

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 [Call Centre Mode](#) 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.

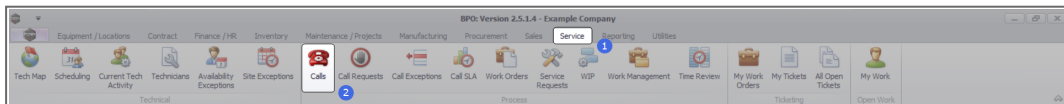
The invoice must be **printed** in order for the transaction to post to Pastel.

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 [Print Queue Reprint](#) functionality.

Ribbon Select **Service > Calls**



¹BPO2 v2.5.1.3 or higher

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

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocation/Subject	Priority
IB CH001003	Young Electric	13/12/2022	Awaiting Acceptance	Ann Milan	09:09:19	Test account balances	CR	Change Request			107		3
IB CH001002	Sawmills Drive	12/12/2022	Awaiting Acceptance	Mary Thompson	09:18:30	Test call for account balances manual	SR	Select Call Type			19-121202		3
IB CH001001	Young Electric	20/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			107		3
IB CH000996	Hope Works Pty Ltd	21/10/2022	Unassigned		11:01:11	ForBattContract	NCR	New Deal Rental			107	BP02 TEST 1	2
IB CH000992	Top Vehicle Hire	23/10/2022	Awaiting Acceptance	Daniel Balgoven	14:09:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP1234567		2
IB CH000991	Adels Bats Inc	24/10/2022	Unassigned		09:38:15	Contract Closure - C0000054	SR	Select Call Type			107		3
IB CH000989	Derby Technologies	13/06/2022	Unassigned		09:00:00	Call for Monday elapsed hours check	TEST	Testing			2025-2222		3
IB CH000988	Young Electric	03/06/2022	Unassigned		06:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	107		3
IB CH000987	Young Electric	06/06/2022	Unassigned		06:00:00	Call logged 4 days ago for time elapsed checks	LPG	Upgrade			107		3
IB CH000986	Young Electric	07/06/2022	Unassigned		06:00:00	Call logged 3 days ago for time elapsed checks	SR	Select Call Type			107		3
IB CH000985	Hope Works Pty Ltd	06/06/2022	Unassigned		06:00:00	Test future call - for elapsed time	LPG	Upgrade			20-98765		3
IB CH000984	Hope Works Pty Ltd	06/06/2022	Unassigned		06:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT5000000		3
IB CH000983	Hope Works Pty Ltd	06/06/2022	Unassigned		06:08:31	Test elapsed time 2 - day prior	TEST	Testing			SN1234567		3
IB CH000982	Young Electric	06/06/2022	Unassigned		06:00:00	Test elapsed hours 1	TEST	Testing			107		3
IB CH000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	13:24:59	Test with site manager email entered	ACM	Administration			107		3
IB CH000974	Hope Works Pty Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	06:30:20	test another call email	ACM	Administration			095011015		3
IB CH000972	Hope Works Pty Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:37:00	Test new call for email description in body	CR	Change Request			095011015	Checkers Centre - Hiloast	3
IB CH000971	Westwood Dynamic	20/11/2019	Unassigned		08:00:00	SubBattMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hiloast	2
IB CH000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	SubBattMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hiloast	2
IB CH000969	Hope Works Pty Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INBT	Installation				Forest Hills Centre	2
IB CH000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
IB CH000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	SubBattMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hiloast	2
IB CH000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	SubBattMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hiloast	2
IB CH000965	Westwood Dynamic	04/11/2019	Unassigned		08:00:00	SubBattMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hiloast	2
IB CH000964	Hoek PC - IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
IB CH000963	Westwood Dynamic	21/10/2019	Unassigned		08:00:00	SubBattMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hiloast	2
IB CH000962	Hope Works Pty Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
IB CH000961	Hope Works Pty Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INBT	Installation				Forest Hills Centre	2
IB CH000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	SubBattMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hiloast	2
IB CH000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	SubBattMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hiloast	2
IB CH000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	SubBattMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hiloast	2
IB CH000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	SubBattMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hiloast	2
IB CH000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	SubBattMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hiloast	2
IB CH000955	Hope Works Pty Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INBT	Installation				Forest Hills Centre	2
IB CH000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

- 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.

- Select the **Call** you wish to work with.

Call Listing - BPO Version 2.5.1.4 - Example Company

CallRef	CustomerName	CallDate	CallTime	Description	CallType	CallDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BI CH0001003	Young Electric	12/22/2022	12:59:10	Test account balance	CR	Change Request			107		3
BI CH0001002	Seaboard Drive	12/22/2022	06:38:20	Test call for account balance manual	DR	Select Call Type			BI-12/202		3
BI CH0001001	Young Electric	20/11/2022	11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			an123		3
BI CH0000999	Hope Works (Pty) Ltd	20/08/2022	14:58:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP1234567		3
BI CH0000991	Aplic. Ltda Inc	24/02/2022	05:36:15	Contact Closure - C0000005	DR	Select Call Type					2
BI CH0000989	Derton / Technologies	13/04/2022	09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
BI CH0000988	Young Electric	02/04/2022	06:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	an123		3
BI CH0000987	Young Electric	06/04/2022	06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123		3
BI CH0000986	Young Electric	07/04/2022	06:00:00	Call logged 3 days ago for elapse time checks	DR	Select Call Type			an123		3
BI CH0000985	Hope Works (Pty) Ltd	18/04/2022	05:09:13	Test future call - for elapsed time	LPG	Upgrade			20-98765		3
BI CH0000984	Hope Works (Pty) Ltd	08/04/2022	06:00:00	Test elapsed hours - 2 day prior	TEST	Testing			AT0000000		3
BI CH0000983	Hope Works (Pty) Ltd	09/04/2022	06:00:33	Test elapsed time 2 - day prior	TEST	Testing			SN234123456		3
BI CH0000982	Young Electric	18/04/2022	06:00:35	Test elapsed hours 1	TEST	Testing			an123		3
BI CH0000976	Young Electric	19/11/2019	13:24:29	Test with site manager email entered	ADM	Administration			107		3
BI CH0000974	Hope Works (Pty) Ltd	18/11/2019	06:30:26	Test another call email	ADM	Administration			059319151		3
BI CH0000972	Hope Works (Pty) Ltd	18/11/2019	15:57:00	Test new call for email description in body	CR	Change Request			059319151		3
BI CH0000971	Westwood Dynamic	29/11/2019	08:00:00	SubMntMnt - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BI CH0000970	Westwood Dynamic	22/11/2019	08:00:00	SubMntMnt - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BI CH0000969	Hope Works (Pty) Ltd	16/11/2019	08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
BI CH0000968	Green Tea Supplies	16/11/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BI CH0000967	Westwood Dynamic	15/11/2019	08:00:00	SubMntMnt - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BI CH0000966	Westwood Dynamic	08/11/2019	08:00:00	SubMntMnt - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BI CH0000965	Westwood Dynamic	02/11/2019	08:00:00	SubMntMnt - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BI CH0000964	HOCK PC - IT Shop	26/10/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BI CH0000963	Westwood Dynamic	25/10/2019	08:00:00	SubMntMnt - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BI CH0000962	Hope Works (Pty) Ltd	19/10/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			19-30300		2
BI CH0000961	Hope Works (Pty) Ltd	18/10/2019	08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
BI CH0000960	Westwood Dynamic	18/10/2019	08:00:00	SubMntMnt - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BI CH0000959	Westwood Dynamic	11/10/2019	08:00:00	SubMntMnt - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BI CH0000958	Westwood Dynamic	04/10/2019	08:00:00	SubMntMnt - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BI CH0000957	Westwood Dynamic	27/09/2019	08:00:00	SubMntMnt - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BI CH0000956	Westwood Dynamic	20/09/2019	08:00:00	SubMntMnt - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BI CH0000955	Hope Works (Pty) Ltd	18/09/2019	08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
BI CH0000954	Green Tea Supplies	17/09/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

