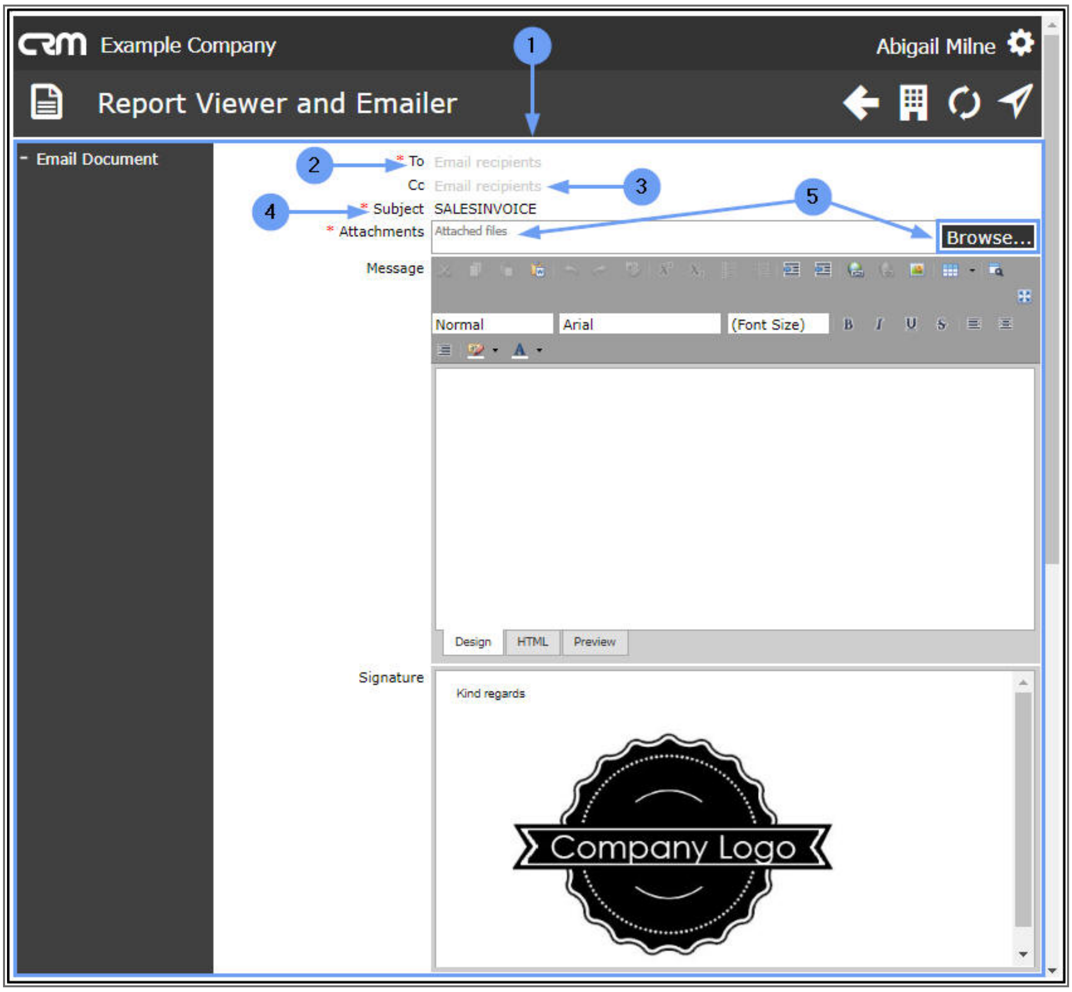
   Check and/or add the following details, as necessary:

2. **To:** Either click in the field and select the preferred contact from the list, or type in the contact email address.
3. **Cc:** Here, you can add other email recipients, if applicable.
   - Either click in the field and select customer contacts from the list, or type in additional addresses as noted above (separated by a semi-colon and a space).
4. **Subject:** This field will auto populate with **Sales Invoice** but you can edit this, if required.

