

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.

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

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### NAVIGATE TO CUSTOMER DASHBOARD (CUSTOMER HOME PAGE)

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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.

CRM Example Company Abigail Milne

Dashboard 1

Search

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Email	30	2	0
Meeting	20	0	2
On Site inspection	20	1	0
Phone call	20	2	0

1 Month Performance

4 Month Pipeline

15 Oct 2019 19

75 customers

8 cases 2

7 activities

15 quotes

147 equipment

8 3rd party

Today Recent Calendar

Schedule Date Status

No data to display

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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.

The screenshot shows the CRM interface for 'Example Company' with user 'Abigail Milne'. The 'Customers' dashboard is active. A search bar is present with the placeholder text 'Type Customer name search filter here...'. Below is a table of customer records with columns: View, Customer, Code, Contact, Contact phone, Contact email, Complet, Status, Rank, Active, and Call Contact. The table lists 10 customers with varying completion percentages and statuses. At the bottom, there is a pagination control showing 'Page 1 of 8 (74 items)' and a page size dropdown set to 10.

View	Customer	Code	Contact	Contact phone	Contact email	Complet	Status	Rank	Active	Call Contact
?	ABC SHoe Co	ABCXYZ12				8%	Active	Gold	Yes	No
?	ABI Goods	ABI0001	Lucy	081023503€		50%	New - CRM	Metal	No	Yes
?	Another new customer	ANO0001				8%	Active		No	No
?	Apple Juice Inc	APP0001	Duncan McCreddie			50%	Active	Gold	Yes	Yes
?	Bearing and Shoe	BEA001				25%	Active	Metal	No	No
?	Bernies Builders	BER0001				8%	Active		No	No
?	Betties Summer Shop at the Beach	BET0001	Bettie Summervel	031 123 45€		50%	Active	Gold	No	Yes
?	Big Bargains	BIG0001				8%	Active		Yes	No
?	Billys Barn	BIL0001				8%	Active		No	No
?	Bits and Bytes	BIT001				8%	Active		No	No

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

**CRM Example Company** Abigail Milne

ABC SHoe Co Search

Description	Target	Existing Custmrs	New Custmrs
Email	30	2	0
Meeting	20	0	2
On Site inspection	20	1	0
Phone call	20	2	0

**1 Month Performance**

Bar chart showing performance for Cases, Invoices, Orders, and Quotes.

**4 Month Pipeline**

Bar chart showing pipeline for Nov 2019, Dec 2019, Jan 2020, and Feb 2020.

ABC SHoe Co - ABCXYZ123

Trading Name: 8%  
 Registered Name  
 Description  
 VAT No: 9876543210  
 Rank: Gold  
 Website  
 Phone

Created: 2016/10/18 3:21:43 PM

Navigation Grid:

- create cold call
- recommendations
- warnings
- customers
- cases
- activities
- quotes
- orders
- invoices** (highlighted)
- credit notes
- equipment
- contracts
- service calls
- 3rd party
- files

**12 Months Sales History**

Line chart showing Contract Income and Sales Revenue from January 2018 to January 2019.

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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.

Invoice No	Invoice Type	Reference	Invoice Value	Invoice Date	Salesman Name
<a href="#">INV0000354</a>	Parts	1234	2930.11	08 Jun 2017	Bianca Du Toit
<a href="#">INV0000405</a>	Parts	test	402.50	20 Nov 2017	Bianca Du Toit

