

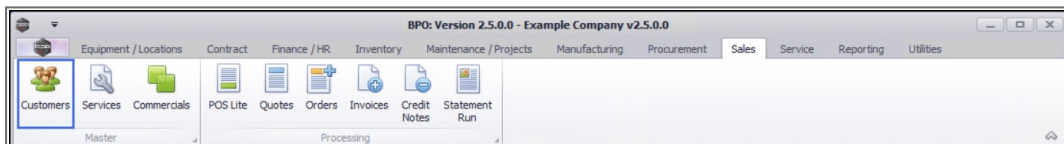
We are currently updating our site; thank you for your patience.

SALES

CUSTOMERS – PRINT CUSTOMER STATEMENT

When using the '**Email**' option to send a Customer Statement, note that it will be emailed via the **BPO Email Service** on the **server** and not from Microsoft Outlook on your desktop.

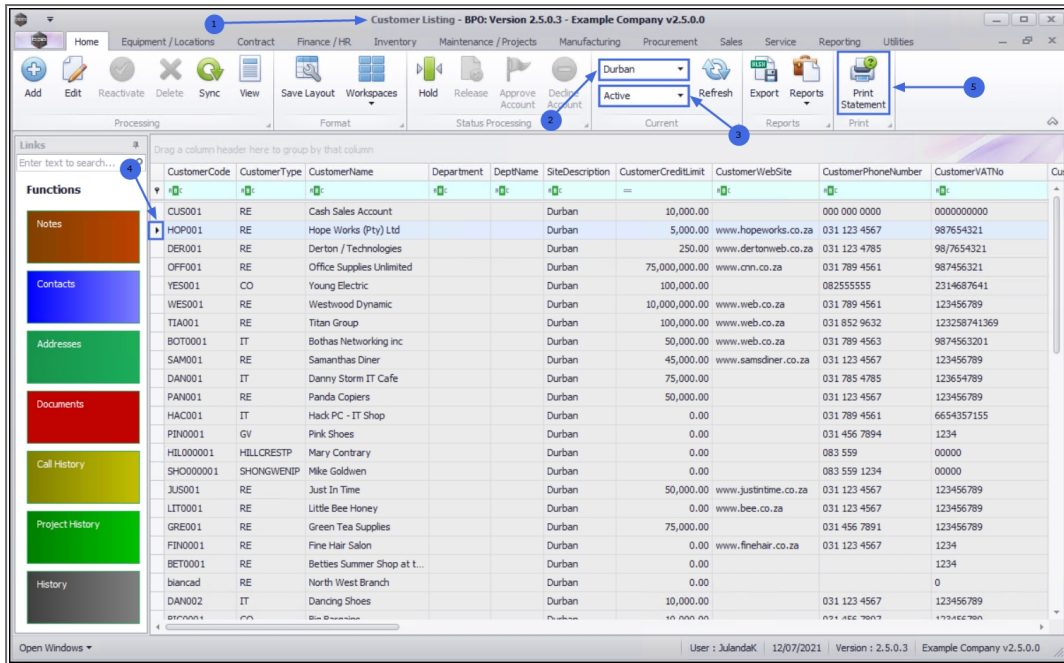
Ribbon Access: Sales > Customers



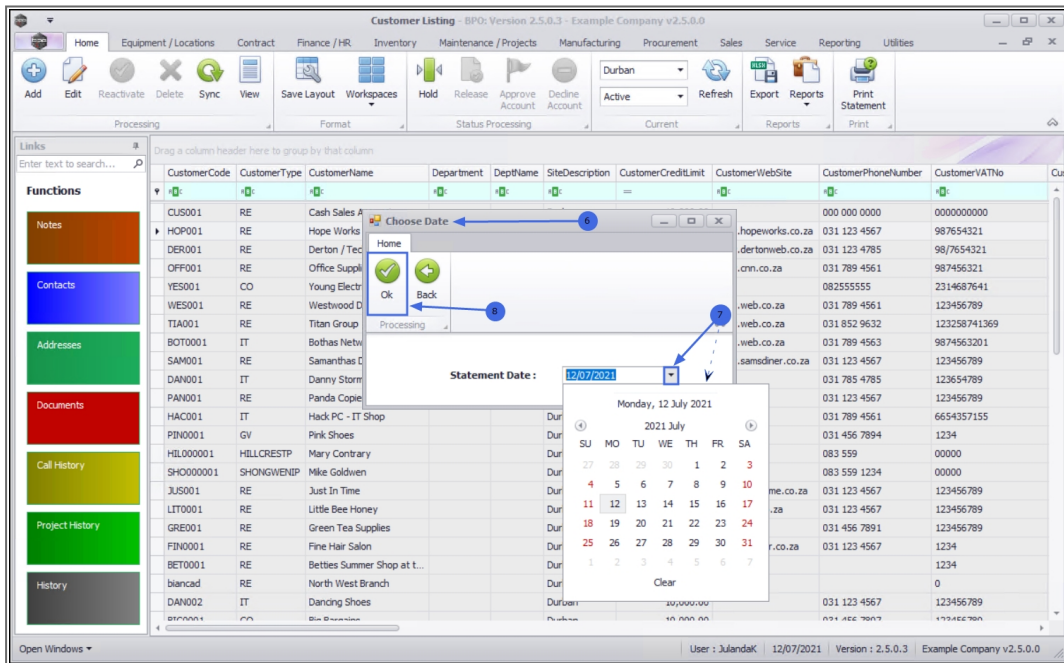
1. The **Customer Listing** screen will be displayed.
2. Select the **Site** where the Customer can be located.
