

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

SERVICE

CALLS - INVOICE A CALL

Note that there are changes to the Call Centre screens due to the Call Centre Performance Enhancements rolled out in part of the Extended Call Centre - Version Compatibility¹. The functionality that is available to you may differ depending on the Call Centre mode configured and your user rights. For more information related to this, refer to the <u>Call Centre Mode</u> notes.

When Call Invoices are raised, remember the following:

Parts, Labour, Sub-Contracts and Expenses must be logged against the call **before** invoicing. These items **cannot** be added to the invoice.

Internal Services, Travel and Warranties **can** be added to the invoice.

The invoice must be **printed** in order for the transaction to post to Pastel.

The first time an invoice is printed, it will state: **Tax Invoice**. Each time thereafter, it will state **Copy-Tax Invoice**.

If you need to re-print an original Tax Invoice due to a network connection issue, etc. then you will need to use the <u>Print Queue Reprint</u> functionality.

Ribbon Select Service > Calls



¹BPO2 v2.5.1.3 or higher



• The **Call Listing** screen will be displayed.

Horre Equipment / Li							Listing - BPO: Version 2.5.1.4 - Example Company							- 4
Home Equipment / Li	ocations Contract	Finance / HR Invent	ory Maintenance	/ Projects Manufa	turing Procureme	nt Sales	Service Reporting Utilities							-
Edit Refresh My Call	s 🗆 🗮 Workspac Save Pite	xes = 🚜 Assign 🔍	se Complete Ho		Print Report	s								
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rmation	E CN0001003	Young Bectric	13/12/2022	Amaiting Acceptance	Arin Milton	10:09:10	Test account balances	CR	Change Request			107		
Durban	CN0001002	Samanthas Diner	12/12/2022	Awaiting Acceptance		16:18:30	Test call for account balances manual.	DR	Select Call Type			19-12/1202		
New York	E CN0001001	Young Electric	29/11/2022	UnAssigned		11:29:19	Order the same part twice receive with different batch num		Change Request			sin123		1
In Progress	E CN0000995	Hope Works (Pty) Ltd	31/10/2022	UnAssigned		11:01:11	ForRentalContract	NDR	New Deal Rental				BPO2 TEST 1	
Hold Pending	E CN0000992	Top Vehicle Hire	25/10/2022	Awaiting Acceptance	Daniel Balgowen	14:09:17	Loan machine for temporary high volume printing requirement		Service			TOP 12340LD		
Complete	E CN0000991	Apple Juice Inc	24/10/2022	UnAssigned		16:38:15	Contract Closure - C00000054	DR	Select Call Type					
O Al	E CN0000989	Derton / Technologies	13/06/2022	UnAssigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		
Pretoria	E CN0000988	Young Electric	03/06/2022	UnAssigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	sin123		
New	E CN0000987	Young Electric	06/06/2022	UnAssigned		05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			sin123		
In Progress	CN0000986	Young Electric	07/06/2022	UnAssigned		05:00:00	Call logged 3 days ago for elapse time checks	DR	Select Cal Type			sin123		
Hold	E CN0000985	Hope Works (Pty) Ltd	10/06/2022	UnAssigned		16:09:13	Test future call - for elapsed time	UPG	Upgrade			20-98765		
Pending	E CN0000984	Hope Works (Pty) Ltd	08/06/2022	UnAssigned		05:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT5000000		
Complete	E CN0000983	Hope Works (Pty) Ltd	09/06/2022	UnAssigned		05:08:31	Test elapsed time 2 - day prior	TEST	Testing			5IN32413546		
Al Cape Town	E CN0000982	Young Electric	10/06/2022	UnAssigned		05:00:35	Test elapsed hours 1	TEST	Testing			sin123		
Cape Town One New	E CN0000976	Young Electric	19/11/2019	Awaiting Acceptance	Bianca Du Tolt	11:24:39	Test with site manager email entered	ADM	Administration			107		
In Progress	E CN0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	16:30:20	test another call email	ADM	Administration			095011015		
() Hold	E CN0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:57:00	Test new call for email description in body	CR	Change Request			095011015		
Pending	E CN0000971	Westwood Dynamic	29/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	94	Scheduled Maintenance				Checkers Centre - Hilcrest	
Complete	EE CN0000970	Westwood Dynamic	22/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
🖸 Al	E CN0000969	Hope Works (Pty) Ltd	16/11/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
5 tioemfontein	E CN0000968	Green Tea Supples	16/11/2019	UnAssigned		08:00:00	2MS - 2 month service	54	Scheduled Maintenance			NEW 1234		
 New 	E CN0000967	Westwood Dynamic	15/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hildrest	
In Progress	E CN0000966	Westwood Dynamic	08/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	94	Scheduled Maintenance				Checkers Centre - Hilcrest	
Hold Pending	EE CN0000965	Westwood Dynamic	01/11/2019	UnAssigned		08:00:00	BathSinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
Pending Complete	E CN0000964	Hack PC - IT Shop	26/10/2019	UnAssigned		03:00:00	2M5 - 2 month service	54	Scheduled Maintenance			147807		
Q Al	E CN0000963	Westwood Dynamic	25/10/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
•	E CN0000962	Hope Works (Pty) Ltd	19/10/2019	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		
	E CN0000961	Hope Works (Pty) Ltd	18/10/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
	EE CN0000960	Westwood Dynamic	18/10/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000959	Westwood Dynamic	11/10/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000958	Westwood Dynamic	04/10/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000957	Westwood Dynamic	27/09/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000956	Westwood Dynamic	20/09/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	5M	Scheduled Maintenance				Checkers Centre - Hildrest	
	EE CN0000955	Hope Works (Pty) Ltd	18/09/2019	UnAssigned		08:00:00	Tier - Commercial Tier Test	DIST	Installation				Forest Hills Centre	
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- The Calls are listed by **Site** and will display calls for the first Site listed.
- Click on the relevant **Site** for the calls you wish to view.