Page 1 of 1 (2 items) [1] Create Filter

## 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** .

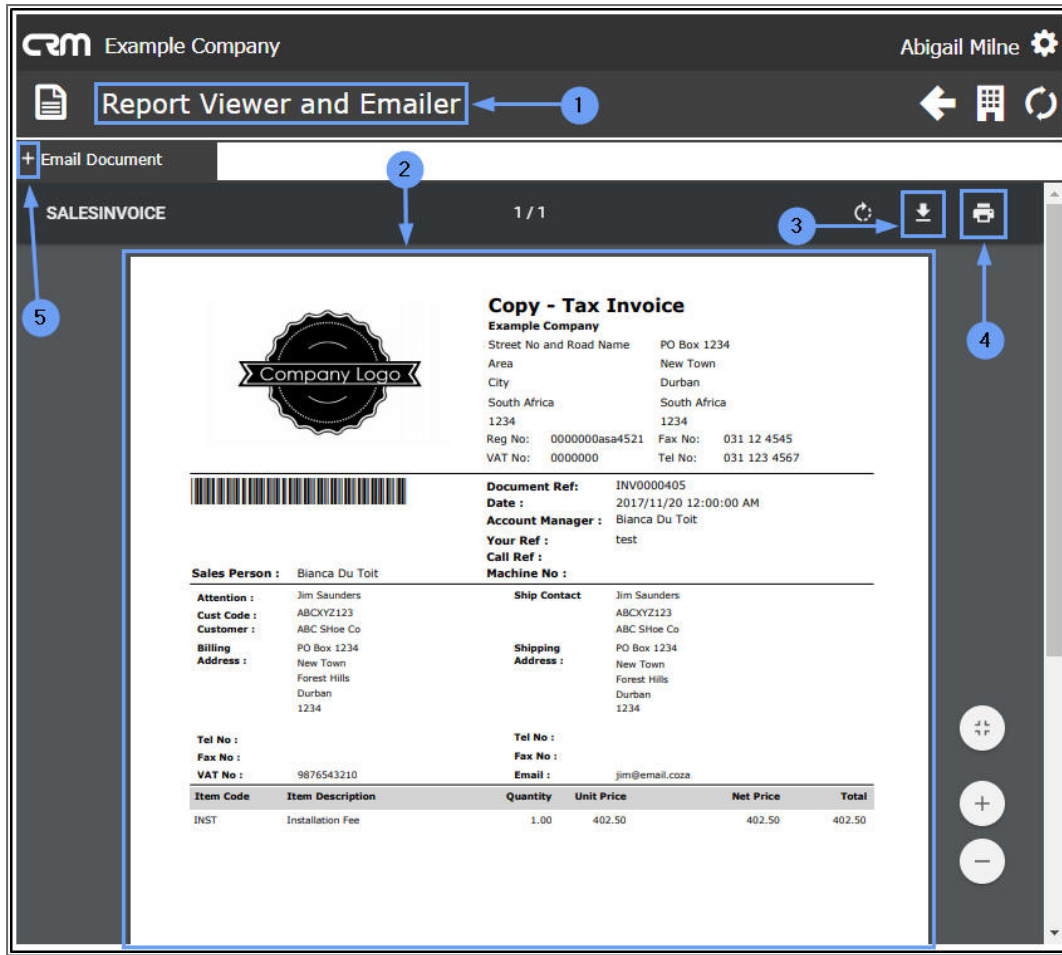
The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main heading is 'Invoices for ABC SHoe Co'. Below this is a table with columns: Invoice No, Invoice Type, Reference, Invoice Value, Invoice Date, and Salesman Name. Two rows are visible: one for invoice INV0000354 and another for INV0000405. Below the table is a pagination bar showing 'Page 1 of 1 (2 items)' and a 'Page size' dropdown set to 10. A 'Create Filter' button is located below the pagination bar. Numbered callouts point to: 1. The pagination controls; 2. The 'Reference' column header; 3. The 'Create Filter' button; 4. The 'Invoice No' cell for INV0000405.

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

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.