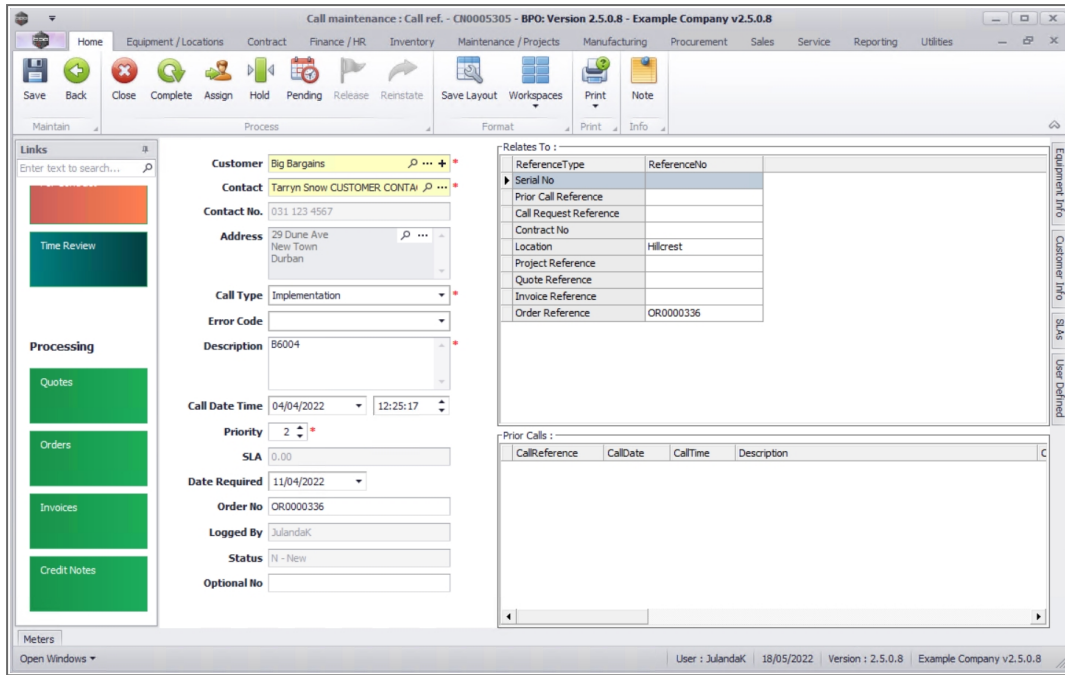
• Click on the **Edit** button.

Call Listing - BPO Version 2.5.1.4 - Example Company

CallRef	CustomerName	CallDate	CallTime	Description	CallType	CallDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BI CH0001003	Young Electric	12/22/2022	12:59:10	Test account balance	CR	Change Request			107		3
BI CH0001002	Seaboard Drive	12/22/2022	06:38:20	Test call for account balance manual	DR	Select Call Type			BI-12/202		3
BI CH0001001	Young Electric	20/11/2022	11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			an123		3
BI CH0000999	Hope Works (Pty) Ltd	20/08/2022	14:58:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP1234567		3
BI CH0000991	Aplic. Ltda Inc	24/02/2022	05:36:15	Contact Closure - C0000005	DR	Select Call Type					2
BI CH0000989	Derton / Technologies	13/04/2022	09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
BI CH0000988	Young Electric	02/04/2022	06:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	an123		3
BI CH0000987	Young Electric	06/04/2022	06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123		3
BI CH0000986	Young Electric	07/04/2022	06:00:00	Call logged 3 days ago for elapse time checks	DR	Select Call Type			an123		3
BI CH0000985	Hope Works (Pty) Ltd	18/04/2022	05:09:13	Test future call - for elapsed time	LPG	Upgrade			20-98765		3
BI CH0000984	Hope Works (Pty) Ltd	08/04/2022	06:00:00	Test elapsed hours - 2 day prior	TEST	Testing			AT0000000		3
BI CH0000983	Hope Works (Pty) Ltd	09/04/2022	06:00:33	Test elapsed time 2 - day prior	TEST	Testing			SN234123456		3
BI CH0000982	Young Electric	18/04/2022	06:00:35	Test elapsed hours 1	TEST	Testing			an123		3
BI CH0000976	Young Electric	19/11/2019	13:24:29	Test with site manager email entered	ADM	Administration			107		3
BI CH0000974	Hope Works (Pty) Ltd	18/11/2019	06:30:26	Test another call email	ADM	Administration			059319151		3
BI CH0000972	Hope Works (Pty) Ltd	18/11/2019	15:57:00	Test new call for email description in body	CR	Change Request			059319151		3
BI CH0000971	Westwood Dynamic	29/11/2019	08:00:00	SubMntMnt - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BI CH0000970	Westwood Dynamic	22/11/2019	08:00:00	SubMntMnt - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BI CH0000969	Hope Works (Pty) Ltd	16/11/2019	08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
BI CH0000968	Green Tea Supplies	16/11/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BI CH0000967	Westwood Dynamic	15/11/2019	08:00:00	SubMntMnt - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BI CH0000966	Westwood Dynamic	08/11/2019	08:00:00	SubMntMnt - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BI CH0000965	Westwood Dynamic	02/11/2019	08:00:00	SubMntMnt - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BI CH0000964	HOCK PC - IT Shop	26/10/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BI CH0000963	Westwood Dynamic	25/10/2019	08:00:00	SubMntMnt - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BI CH0000962	Hope Works (Pty) Ltd	19/10/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			19-30300		2
BI CH0000961	Hope Works (Pty) Ltd	18/10/2019	08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
BI CH0000960	Westwood Dynamic	18/10/2019	08:00:00	SubMntMnt - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BI CH0000959	Westwood Dynamic	11/10/2019	08:00:00	SubMntMnt - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BI CH0000958	Westwood Dynamic	04/10/2019	08:00:00	SubMntMnt - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BI CH0000957	Westwood Dynamic	27/09/2019	08:00:00	SubMntMnt - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BI CH0000956	Westwood Dynamic	20/09/2019	08:00:00	SubMntMnt - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BI CH0000955	Hope Works (Pty) Ltd	18/09/2019	08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
BI CH0000954	Green Tea Supplies	17/09/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

• The **Call maintenance : Call ref. - [call number]** screen will be displayed.