 - The example has **Durban** selected.
3. Select the **Status** of the Customer you wish to print a Statement for.

You can print a Customer Statement from any Status.

- The example has **Active** selected.
4. Click on the **row** of the **Customer** you wish to print a statement for.
 5. Click on **Print Statement**.



- The **Choose Date** screen will be displayed.
- Statement Date:** Type in the date or click on the down arrow to select the date using the **Calendar** function.
- Click on **OK**.



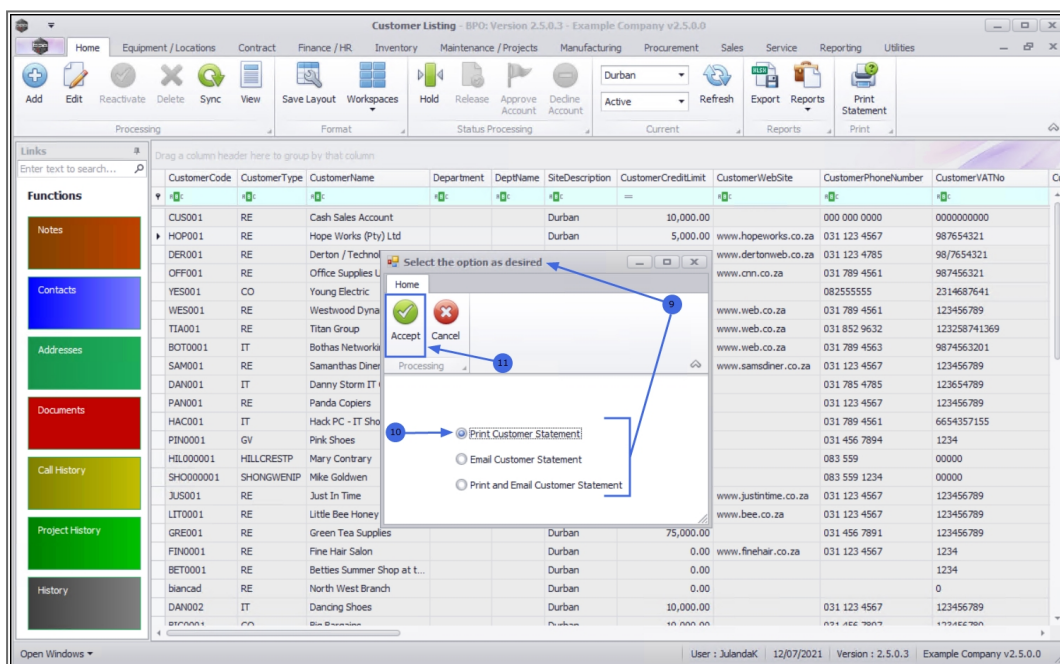
9. The **Select the option as desired** screen will display.