Home Equipment / Lo Edt Refresh My Calls	Save Lay	sut 🚜 My Call 🥰	3 🚱 🖻	4 Pending Release	1 e 1		Service Reporting Utilities							
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ormation	E CN0001003	Young Bectric		Awaiting Acceptance	Arin Milton	10:09:10	Test account balances	CR	Change Request			107		
Durban	E CN0001002	Samanthas Diner	12/12/2022	Awaiting Acceptance		16:18:30	Test call for account balances manual.	DR	Select Call Type			19-12/1202		
New	E CN0001001	Young Bectric	29/11/2022			11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			sin123		
In Progress	E CN0000995	Hope Works (Pty) Ltd		UnAssigned			For8 entalContract	NDR	New Deal Rental				BPO2 TEST 1	
O Hold	E CN0000992	Top Vehicle Hire		Amaiting Acceptance	Daniel Balcowen	14:09:17	Loan machine for temporary high volume printing requirement		Service			TOP 12340LD		
Pending	E CN0000991	Apple Juice Inc	24/10/2022			16:38:15		DR	Select Cal Type					
Complete	E CN0000989	Derton / Technologies		UnAssigned			Call for Monday elapse hours check		Testing					
Pretoria	E CN0000988	Young Electric		UnAssigned		05:00:00	Call logged S days ago for time elapsed checks	CR	Change Request	CONF	Confouration	sin123		
O New	E CN0000987	Young Electric	06/06/2022			05:00:00	Call logged 3 days ago for elapse time checks	UPG	Upprade		Comparation	sin123		
In Progress	E CN0000985	Young Electric	07/06/2022		_	05:00:00	Call logged 3 days ago for elapse time checks	DR	Select Cal Type			sin123		-
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Pending	E CN0000984	Hope Works (Pty) Ltd		UnAssigned		05:10:00	Test elased hours - 2 days prior	TEST	Testing			AT5000000		
O Complete	E CN0000983	Hope Works (Pty) Ltd Hope Works (Pty) Ltd				05:08:31	Test elapsed hours - 2 days prior Test elapsed time 2 - day prior	TEST				A1 9000000		
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Cape Town	E CN0000982	Young Electric		UnAssigned		06:00:35	Test elapsed hours 1	TEST	Testing			sin 123		
New	■ CN0000976	Young Electric	19/11/2019			11:24:39	Test with site manager email entered	ADM	Administration			107		
In Progress	E CN0000974	Hope Works (Pty) Ltd	18/11/2019	Amaiting Acceptance		16:30:20	test another call email	ADM	Administration			095010015		
Hold	E CN0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:57:00	Test new call for email description in body	CR	Change Request			095011015		
Pending	E CN0000971	Westwood Dynamic	29/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
Complete	EE CN0000970	Westwood Dynamic	22/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
O AI	E CN0000969	Hope Works (Pty) Ltd	16/11/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
Iloenfontein	E CN0000968	Green Tea Supplies	16/11/2019	UnAssigned		03:00:00	2MS - 2 month service	514	Scheduled Maintenance			NEW 1234		
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Pending	EE CN0000965	Westwood Dynamic	01/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
C Complete	E CN0000964	Hack PC - IT Shop	26/10/2019	UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		
Q AI	E CN0000963	Westwood Dynamic	25/10/2019	UnAssigned		03:00:00	SathSinMaint - Bathroom Bin Maintenance	524	Scheduled Maintenance				Checkers Centre - Hilcrest	
-	E CN0000962	Hope Works (Pty) Ltd	19/10/2019	UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		
	E CN0000961	Hope Works (Pty) Ltd	18/10/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	DIST.	Installation				Forest Hills Centre	
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• Select the **Call** you wish to work with.