• Click on the **Invoices** tile.



- 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 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

Home | Equipment / Locations | Contract | Finance / HR | Inventory | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities


Add | Edit | Comment and Reference | View | Save Layout | Workspaces | Print | Send Invoices To Print Queue | Export | Durban | Refresh

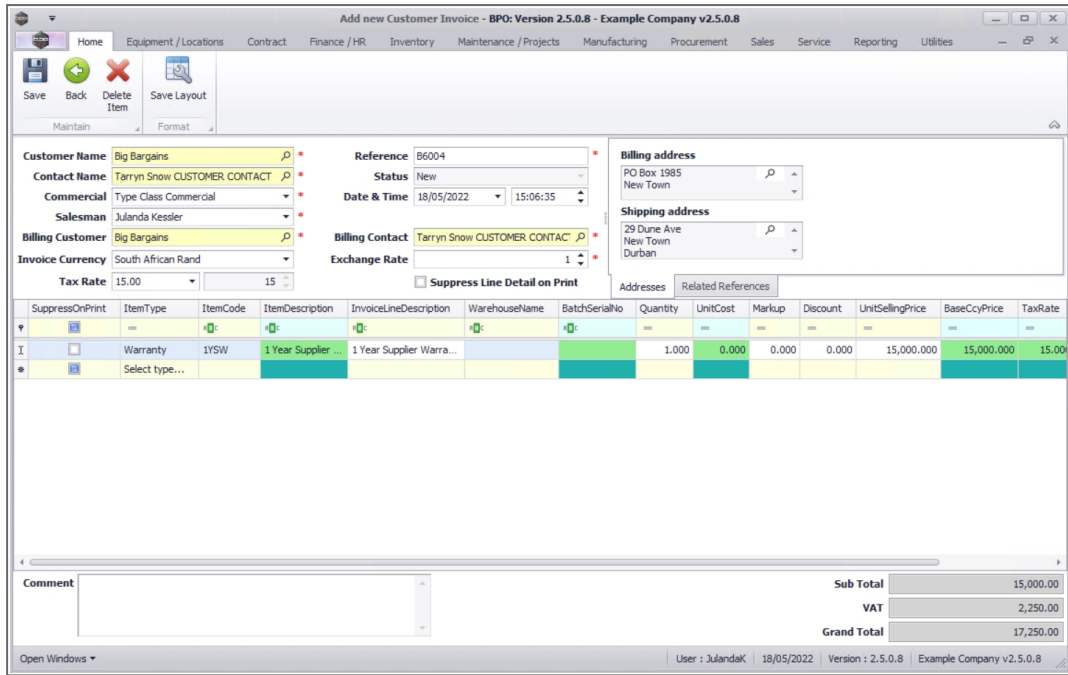
Links: Enter text to search... | Drag a column header here to group by that column

InvoiceNo	CustomerCode	CustomerName	InvoiceDescription	InvoiceValue	Currency	ExchangeRate	TaxRate	InvoiceDate	InvoiceStatus	SalesmanEmpNo	Sales
INV0000582	BIG0001	Big Bargains	SO004	893.55	ZAR	1.00	15.00	17/05/2022	N	KES001	Juland

Open Windows | User : JulandaK | 18/05/2022 | Version : 2.5.0.8 | Example Company v2.5.0.8

- " 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.

-  **Remember:**
- - **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.



- 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.

The screenshot shows the 'Edit Customer Invoice' window for invoice K2B0000035. The interface includes a top navigation bar with tabs like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the navigation bar are buttons for Save, Back, Delete Item, and Save Layout. The main area is divided into several sections: Customer Name (GUE Molen Distributors), Reference (Orders001126), Status (New), Date & Time (06 Aug 2024), Billing Contact (Genesis Rose), and Invoice Currency (South African Rand). A table of invoice items is displayed below, with columns for Suppress/Print, Item Type, Item Code, Item Description, Invoice Line Description, Warehouse Name, Batch/Serial No, Quantity, Unit Cost, Markup, Discount, Unit Selling Price, Base Cost Price, Tax Rate, Department, and Status. The table contains four rows: a copier, a paper tray, a toner block, and a maintenance kit. A 'Warranty' row is also present. At the bottom right, a summary table shows Sub Total (5,197.76), VAT (779.67), and Grand Total (5,977.43).

Suppress/Print	Item Type	Item Code	Item Description	Invoice Line Description	Warehouse Name	Batch/Serial No	Quantity	Unit Cost	Markup	Discount	Unit Selling Price	Base Cost Price	Tax Rate	Department	Status
	Parts	SP2020	Sprint Multi Functional Copier	Sprint Multi Functional Copier	K2 - Main		1.00	3,529.26	5.00	0.00	3,705.72	3,705.72	15.00	Administration	A
	Parts	SP2020-1992	Paper Tray	Paper Tray	K2 - Main		1.00	1,015.46	5.00	0.00	1,066.24	1,066.24	15.00	Executive Committee	A
	Parts	SP2020-2671	Toner Black	Toner Black	K2 - Main		1.00	354.83	20.00	0.00	425.80	425.80	15.00	Executive Committee	A
	Parts	SP2020-7652	Maintenance Kit	Maintenance Kit	2N - Main		1.00	0.00	25.00	0.00	0.00	0.00	15.00	Executive Committee	A
	Warranty	1MSW	1 Month Supplier Warranty	1 Month Supplier Warranty			1.00	0.00	0.00	0.00	0.00	0.00	15.00	Executive Committee	A

- 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 \(OTC\)](#)

Customer Name: Big Bargains
Contact Name: Tarryn Snow CUSTOMER CONTACT
Commercial: Type Class Commercial
Salesman: Julanda Kessler
Billing Customer: Big Bargains
Invoice Currency: South African Rand
Tax Rate: 15.00

Reference: B6004
Status: New
Date & Time: 18/05/2022 15:06:35
Billing Contact: Tarryn Snow CUSTOMER CONTACT
Exchange Rate: 1

SuppressOnPrint	ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchSerialNo	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate
	Warranty	1YSW	1 Year Supplier	1 Year Supplier Warra...			1.000	0.000	0.000	0.000	15,000.000	15,000.000	15.00

Sub Total: 15,000.00
VAT: 2,250.00
Grand Total: 17,250.00

INVOICE LISTING

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

InvoiceNo	CustomerCode	CustomerName	InvoiceDescription	InvoiceValue	Currency	ExchangeRate	TaxRate	InvoiceDate	InvoiceStatus	SalesmanEmpNo	SalesmanName
INV0000582	BIG0001	Big Bargains	SO004	893.55	ZAR	1.00	15.00	17/05/2022	N	KES001	Julanda Kessler
INV0000583	BIG0001	Big Bargains	B6004	17,250.00	ZAR	1.00	15.00	18/05/2022	N	KES001	Julanda Kessler

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**.