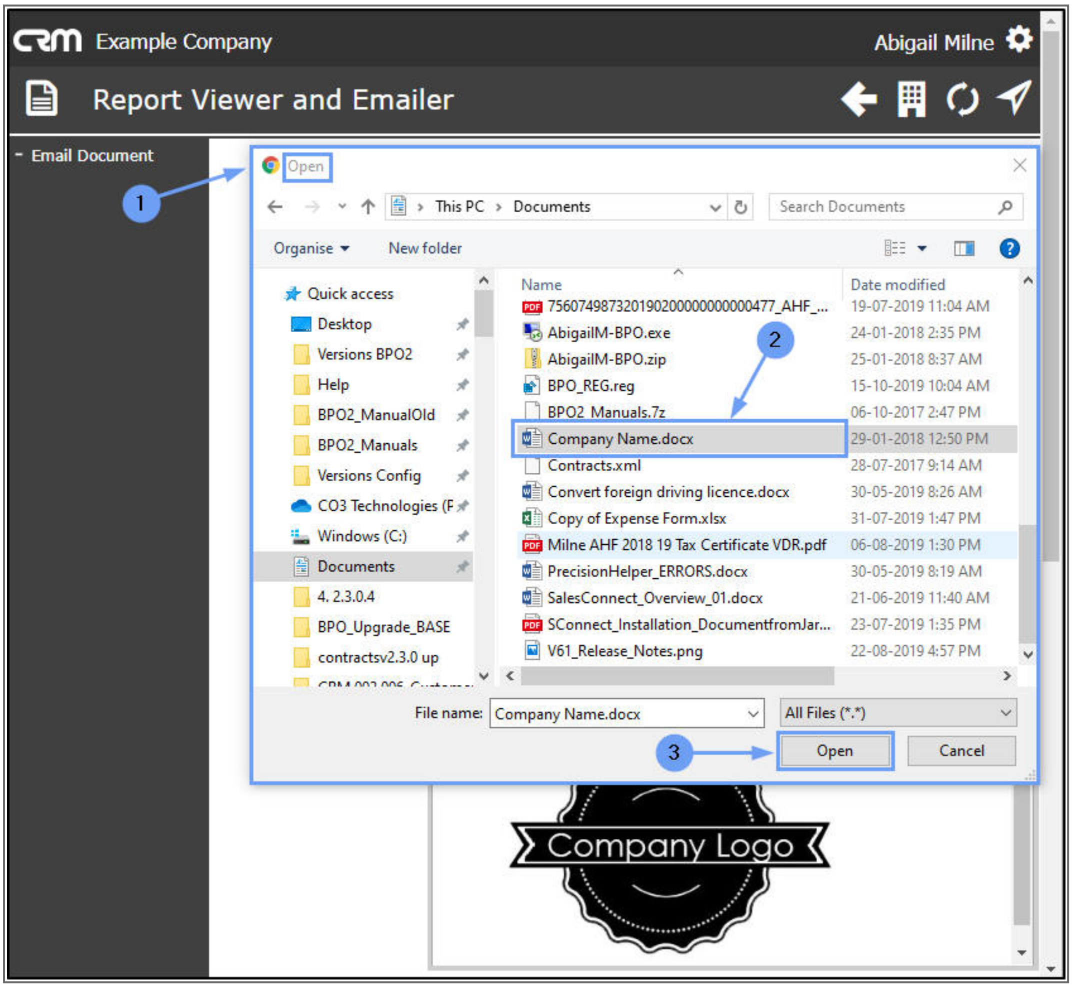
ADD AN ATTACHMENT

You can add other documents, as attachments, if required.