- **Print Customer Statement** will open the Statement in the Preview screen to view, print, export or email.
- **Email Customer Statement** will allow you to add recipients and the system will create a .pdf of the Statement as an Attachment to the email.
- **Print and Email Invoice** will display both the Report Preview and Email screens.

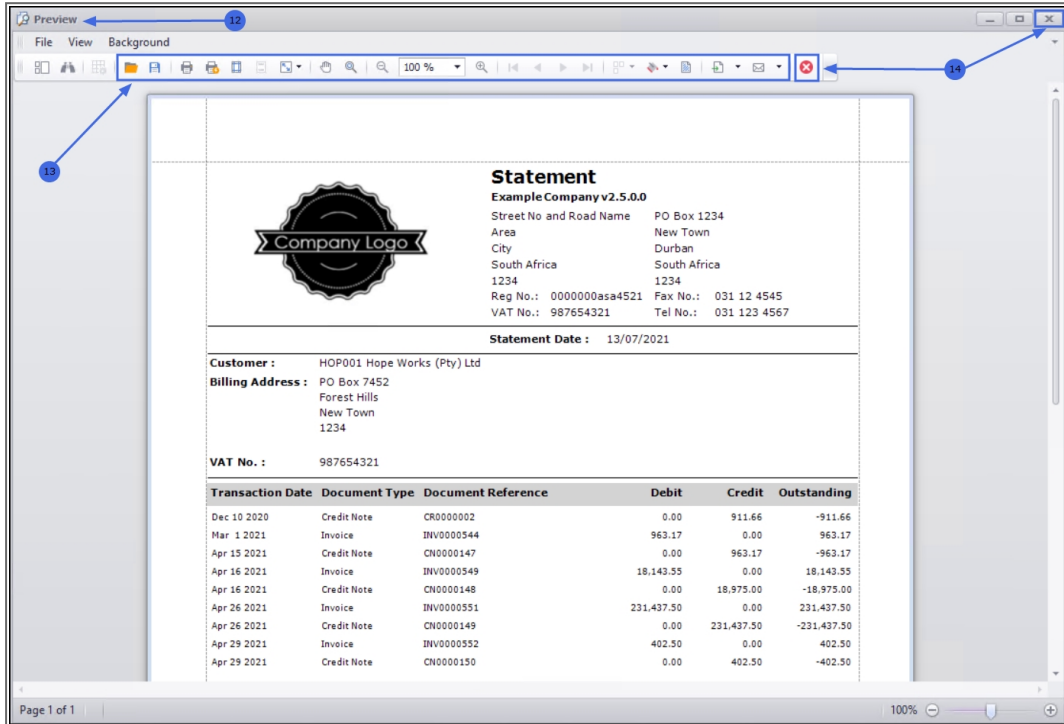
PRINT CUSTOMER STATEMENT

10. To print the Statement, click on the **Print Customer Statement** radio button.

11. Click on **Accept**.



12. The Customer Statement will display in the **Preview** screen.
13. From the preview screen you can make cosmetic changes to the Statement, as well as **Save, Zoom, Add a Watermark, Export** or **Email**.
14. Click **Close** to return to the **Customer** listing screen.