The screenshot shows the 'Sales Invoices for Call' application window. The title bar reads 'Sales Invoices for Call CN0005305 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8'. The interface includes a menu bar with options like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu bar is a toolbar with icons for Add, Edit, Comment and Reference, View, Save Layout, Workspaces, Print, Send Invoices To Print Queue, and Export. A dropdown menu is open over the 'Print' icon, showing options for 'Print' and 'Current'. The main area displays a table of invoices with the following data:

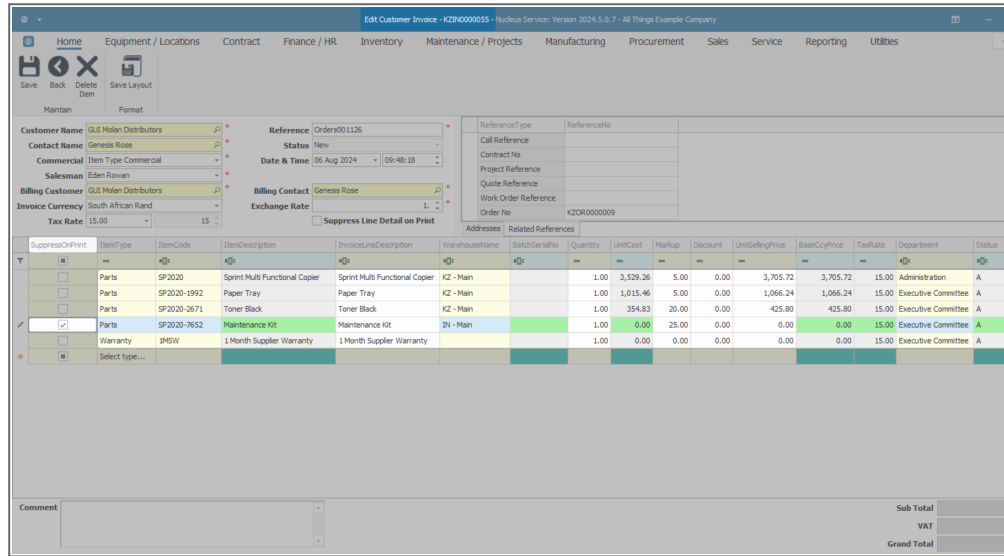
InvoiceNo	CustomerCode	CustomerName	InvoiceDescription	InvoiceValue	Currency	ExchangeRate	TaxRate	InvoiceDate	InvoiceStatus	SalesmanEmpNo	Sales
INV0000582	BIG0001	Big Bargains	SO004	893.55	ZAR	1.00	15.00	17/05/2022	N	KES001	Juland
INV0000583	BIG0001	Big Bargains	B6004	17,250.00	ZAR	1.00	15.00	18/05/2022	N	KES001	Juland

The status bar at the bottom indicates 'User : JulandaK | 18/05/2022 | Version : 2.5.0.8 | Example Company v2.5.0.8'.

- 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**.

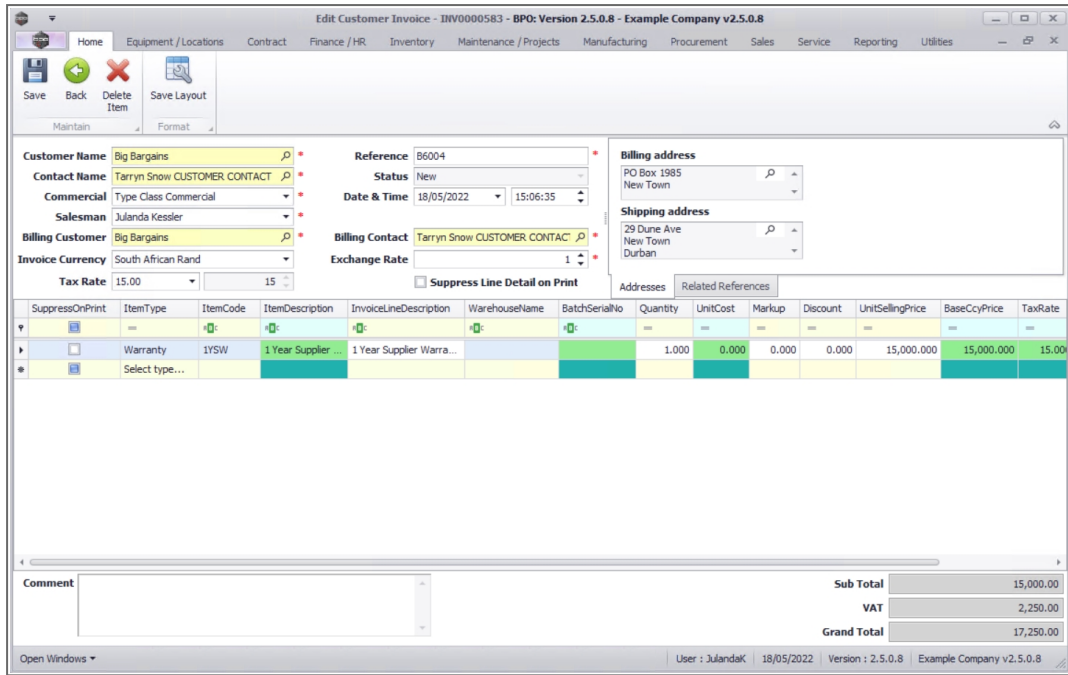
Calls - Invoice a Call

- **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



You will return to the updated **Sales Invoices for Call** listing screen.

COMMENT AND REFERENCE

You will be able to add or view 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

Edit Customer Invoice - INV000377 - BPO: Version 2.1.0.43 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Delete Item | Save Layout | Print

Customer Name: Westwood Dynamic | Reference: Additional Items for Service | ReferenceType: | ReferenceNo: | Status: New | Serial No: 14-9652365 | Date & Time: 20 Dec 2017 12:26:05 | Call Reference: CH0000505 | Contract No: C00000011 | Location: | Project Reference: | Quote Reference: | Salesman: Sarah Milder | Billing Customer: Westwood Dynamic | Billing Contact: Jason March | Invoice Currency: South African Rand | Exchange Rate: 1 | Tax Rate: 14 | Suppress Line Detail on Print

Item Type	Item Code	Item Description	Invoice Line Description	Warehouse Name	Batch Number	Quantity	Unit Cost	Markup	Discount	Unit Selling Price	Base Cost Price	Tax Rate	Department	Suppress On Print	Status
Parts	147-88...	K147 Black toner	K147 Black toner	Main Warehouse		1.00	310.29	0.00	0.00	360.00	360.00	14.00	Sales Dep...	<input type="checkbox"/>	A
Travel	50	Travel not exceed...	Travel not exceedin...			1.00	0.00	0.00	0.00	175.00	175.00	14.00	Sales Dep...	<input type="checkbox"/>	A
Expenses	TOLL	Toll	Marianhill Toll Fee x 2			1.00	55.00	0.00	0.00	55.00	55.00	14.00	Sales Dep...	<input type="checkbox"/>	A