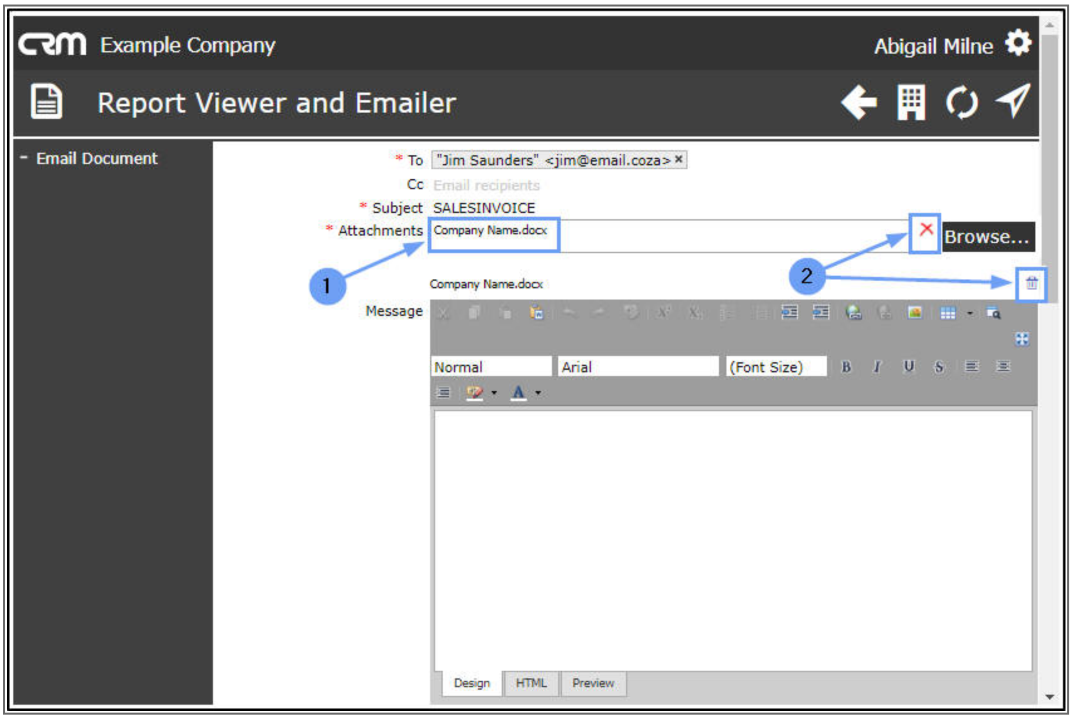
5. **Attachments:** Click on **Browse**.



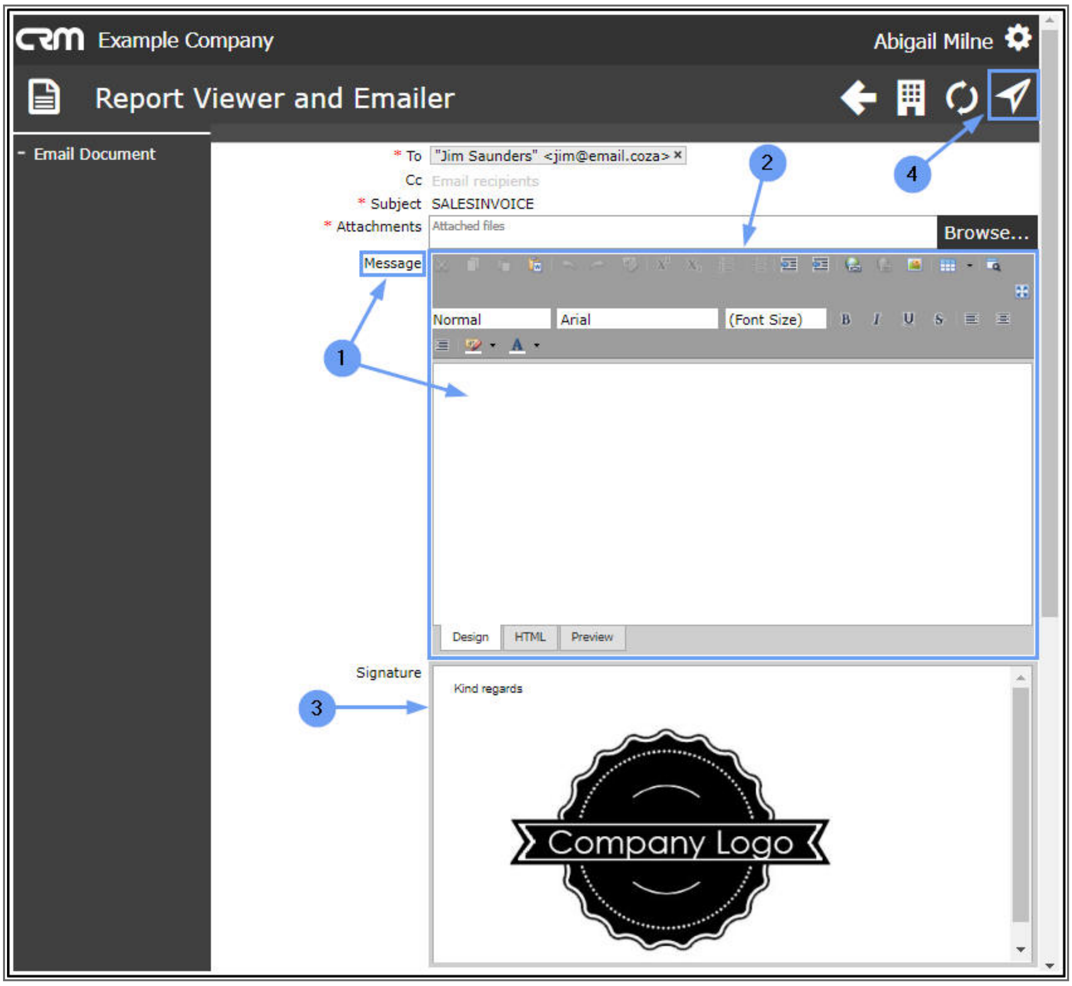
1. The **Open** screen will pop up.
2. Search for and select the file you wish to link to this Invoice.
3. Click on **Open** .