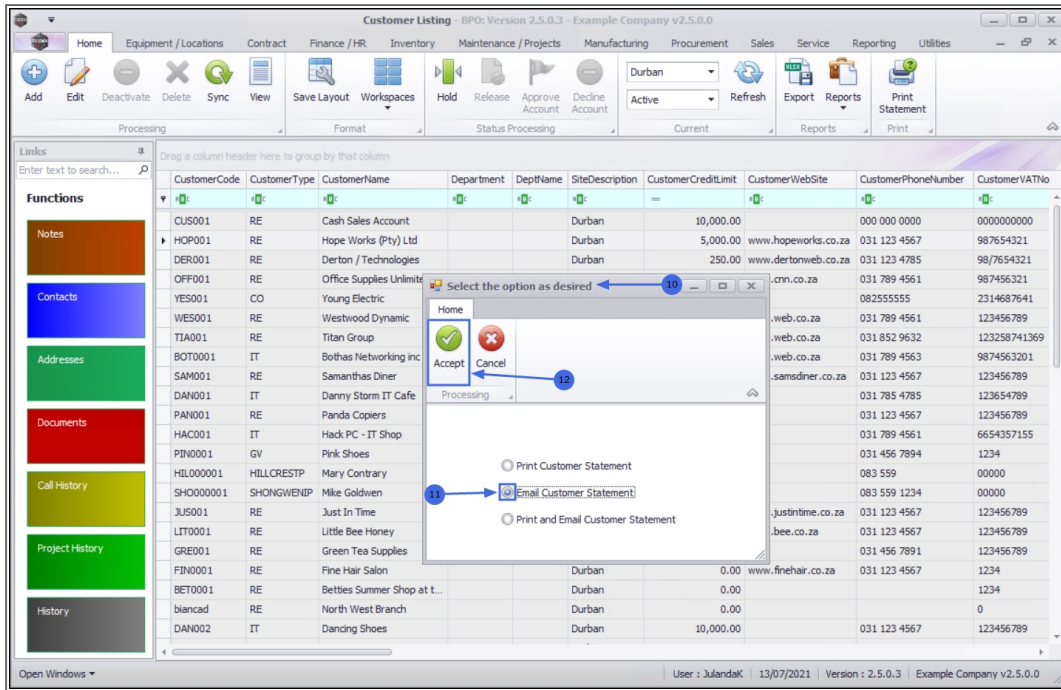


EMAIL CUSTOMER STATEMENT



If you get an error when trying to email the statement, 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.

10. From the **Select the option** as desired screen,
11. Click on the **Email Customer Statement** radio button.
12. Click on **Accept**.



13. The **Email Sales Invoice: INV**[invoice number] screen will display, for both Email Invoice or Print and Email Invoice options.

EMAIL HEADER

- **Employee:** The employee who is currently logged on will display in the employee field. Click on the down **arrow** to choose an alternative employee name, if required.
- **From:** The email address of the employee will display in this field.
- **To:** To add a contact 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 email address of the **Customer Contact** you wish to add.
 - iii. Click on **OK**.
- **CC:** If a group email address has been set up on the order or accounts contact, then the group email address will display here.



Note that additional email addresses can be added to either the **To:** or **CC:** by separating the email address with a [;].

The example has the accounts contact person added to **To:** jack-ie@builderStorehouse.co.za; accounts@builderStorehouse.co.za.

The screenshot shows a software interface for composing an email. The main window has a menu bar with options like Home, Equipment/Locations, Contract, Finance/HR, Inventory, Maintenance/Projects, Manufacturing, Procurement, Sales, Service, and Reports. Below the menu is a toolbar with 'Delete Attachment', 'Save', and 'Back' buttons. The email form includes fields for 'Employee' (Jeff Rivers), 'From' (Jeff@TEST ALPHA v2.4.0.0 DB.co.za), 'To' (jackie@buildersStorehouse.co.za; accounts@builderStorehouse.co.za), 'CC' (group@buildersStorehouse.co.za), 'Attachments' (SALESINVOICE_INV0000542.pdf), and 'Subject' (Tax Invoice - INV0000542). The message body starts with 'Dear Jackie,' and 'Attached please find the latest Tax Invoice for Builders Storehouse records. Kind Regards'. A 'Select a contact for this email' dialog is open, showing a table of contacts:

ParentContactName	ContactType	ContactTypeDesc	ContactFirstName
+	+	+	+
			Jackie
	ACCOUNTS	Accounts Contact	Jerry

The dialog also has 'Ok', 'Back', and 'Save Layout' buttons, and a 'Process' button. A status bar at the bottom shows 'User: JulandaK | 03/03/2021 | Version: 2.4.0.11 | Example Company'.

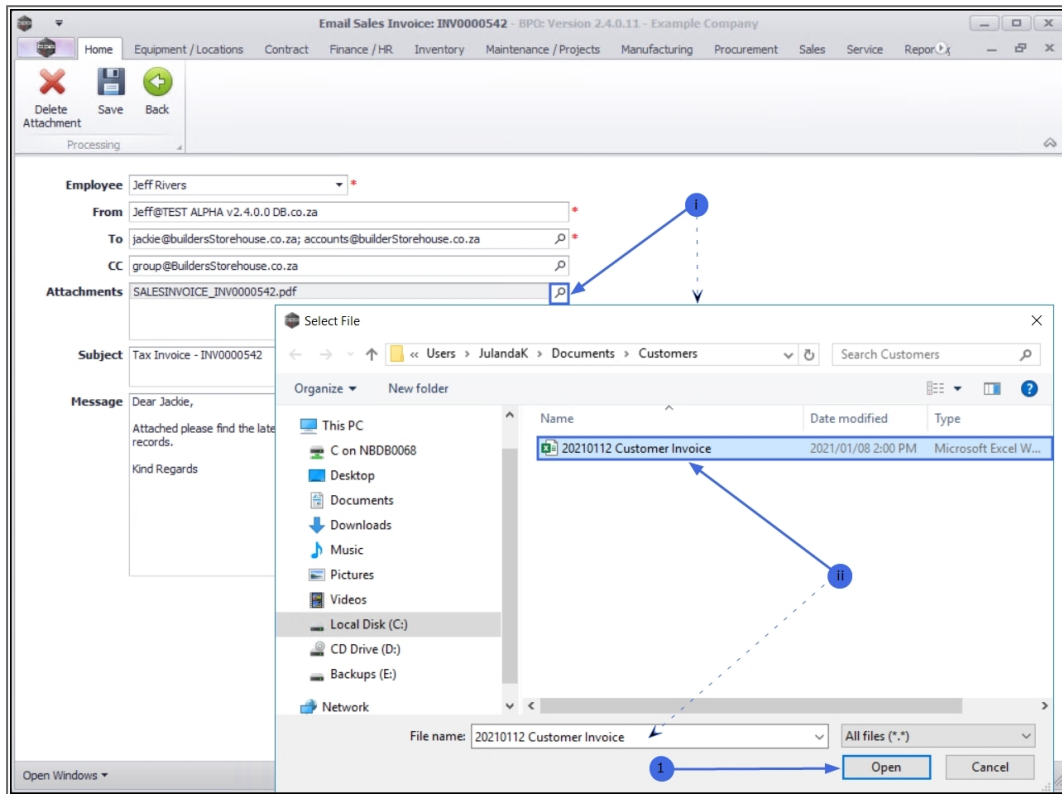
EMAIL ATTACHMENTS

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

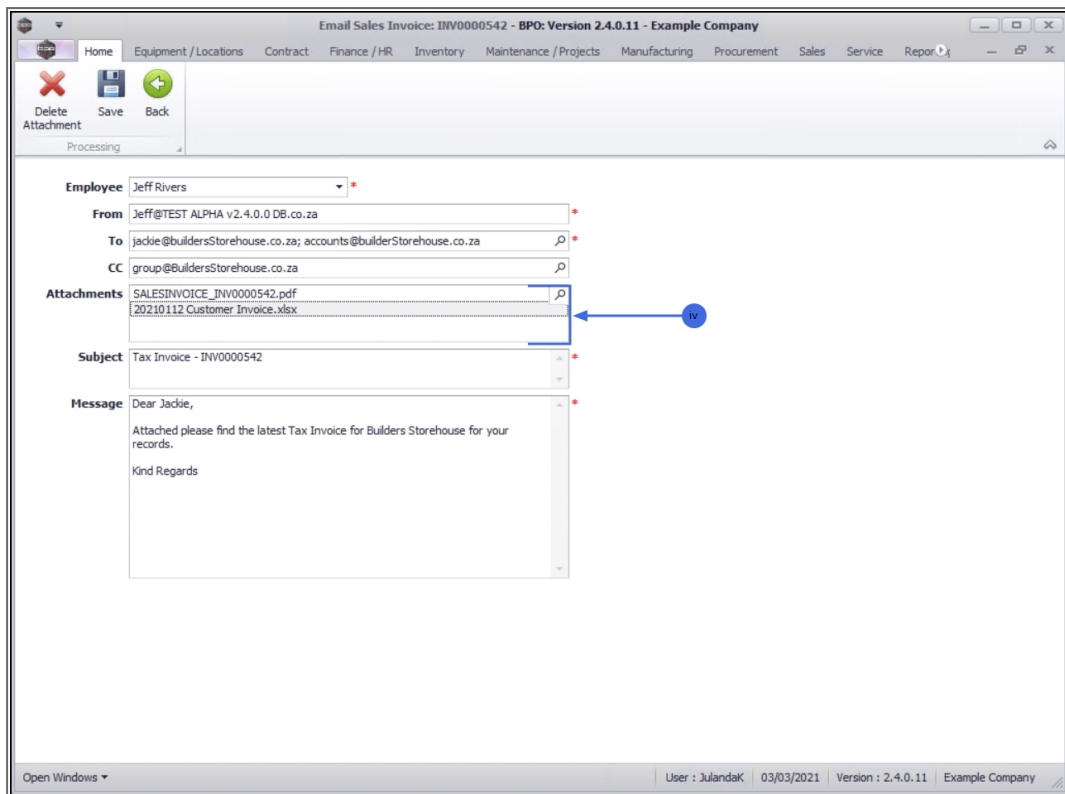


Note: If there are outstanding parts that have not been issued, a Back Order report will also be attached.

- i. To add an additional attachment, click on the **search** button in the **Attachments** field to display the **Select File** window.
- ii. You can **browse** to find the file location of the document you wish to attach, then **click** on the file to select it.
- iii. Once you have selected the file, click on **Open**.