Comment:

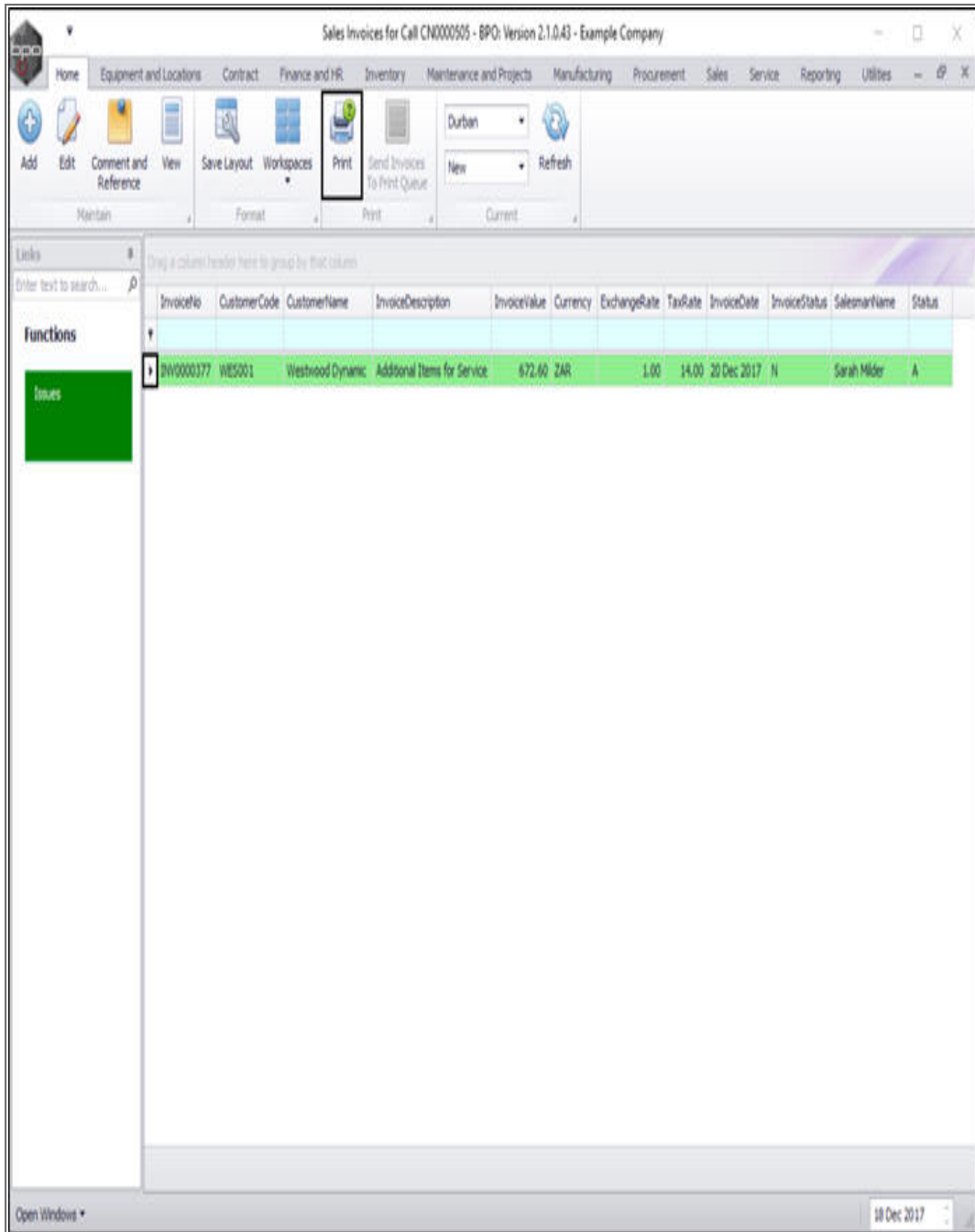
Sub Total: 590.00
VAT: 82.60
Grand Total: 672.60

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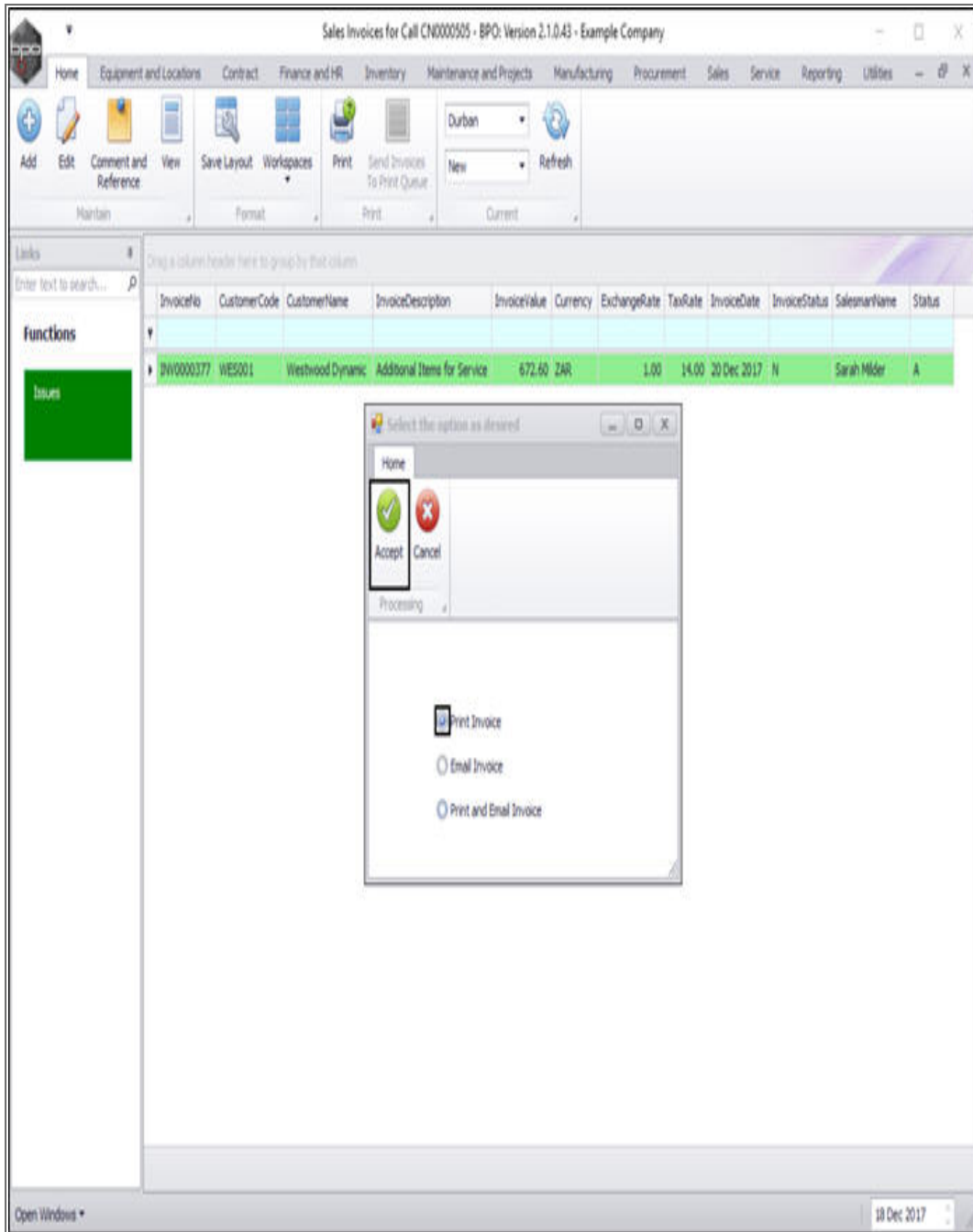
You will return to the **Sales Invoices for Call [invoice number]** screen where you can view the newly raised **invoice**.