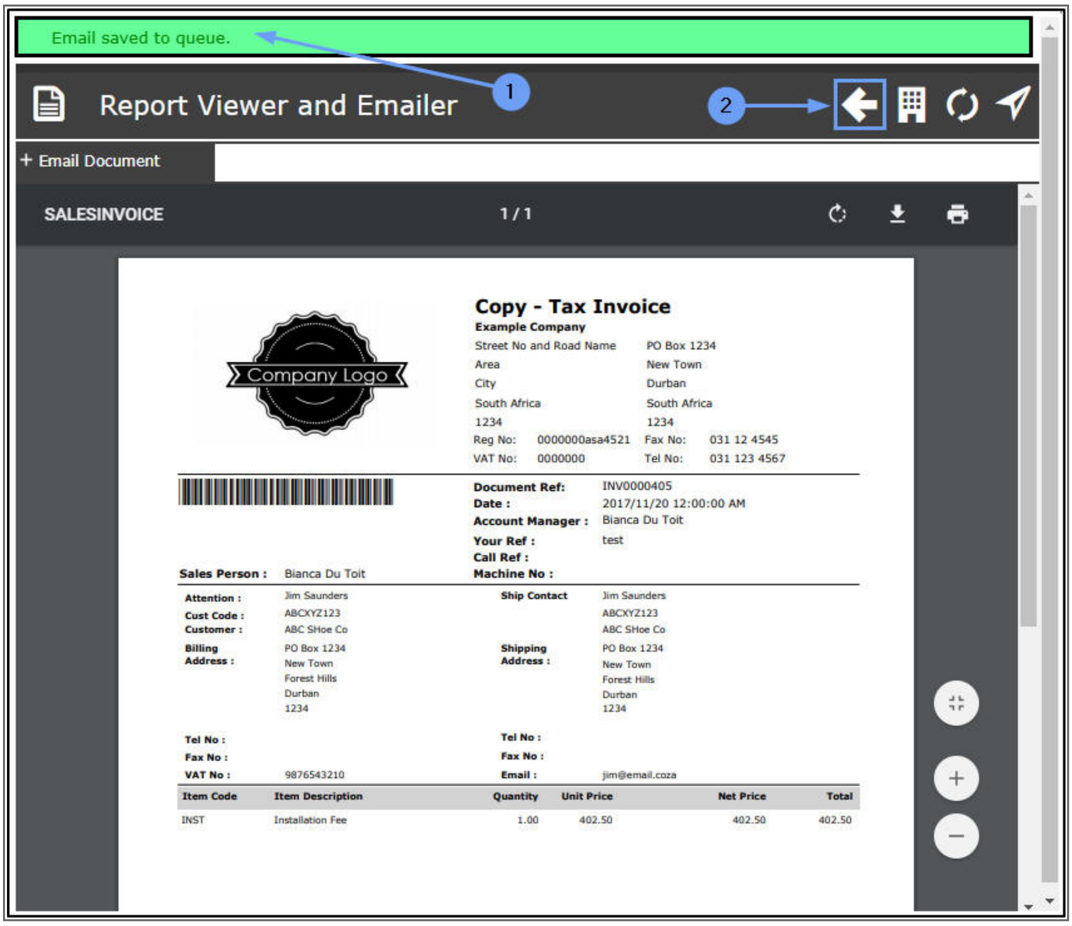
1. The file will now be attached to the email.
2. You can delete the attachment if required by clicking on either of the **Delete** icons.