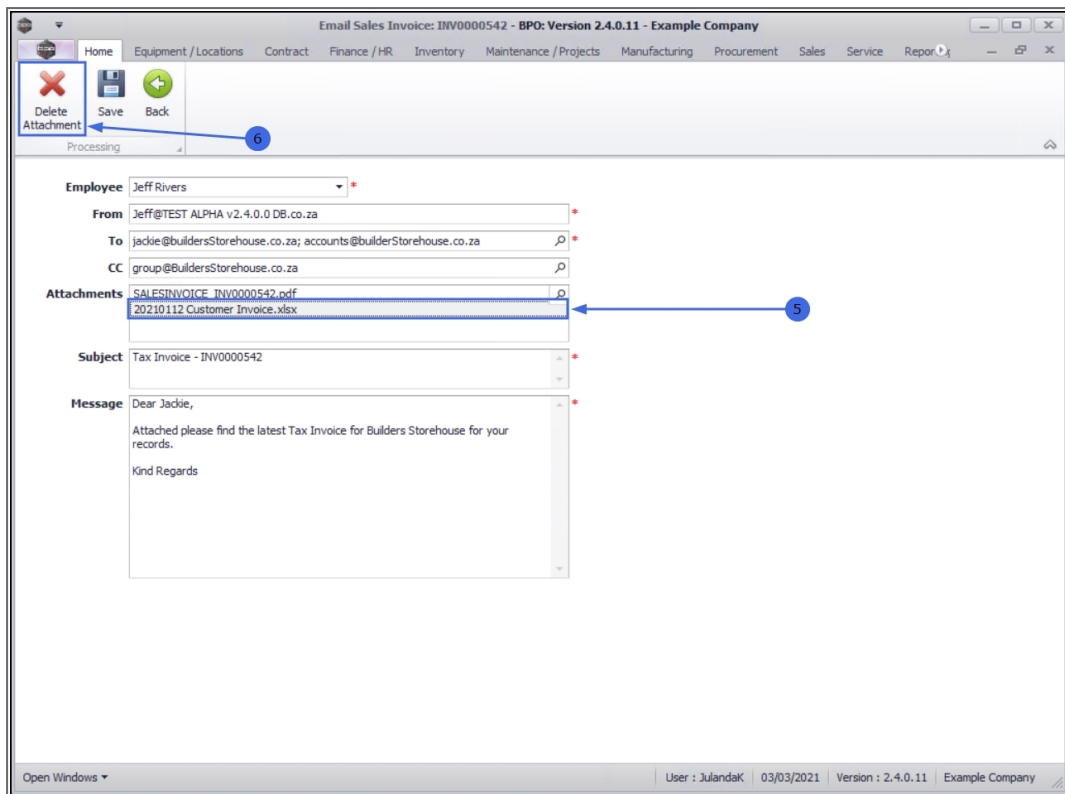
- iv. The document has been added as an **Attachment**.



Delete Attachment

You may choose to delete an obsolete or incorrectly attached document.