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Durban	CN0001002	Samanthas Diner			Mary Thompson		Test call for account balances manual.	DR	Select Call Type					
 In Progress 	E CN0001001	Young Bectric	29/11/2022	UnAssigned		11:29:19	Order the same part twice receive with different batch num	CR	Change Request			sin123		
() Hold	E CN0000995	Hope Works (Pty) Ltd	31/10/2022	UnAssigned		11:01:11	ForRentalContract	NDR	New Deal Rental				BPO2 TEST 1	
O Pending 1		Top Vehicle Hire	25/10/2022	Awaiting Acceptance	Daniel Balgowen	14:09:17	Loan machine for temporary high volume printing requirement	t SERV	Service			TOP 12340LD		
C Complete	E CN0000991					16:38:15		DR						
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New	E CN0000987	Young Electric	06/06/2022	UnAssigned		05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			sin 123		
In Progress	CN0000986					05:00:00	Call logged 3 days ago for elapse time checks	DR	Select Call Type			sin123		
() Hold	EE CN0000985	Hope Works (Pty) Ltd	10/06/2022	UnAssigned		16:09:13	Test future call - for elapsed time	LIPG	Upgrade			20-98765		
O Pending	E CN0000984	Hope Works (Pty) Ltd	08/06/2022	UnAssigned		05:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT5000000		
Complete	E CN0000983	Hope Works (Pty) Ltd	09/06/2022	UnAssigned		05:08:31	Test elapsed time 2 - day prior	TEST	Testing			SIN32413546		
Cape Town	E CN0000982		10/06/2022			05:00:35	Test elapsed hours 1	TEST	Testing			sin123		
O New	CN0000976 CN00000976 CN0000976 CN000097 CN00000976 CN00000976 CN0000976 CN00000976 CN00	Young Electric	19/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:39	Test with site manager email entered	ADM	Administration			107		
In Progress	E CN0000974	Hope Works (Pty) Ltd	18/11/2019		Bianca Du Toit		test another call email	ADM	Administration					
() Hold	E CN0000972	Hope Works (Pty) Ltd		Awaiting Acceptance	Bianca Du Toit	15:57:00	Test new call for email description in body	CR	Change Request			095011015.		
Pending	E CN0000971	Westwood Dynamic	29/11/2019	UnAssigned		03:00:00	SathSinNaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
 Complete 	EE CN0000970	Westwood Dynamic	22/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
O Al	E CN0000969	Hope Works (Pty) Ltd	16/11/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
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In Progress	E (N0000966	Westwood Dynamic		UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	94	Scheduled Maintenance				Checkers Centre - Hilcrest	
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	E CN0000961	Hope Works (Pty) Ltd		UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation			10-30200	Forest Hills Centre	
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• Click on the **Edit** button.