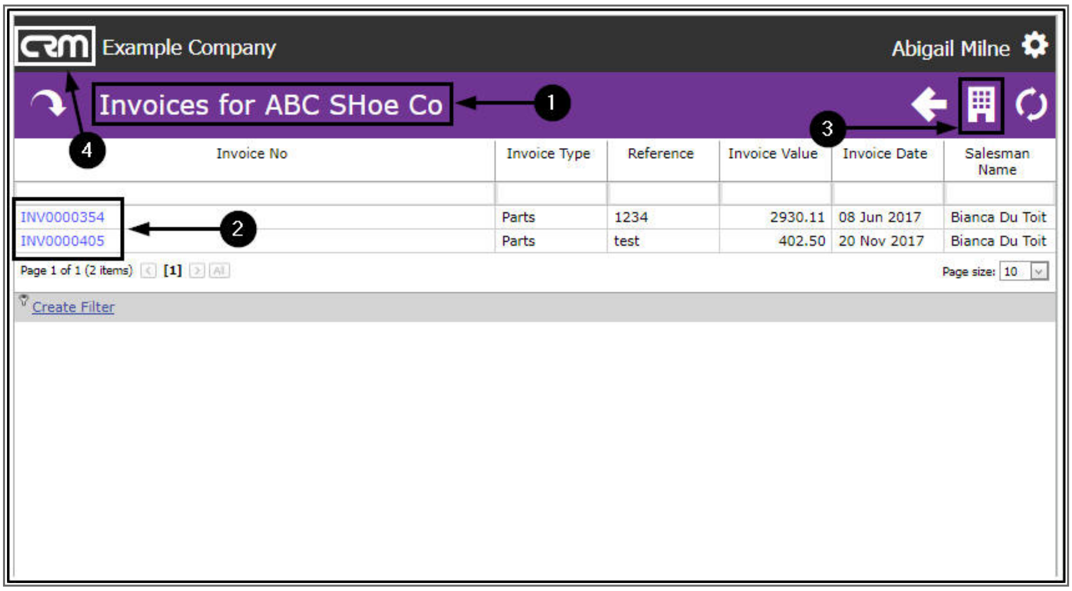
1. Type a relevant message in the **Message** body.
2. The **Message tool bar** can be used to customise your email message.
3. **Signature**: If you have a Signature configured in CRM - your Signature will pull through here, otherwise the Company default CRM mail signature will pull through.
4. Click on the **Send** icon.



1. A **message box** will pop up informing you of the status of the sent email.
2. Click on **Back** .



1. You will return to the **Invoices for [**selected customer**]** listing page.
2. Select another Invoice to View, Download, Print or Email, if required.
3. Click on the **Customers** icon to return to the **Customer Dashboard** (Customer Home page).
4. Click on the **CRM** icon to return to the **Dashboard** (Home page).


Example Company
Abigail Milne
Invoices for ABC SHoe Co
1
2
3
4
Invoice No
Invoice Type
Reference
Invoice Value
Invoice Date
Salesman Name
INV0000354
Parts
1234
2930.11
08 Jun 2017
Bianca Du Toit
INV0000405
Parts
test
402.50
20 Nov 2017
Bianca Du Toit
Page 1 of 1 (2 items)
[1]
Page size: 10
Create Filter

CRM.002.008