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

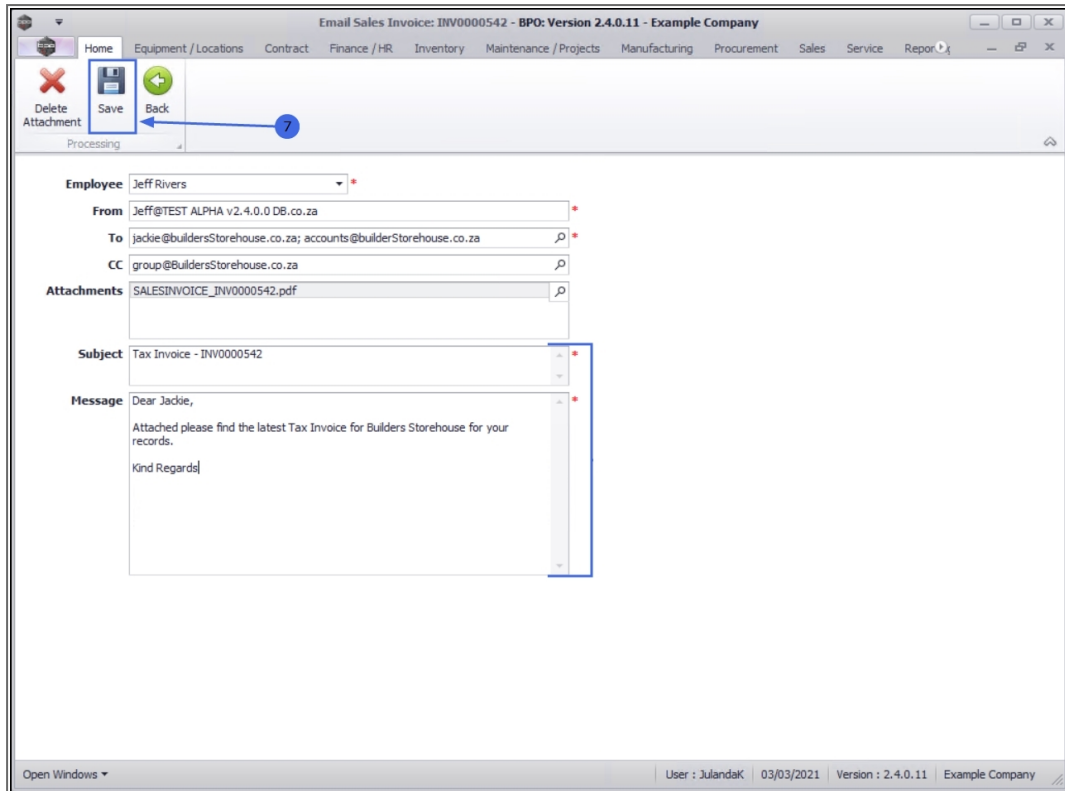


EMAIL SUBJECT AND MESSAGE

- **Subject:** Type the email subject line. Remember that this will be the first thing relating to your email that the Customer sees.
- **Message:** Type an email text message.

SAVE EMAIL

14. Once you have completed your email, click **Save**.



15. You will return to the **Sales Invoices** listing screen.

16. The Sales Invoice will now be available in the **Printed** Status list.

- Click on the down **arrow** to change the **Status** to **Printed**.

InvoiceNo	CustomerCode	CustomerName	DeptName	InvoiceDescription	InvoiceValue	InvoiceStat...	Currency	CrNotes
INV0000544	HOP001	Hope Works (Pty) Ltd		PO: HW250	963.17	Printed	ZAR	
INV0000543	BUI0001	Builders Storehouse			575.00	Printed	ZAR	
INV0000542	BUI0001	Builders Storehouse		PO: 540	0.00	Printed	ZAR	
INV0000541	PIN0001	Pink Shoes		PO: 23676	241,500.00	Printed	ZAR	
INV0000536	YES001	Young Electric		teting 123	2,415.00	Printed	ZAR	CN0000144 (N)
INV0000535	HOP001	Hope Works (Pty) Ltd		test test	4,025.00	Printed	ZAR	CN0000143 (N)
INV0000534	PAN001	Panda Copiers		test	190.00	Printed	USD	CN0000145 (N)
INV0000533	PIN0001	Pink Shoes		Tech	1,213.71	Printed	ZAR	
INV0000532	PIN0001	Pink Shoes		test	0.00	Printed	ZAR	
INV0000531	PIN0001	Pink Shoes		test	0.00	Printed	ZAR	
INV0000530	HOP001	Hope Works (Pty) Ltd		test	74.89	Printed	ZAR	
INV0000529	HOP001	Hope Works (Pty) Ltd		test	0.00	Printed	ZAR	
INV0000528	PIN0001	Pink Shoes		Swap out Invoice	5,175.00	Printed	ZAR	
INV0000526	PIN0001	Pink Shoes		new copier	241,895.60	Printed	ZAR	
INV0000525	BIG0001	Big Bargains		Test email	602.60	Printed	ZAR	
INV0000524	HOP001	Hope Works (Pty) Ltd		test	14,651.95	Printed	ZAR	CN0000139 (P)
INV0000523	HOP001	Hope Works (Pty) Ltd		test	14,674.90	Printed	ZAR	CN0000138 (P)
INV0000522	TIA001	Titan Group		1234	575.00	Printed	ZAR	
INV0000521	GET001	Get Up and Go		test	621.00	Printed	ZAR	
INV0000520	GET001	Get Up and Go		1234	1,104.00	Printed	ZAR	
INV0000519	GET001	Get Up and Go		1234	993.60	Printed	ZAR	
INV0000518	NEW 102	New Customer		test	621.00	Printed	ZAR	

Related Topics

- [Invoices - Print Sales Invoice](#)
- [Quotes - Convert to Sales Order](#)
- [Invoices - Send Invoices To Print Queue](#)

MNU.061.046