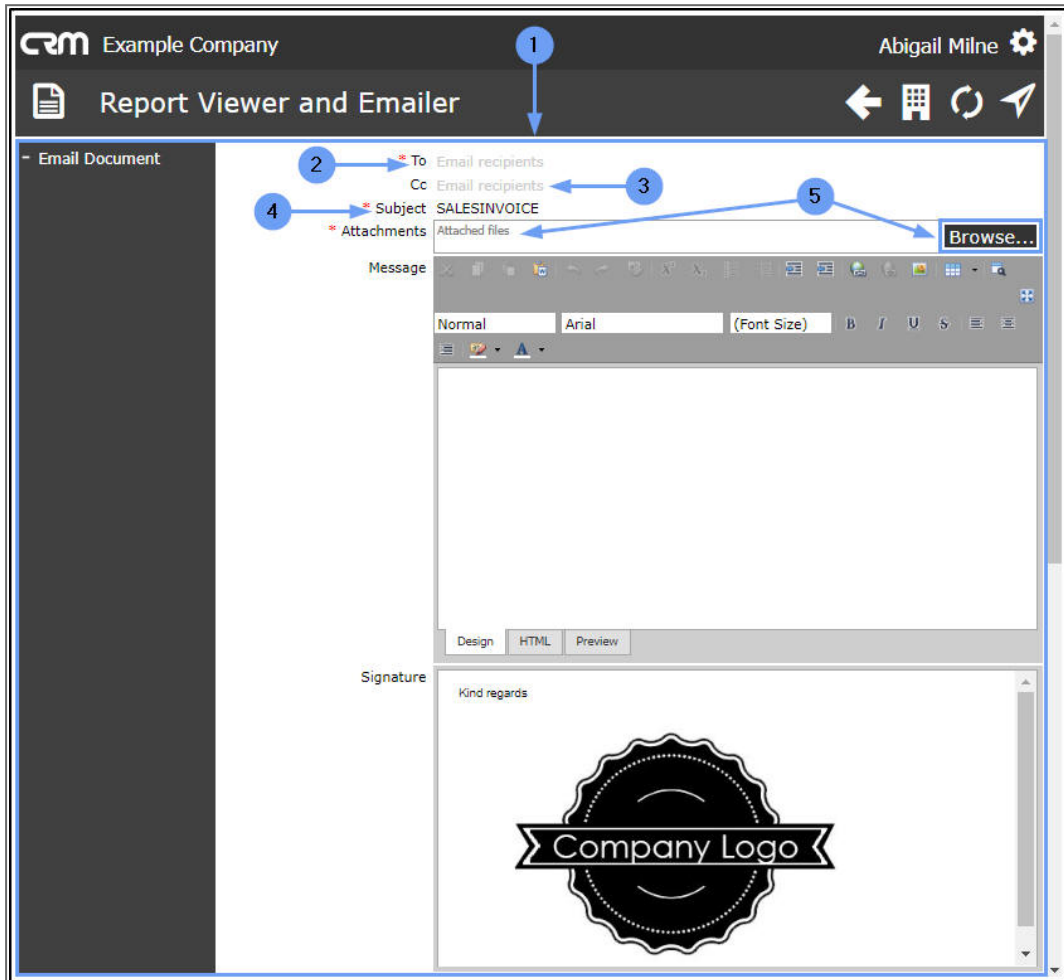
Check and/or add the following details, as necessary:

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

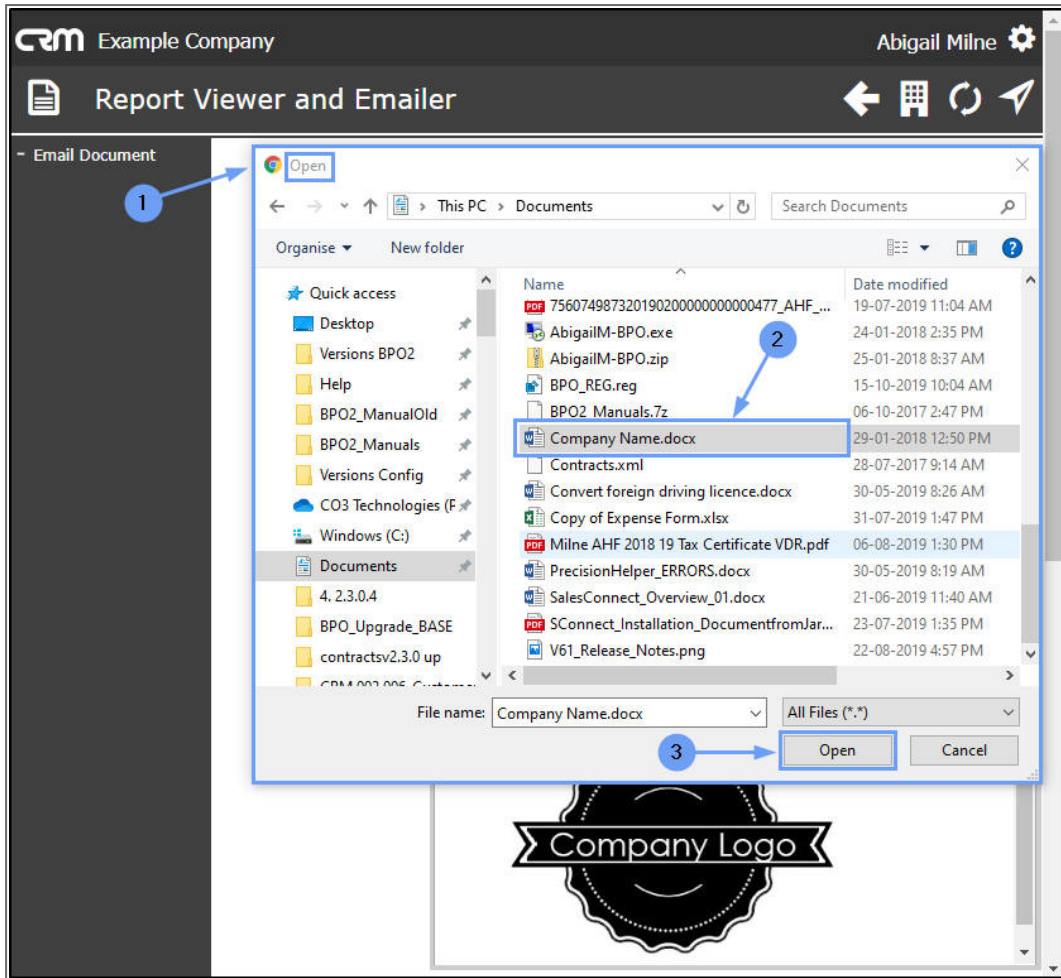
You can add other documents, as attachments, if required.