PRINT INVOICE

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



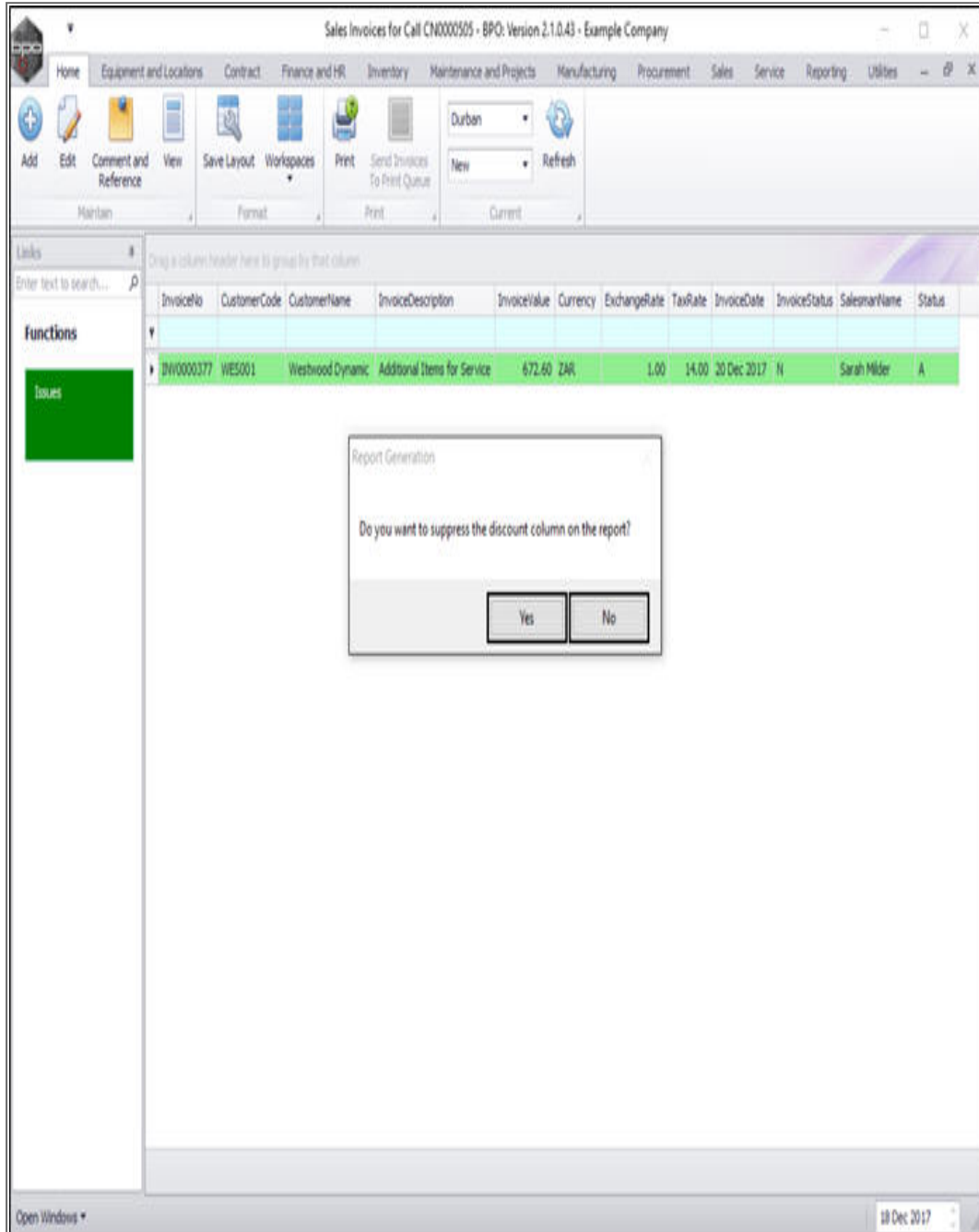
- A **Select the option as desired** screen will pop up.
- Click on **Print Invoice**.
- Click on **Accept**.