Horre Equipment /						Call	Listing - BPO: Version 2.5.1.4 - Example Company							
Home Equipment)		Finance / HR Invento	ory Maintenance	/ Projects Manufac	turing Procureme	nt Sales	Service Reporting Utilities							
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Durban	E CN0001002	Samanthas Diner		Awaiting Acceptance		16:18:30	Test call for account balances manual.	DR	Select Cal Type			19-12/1202		-
New	E CN0001001	Young Electric	29/11/2022		Hary monpoort	11:29:19	Order the same part twice receive with different batch num.		Change Request			19-12/1202 11123		
 In Progress 	E CN0000996	Hope Works (Ptv) Ltd					ForRentalContract	NDR	New Deal Rental			BILLES	BPO2 TEST 1	
🕑 Hold	E CN0000998	Top Vehicle Hire		Awaiting Acceptance	Desciel Releases		Loan machine for temporary high volume printing requirement		Service			TOP 12340LD		
Pending	E CN0000992	Apple Juice Inc	23/10/2022		varie vagowen	14:09:17	Contract Closure - C00000054	DR	Select Call Type			10-1254000		
Complete	E CN0000991	Apple Juce Inc Derton / Technologies				09:00:00	Contract Closure - CO000034 Call for Monday elapse hours check	TEST	Testing					
All Pretoria	E CN0000988	Young Electric	13/06/2022			05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Confouration	z020-2222 sin123		
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In Progress	E CN0000987	Young Electric	06/06/2022			05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			sin123		
() Hold	■ CN0000986	Young Electric	07/06/2022			05:00:00	Call logged 3 days ago for elapse time checks	DR	Select Call Type			sin123		
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O AI	E CN0000983	Hope Works (Pty) Ltd	09/06/2022			05:03:31	Test elapsed time 2 - day prior	TEST	Testing			SIN32413546		
Cape Town	E CN0000982	Young Electric		UnAssigned		06:00:35	Test elapsed hours 1	TEST	Testing			sin123		
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In Progress Hold	E CN0000966	Westwood Dynamic	08/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hilcrest	
Pending	EE CN0000965	Westwood Dynamic	01/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
Complete	E CN0000964	Hack PC - IT Shop	26/10/2019	UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		
Q AI	E CN0000963	Westwood Dynamic	25/10/2019			03:00:00	BathBinMaint - Bathroom Bin Maintenance	524	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000962	Hope Works (Pty) Ltd	19/10/2019	UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		
	E CN0000961	Hope Works (Pty) Ltd		UnAssigned		03:00:00	Tier - Commercial Tier Test	DIST	Installation				Forest Hills Centre	
	E CN0000960	Westwood Dynamic	18/10/2019			03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000959	Westwood Dynamic	11/10/2019			03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000958	Westwood Dynamic	04/10/2019			03:00:00	BathBinNaint - Bathroom Bin Maintenance	54	Scheduled Meintenance				Checkers Centre - Hilcrest	
	E CN0000957	Westwood Dynamic	27/09/2019			03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000956	Westwood Dynamic	20/09/2019			03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000955	Hope Works (Pty) Ltd		UnAssigned		03:00:00	Tier - Commercial Tier Test	DIST	Installation				Forest Hils Centre	
	E CN0000955	Rope Vional (Pty) Los Green Tea Supples	17/09/2019			08:00:00	245 - 2 month service	9M	Scheduled Maintenance			NEW 1234	Contracting Carlore	
	E CN0000954	Weeks and Dispares				03:00:00	2MS - 2 Month Service	-	Scheduled Maintenance			100 120 ⁴	Charless Cashes, 107-read	
	Count: 386													
													5/2023 Version : 2.5.1.4	

- The **Call maintenance : Call ref. -** [call number] screen will be displayed.
- Click on the **Invoices** tile.



Home Equ	ipment / Locations	Contra	ct Fina	nce / HR	Inventory	Maintena	nce / Projects	Manufa	cturing	Procurement	Sales	Service	Reporting	Utilities	-	8
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- The Sales Invoices for Call [call number] screen will be displayed.
- Any invoices that have already been issued against the work order, will display.

ADD INVOICE

• Click on Add.

Short cut key: Right click to display the All groups menu list. Click on Add.