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

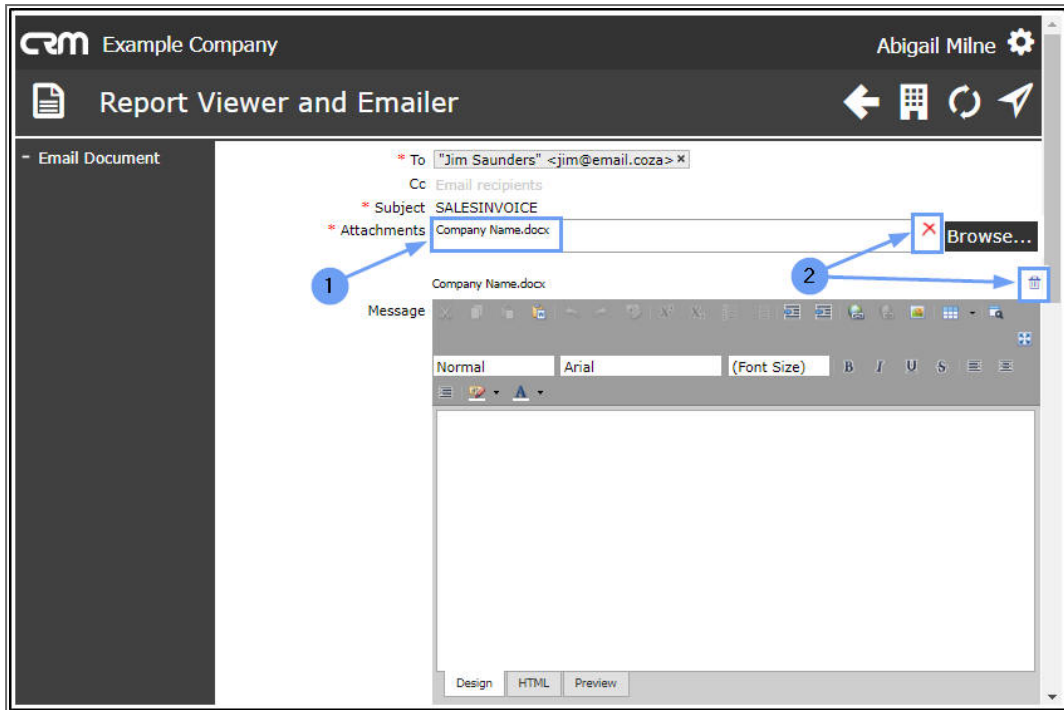


1. The **Open** screen will pop up.
2. Search for and select the file you wish to link to this Invoice.
3. Click on **Open**.