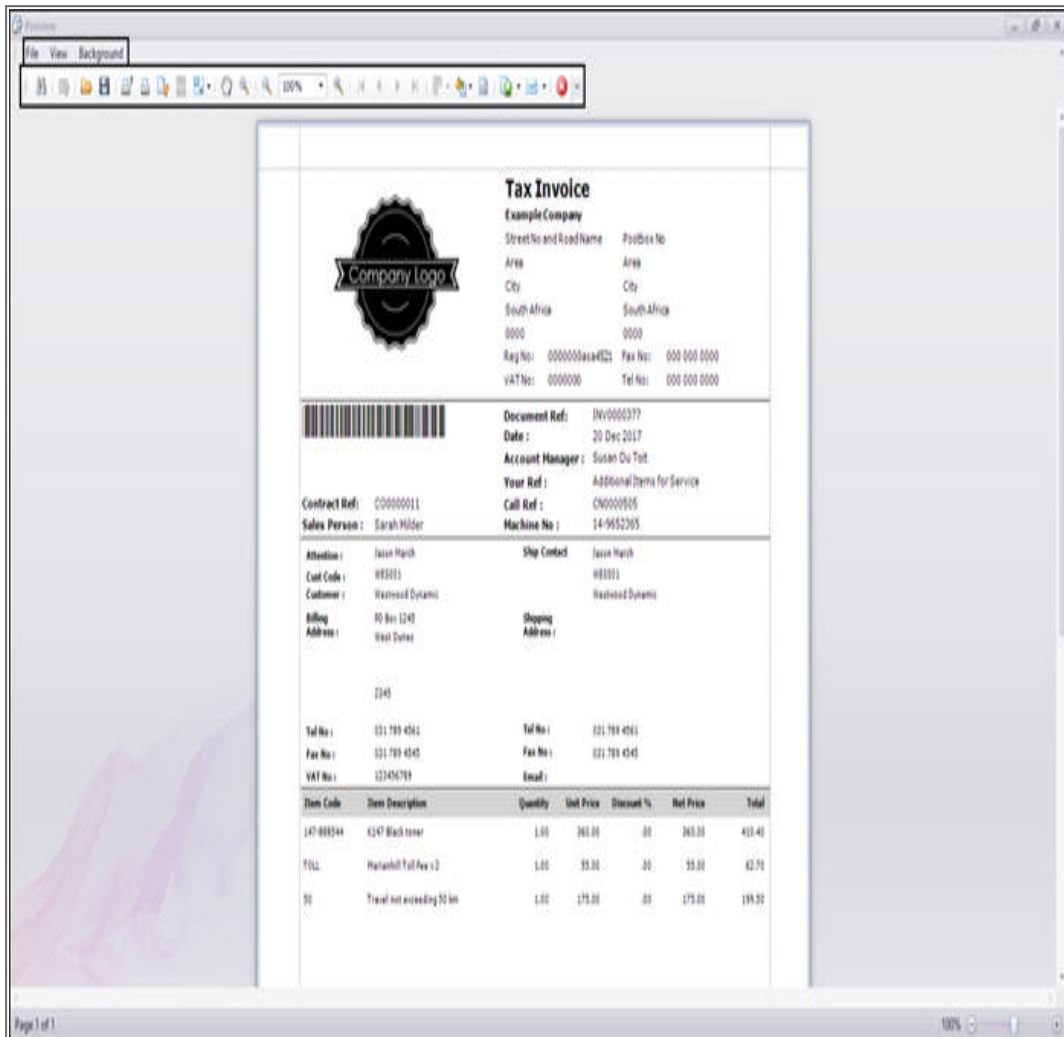
SUPPRESS THE DISCOUNT COLUMN ON THE REPORT

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

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

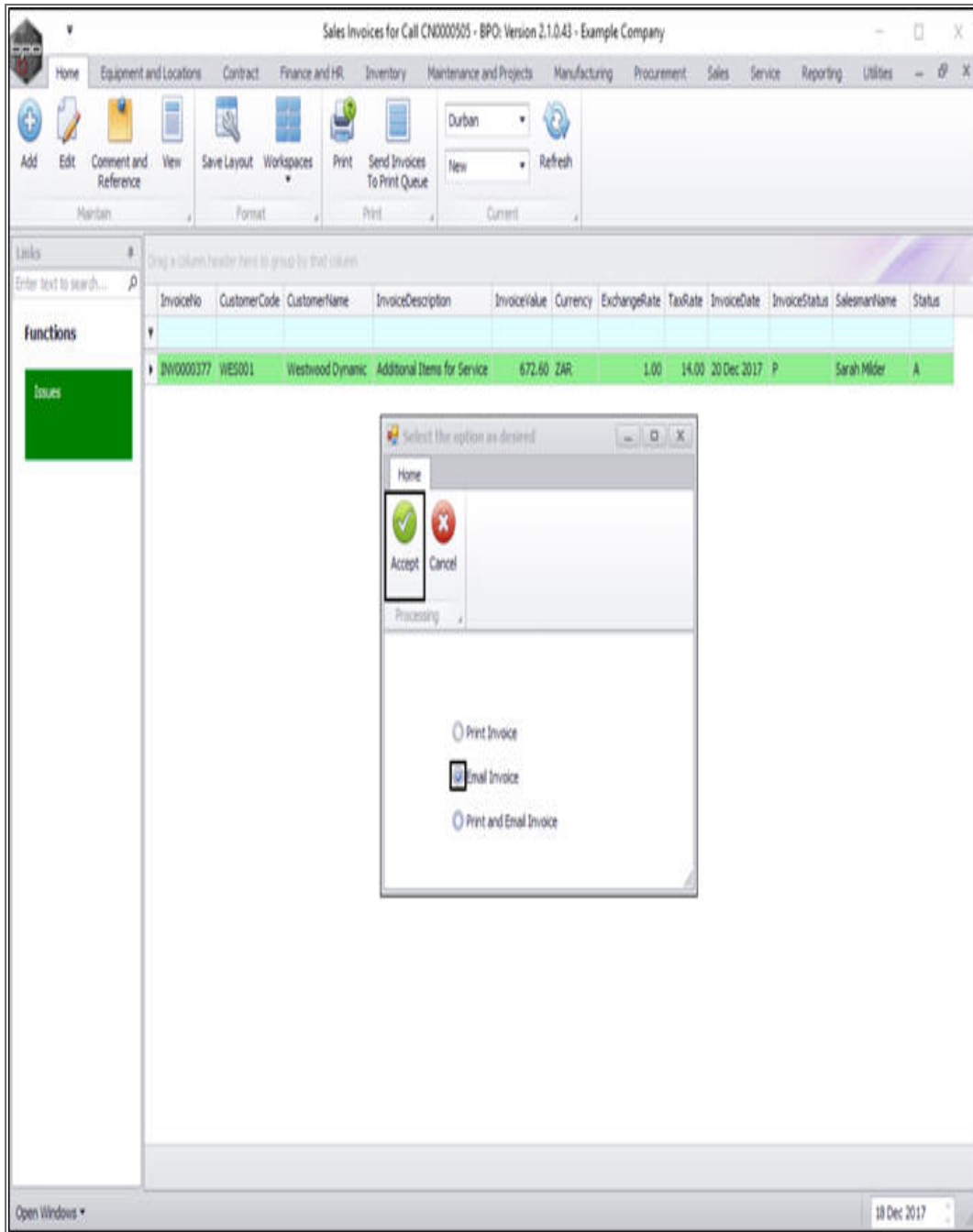


- The **Report Preview** screen will be displayed.
- From here you can **View, Print, Export** or **Email** the Invoice.
- **Close** the Report Preview screen when done.