-			Sales Invoices	for Call CN0005305 - B	PO: Version 2.	5.0.8 - Examp	le Company v2.	5.0.8				x
Home Equip	ment / Locations	Contract	Finance / HR In	ventory Maintenance	/ Projects /	Manufacturing	Procurement	Sales	Service	Reporting Utili	ties — d	7 X
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Enter text to search 🔎	InvoiceNo	CustomerCode	CustomerName	InvoiceDescription	InvoiceValue	Currency	ExchangeRate	TaxRate	InvoiceDate	InvoiceStatus	SalesmanEmplNo	Sale
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Issues	1 INV0000582	BIG0001	Big Bargains	SO004	893.5	5 ZAR	1.00	15.00	17/05/2022	N	KES001	Jula
	4											

- " The Add new Customer Invoice screen will display." on page 2
- Complete the Sales Invoice Header and the Financial Header information.
- Confirm the **Billing and Shipping Addresses**, of these fields were not populated when you entered the Header information.



- Parts, Labour, Sub-Contracts and Expenses must be logged against the call before invoicing. These items cannot be added to the invoice.
- - Internal Services, Travel and Warranties **can** be added to the invoice.



۵	Ŧ				Add new Cust	omer Invo	Dice - BPO: Version	2.5.0.8 -	Exa	ample Com	pany v	2.5.0.8					-		x
	Home	Equipment / Loc	ations C	ontract Finan	ce/HR Inve	ntory I	Maintenance / Project	ts Ma	nufa	acturing	Procure	ement	Sales	Service	Reporting	Utilities	-	8	x
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	Salesman	Julanda Kessler		•					-	Shipping a		is		_					
Billi	ng Customer	Big Bargains		• م	Billing Contact	Tarryn Sn	ow CUSTOMER CONT	ACT ,0 *		29 Dune A New Town			<u>^</u>						
Invo	ice Currency	South African Rang	d	• E	xchange Rate			1 🗘 *		Durban			Ŧ						
	Tax Rate	15.00 -		15 🗘		Suppr	ess Line Detail on	Print	1	Addresses	Relat	ted Refere	nces						
Su	ppressOnPrint	ItemType	ItemCode	ItemDescription	InvoiceLineDe	scription	WarehouseName	BatchSe	rial	No Quanti	ty U	InitCost	Markup	Discount	UnitSellingPric	e Base	CcyPrice	Tax	Rate
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- Click on the Related References tab to enter the reference information for the Customer Invoice.
- The Call Reference has been auto populated with the Call Ref number selected.
- Edit the Items to be Invoiced
 - **Drag** and **drop** items lines to set the order you wish the items to be displayed on the sales invoice.
 - This order will be pulled into the printed invoice when generated.



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- Click on the Comments text box to type in a comment related to the Invoice.
- Click on **Save** to save the Customer Invoice details.

For a detailed handling of this topic refer to Invoices - Create Sales Invoice (OTC)



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INVOICE LISTING

• The Sales Invoices for Call screen will be updated with the new invoice you have created.

-	Home	Equipr	nent /	Locations	Contract	Finance / HR	Inventory	Maintenance	/ Projects Ma	nufacturing	Procurement	Sales	Service F	Reporting Util	ties — d	8)
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EDIT INVOICE

- From the Sales Invoices for Call [call number] screen,
- Click on the **row** of the invoice you wish to edit.
- Click on **Edit**.

Short cut key:Right click to display the Process All groups menu list. Click on Edit.

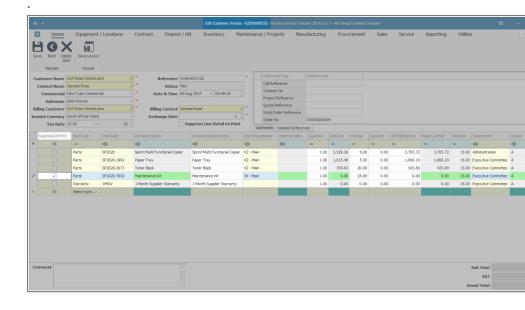
=						Sales	Invoices	for Call CN0	005305 - BP	O: Version 2.5.	.0.8 - Examp	ple Company va	.5.0.8				X
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- The Edit Customer Invoice [invoice number] screen will display
- Make the required changes to the Heading Information, Addresses or Related References tabs.
- Make the required changes to the Invoice Item frame.
 - To **Add** a new Invoice item, click on the **Select type** text box of the first available item line.
 - To **remove** an item, click on the **row** of the item you wish to remove and click on **Delete Item**.