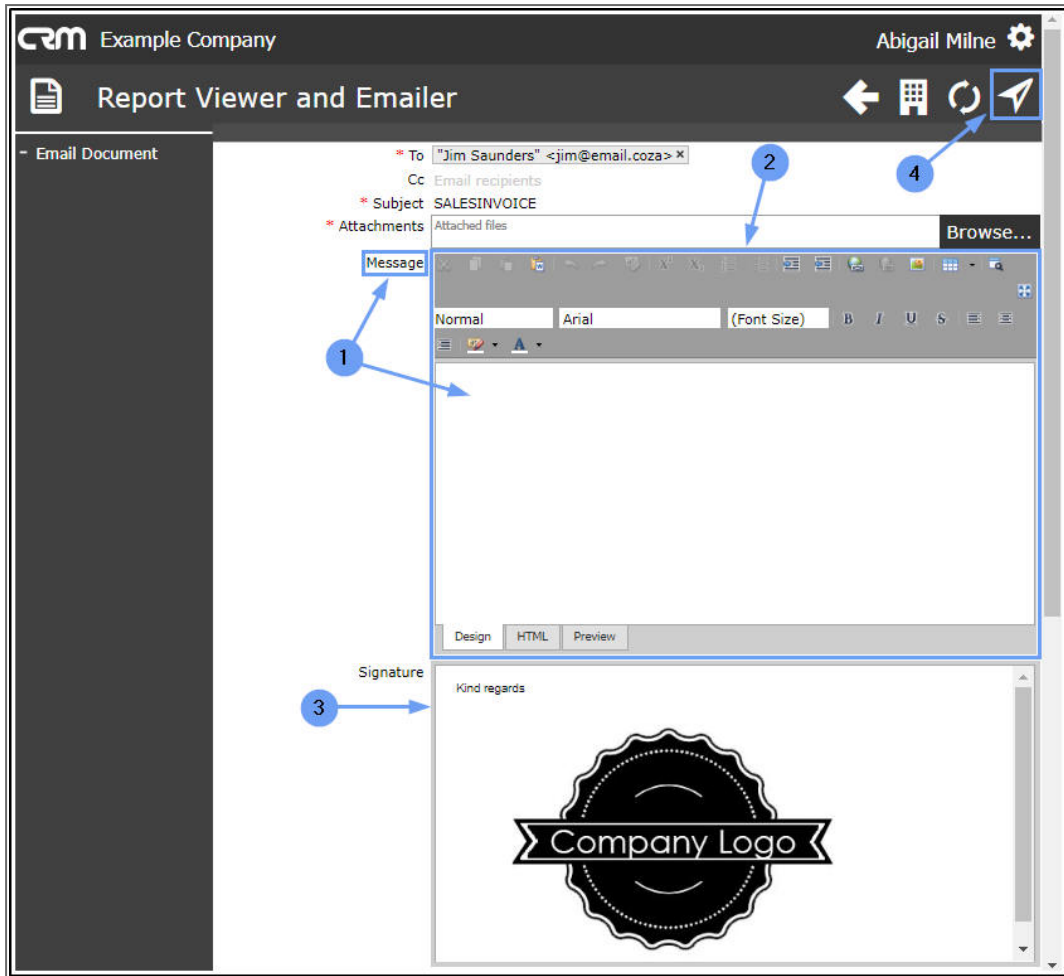




1. The file will now be attached to the email.
2. You can delete the attachment if required by clicking on either of the **Delete** icons.



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** .

Report Viewer and Emailer

SALESINVOICE 1 / 1

### Copy - Tax Invoice

**Example Company**  
 Street No and Road Name PO Box 1234  
 Area New Town  
 City Durban  
 South Africa South Africa  
 1234 1234  
 Reg No: 0000000asa4521 Fax No: 031 12 4545  
 VAT No: 0000000 Tel No: 031 123 4567

**Document Ref:** INV0000405  
**Date :** 2017/11/20 12:00:00 AM  
**Account Manager :** Bianca Du Toit  
**Your Ref :** test  
**Call Ref :**  
**Machine No :**

**Sales Person :** Bianca Du Toit

**Attention :** Jim Saunders  
**Cust Code :** ABCXYZ123  
**Customer :** ABC Shoe Co  
**Billing Address :** PO Box 1234  
 New Town  
 Forest Hills  
 Durban  
 1234

**Ship Contact** Jim Saunders  
 ABCXYZ123  
 ABC Shoe Co  
**Shipping Address :** PO Box 1234  
 New Town  
 Forest Hills  
 Durban  
 1234

**Tel No :**  
**Fax No :**  
**VAT No :** 9876543210

**Tel No :**  
**Fax No :**  
**Email :** jim@email.co.za

Item Code	Item Description	Quantity	Unit Price	Net Price	Total
INST	Installation Fee	1.00	402.50	402.50	402.50

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).

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main heading is 'Invoices for ABC SHoe Co'. Below it is a table with columns: Invoice No, Invoice Type, Reference, Invoice Value, Invoice Date, and Salesman Name. Two rows of data are visible. Annotations 1-4 point to specific UI elements: 1 points to the main heading, 2 points to the first two invoice numbers, 3 points to the back and refresh icons, and 4 points to the refresh icon on the left.

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

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Page size: 10

Create Filter

CRM.002.008