EMAIL INVOICE

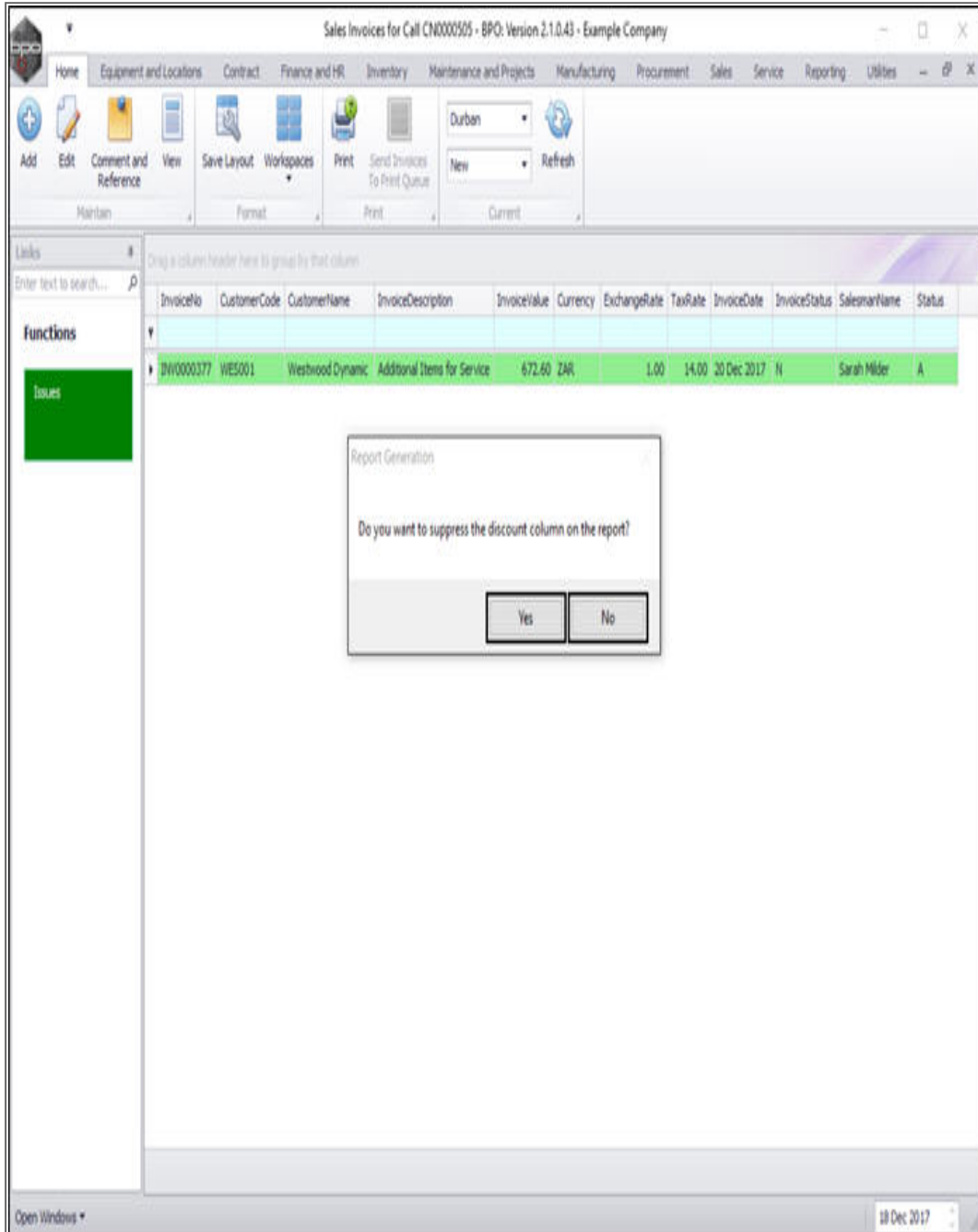
- In the **Select the option as desired** screen,
- Click on **Email Invoice**.
- Click on **Accept**.



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?

- 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.

Employee: Sarah Milder

From: _____

To: _____

CC: _____

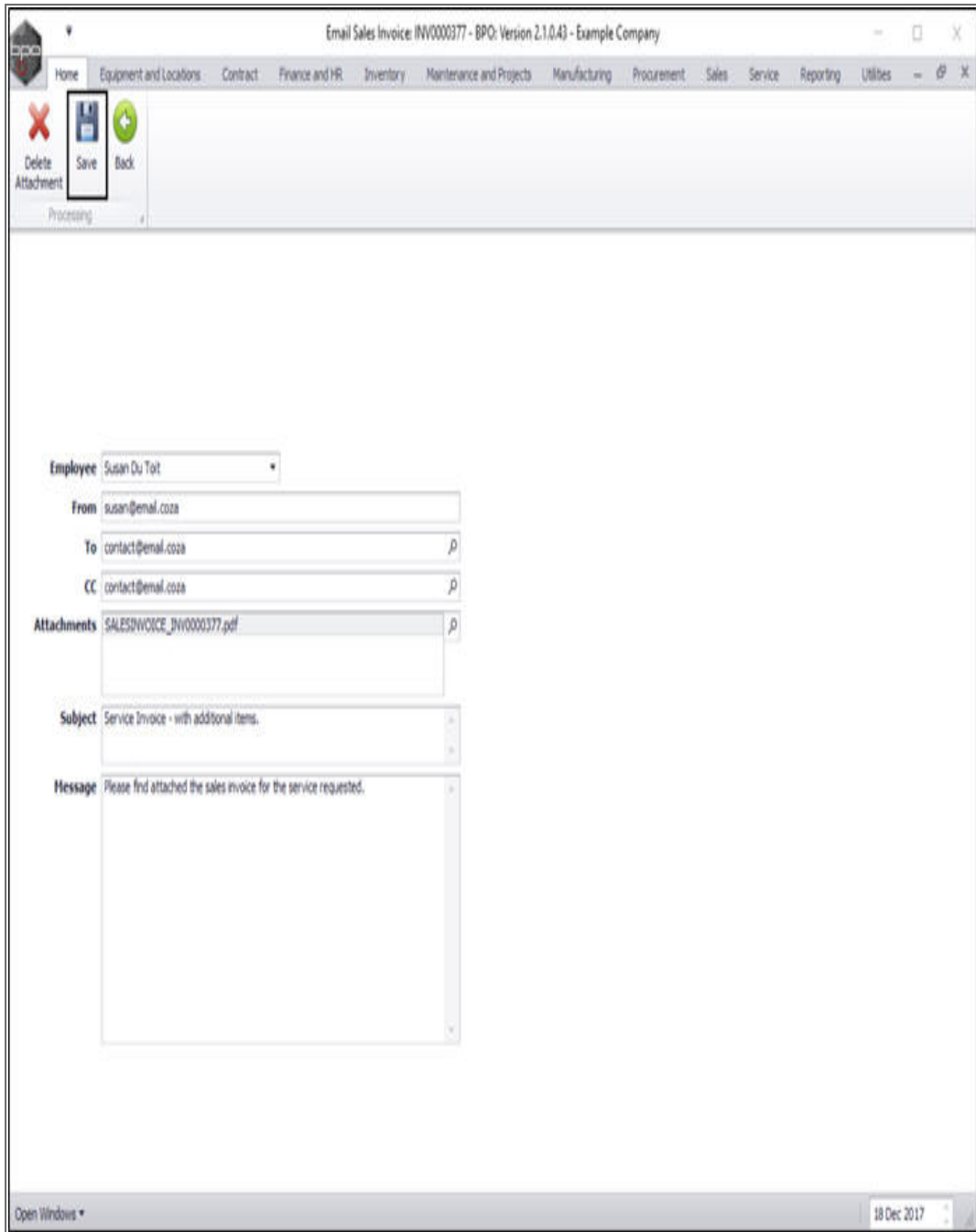
Attachments: SALESINVOICE_INV0000377.pdf

Subject: _____

Message: _____

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- When you have finished adding details to the Email Sales Invoice page, click on **Save**.



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

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