•

- **Drag** and **drop** items lines to set the order you wish the items to be displayed on the sales invoice.
 - This order will be pulled into the printed invoice when generated.



• Click on Save.

For a detailed handling of this topic refer to Invoices - Edit Sales Invoice



ф. т .			Edit	Customer Invo	oice - INVO	0000583 - BPO: V	ersion 2.5	.0.8	- Exam	ple Con	npany v2.5	.0.8				-		х
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Customer Name	Big Bargains		• م	Reference	B6004			•	Billing	addres	s							
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Salesman	Julanda Kessler		•						Shippi	-	ess							
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You will return to the updated Sales Invoices for Call listing screen.

COMMENT AND REFERENCE

You will be able to <u>add</u> or <u>view</u> the Comment and Reference information for the Customer Invoice from the Work Order Listing Screen.

- From the Sales Invoices for Customer [customer code] screen,
- Select the **row** of the Invoice you wish to add or view the Comment and Reference information for.
- Click on **Comment and Reference**.

Short cut key:Right click to display the Process menu list. Click on Comment and Reference.



ADDITIONAL INVOICE ITEMS

SAVE INVOICE

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You will return to the **Sales Invoices for Call [invoice number]** screen where you can view the newly raised **invoice**.

PRINT INVOICE

- Click on the **row selector** in front of the **new invoice** that you wish to **print**.
- Click on Print.

Help v2024.5.0.7/1.0 - Pg 13 - Printed: 21/08/2024



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100			Ľ	2W000037	WE5001	W	estwood	Dynamic	Additional II	ems for Service	572.64	ZAR	1.00	14.00	20 Dec 2017	N	Sarah Mider	٨	

- A Select the option as desired screen will pop up.
- Click on **Print Invoice**.
- Click on Accept.



	٠					Sales Invo	ices for Call	CN0000505 - I	SPO: Version	2.1.0.43 - Ex	ample Compan	ļ			-		Х
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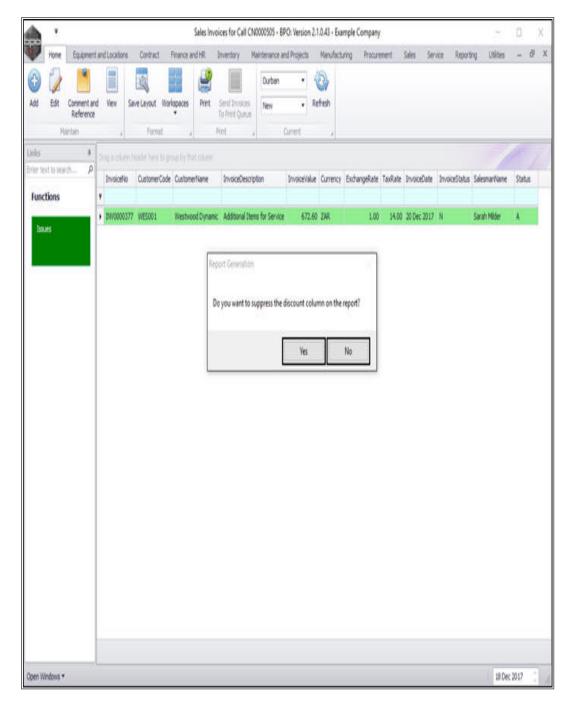
SUPPRESS THE DISCOUNT COLUMN ON THE REPORT

- A **Report Generation** message box will pop up, asking;
 - Do you want to suppress the discount column on the report?

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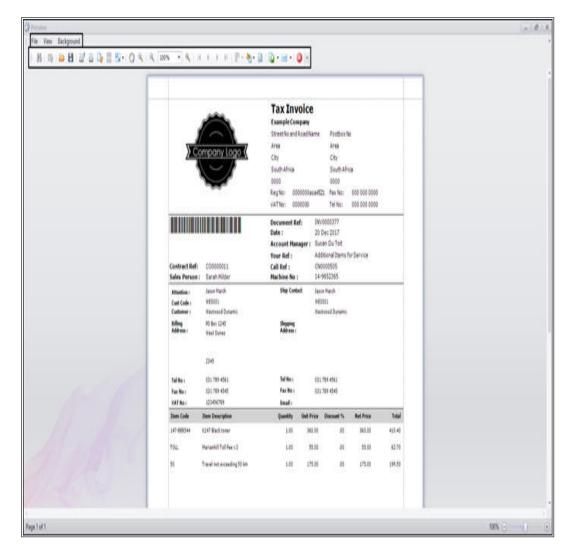


- Select Yes to hide the discount on the printed invoice.
- Select No to show the discount on the printed invoice.





- The Report Preview screen will be displayed.
- From here you can View, Print, Export or Email the Invoice.
- **Close** the Report Preview screen when done.



EMAIL INVOICE

- In the Select the option as desired screen,
- Click on Email Invoice.
- Click on Accept.



	*					Sales Invo	ices for Call CN	0000505 - B	PO: Version	2.1.0.43 - Ex	ample Compan	¢.,				Ū,	Х
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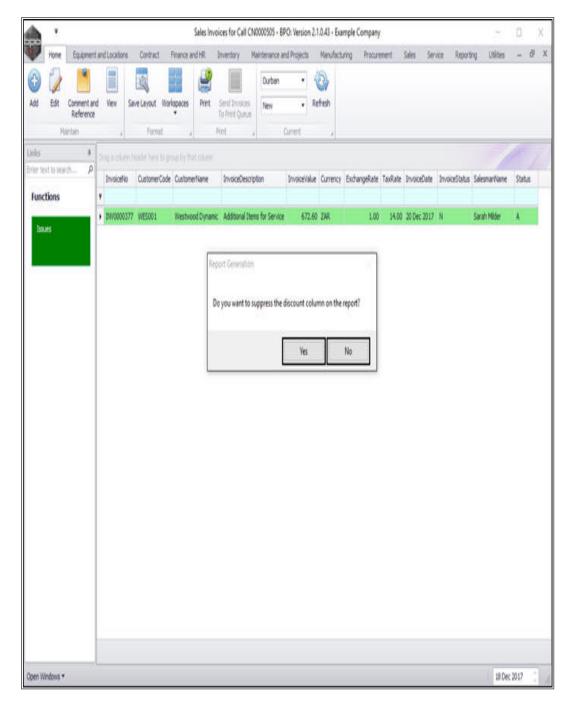
SUPPRESS THE DISCOUNT COLUMN ON THE REPORT

- A Report Generation message box will pop up, asking;
 - Do you want to suppress the discount column on the report?

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- Select Yes to hide the discount on the printed invoice.
- Select No to show the discount on the printed invoice.





The Email Sales Invoice [invoice number] screen will be displayed.

- **Employee:** Will be populated by the employee linked to the associated login. Click on the drop-down arrow and select an alternative employee from the menu if required.
- **From:** The selected employee's email address will pull through here. If not populated, you can manually type in the email address.
- To: This will automatically populate with the sales invoice contact person's email address. Click on the search button to link more contacts from this customer. You also have the ability to manually type in an email address. This message will be sent from the server, so if you want to have email history for this, then add your email address here.
- Attachments: The sales invoice PDF will be attached to the email. If there are outstanding parts that have not been issued, a Back Order report will also be attached. You can link additional attachments by clicking on the search button and using the Select File screen to select a file to attach.
- **Subject:** Type in an email subject.
- Message: Type in an email message.



		Email	Sales Invoice:	INV0000377 - BPO: Version 2	1.0.43 - Example (Company					۵	
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• When you have finished adding details to the Email Sales Invoice page, click on **Save**.



1		Email	Sales Invoice: I	NV0000377 - BPO: Version 2	1.0.43 - Example (Company				- 22	۵	
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From	susan@email.coza											
To	contact@email.coza			ρ								
cc	contact@email.coza			ρ								
Attachments	SALESDWOLCE_DW0000377.pdf			P								
Enhiart	Service Invoice - with additional ib											
Subject	Service swore - with appropriatio	es.		1								
Hessage	Please find attached the sales invi	oice for the service request	ted.	1								
				8								

• Your email will be sent from the server and you will return to the **Call Listing** screen.

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