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

CRM CUSTOMERS

VIEW / PRINT CREDIT NOTES

In CRM, you can view and print Sales Credit Notes for your Customers.

However, it is important to note that Sales Credit Notes are created in BPO only.

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

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In CRM, Credit Notes can only accessed from the selected Customer Home page so you will first need to navigate to the Customers listing page to select your customer.
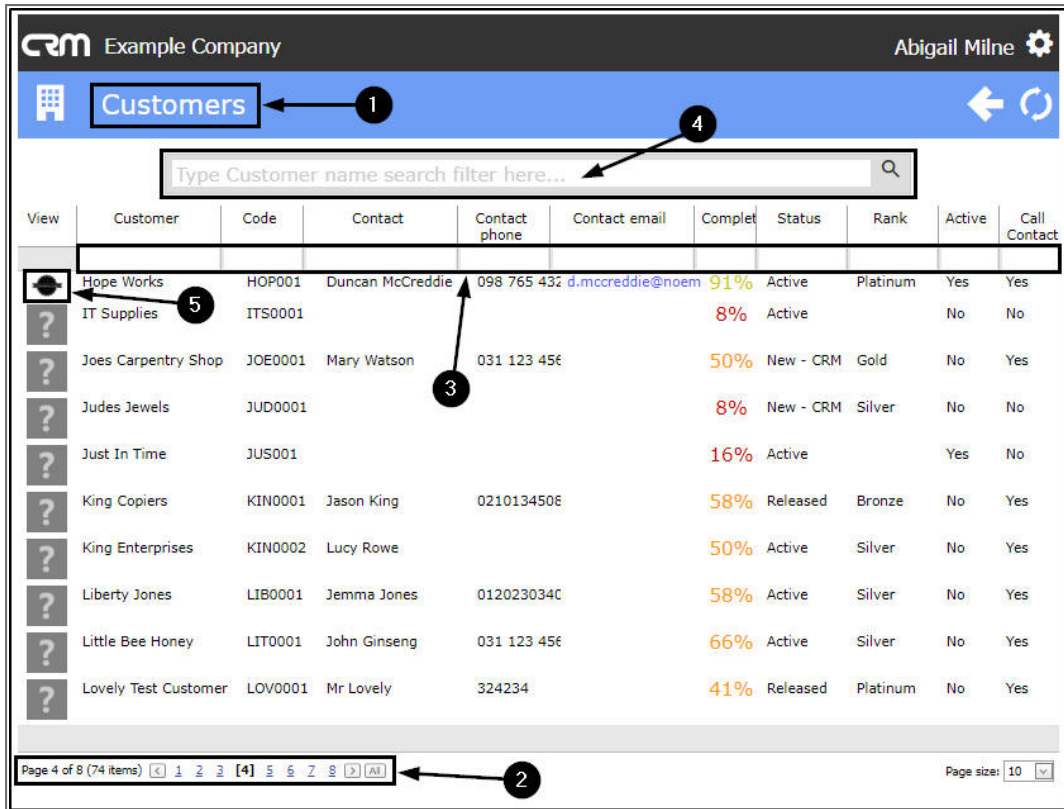
NAVIGATE TO CUSTOMER DASHBOARD (HOME PAGE)

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 selected Customer Home page will open.

   Note that for the purpose of this manual, the Customer Dashboard has been hidden from this page.

2. Click on the Credit Notes tile.

THE CREDIT NOTES FOR [SELECTED CUSTOMER] LISTING PAGE

1. The **Credit Notes for [**selected Customer**]** listing page will open.
2. The blue highlighted Credit Note numbers can be selected to be viewed and/or printed. These Credit Notes are in either the Approved or Printed status in BPO.
3. The black Credit Note numbers <u>cannot</u> be viewed or printed. They are in the New, Released or Declined status in BPO.

For more information about Credit Note status in BPO refer to Introduction to Credit Notes.

SEARCH FOR AND SELECT A CREDIT NOTE

1. You can use the Filter Row,
2. the Page Reference field, or
3. the Create Filter row to search for a specific Credit Note.

VIEW, DOWNLOAD OR PRINT CUSTOMER CREDIT NOTE

- In the Credit Note No. column, click on a blue number of the Credit Note that you wish to **View**, **Print** or **Download** .

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

| Order No	Order Status	Order Status Desc	Order Value	Currency
OR0000238	I	Invoiced order	14073.30	ZAR
OR0000239	N	New order	517.50	ZAR
OR0000240	I	Invoiced order	6210.00	ZAR
OR0000242	I	Invoiced order	6210.00	ZAR
OR0000243	I	Invoiced order	6210.00	ZAR
OR0000244	I	Invoiced order	3220.00	ZAR
OR0000246	N	New order	2686.98	ZAR
OR0000247	I	Invoiced order	1005.10	ZAR
OR0000248	I	Invoiced order	805.00	ZAR
OR0000249	I	Invoiced order	6210.00	ZAR

Page 14 of 14 (140 items) < 1 2 3 ... 8 9 10 11 12 13 [14] > All   Page size: 10

Create Filter

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

EMAIL CREDIT NOTE

5. Click on the expand icon [**+**] on the **Email Document** tab.
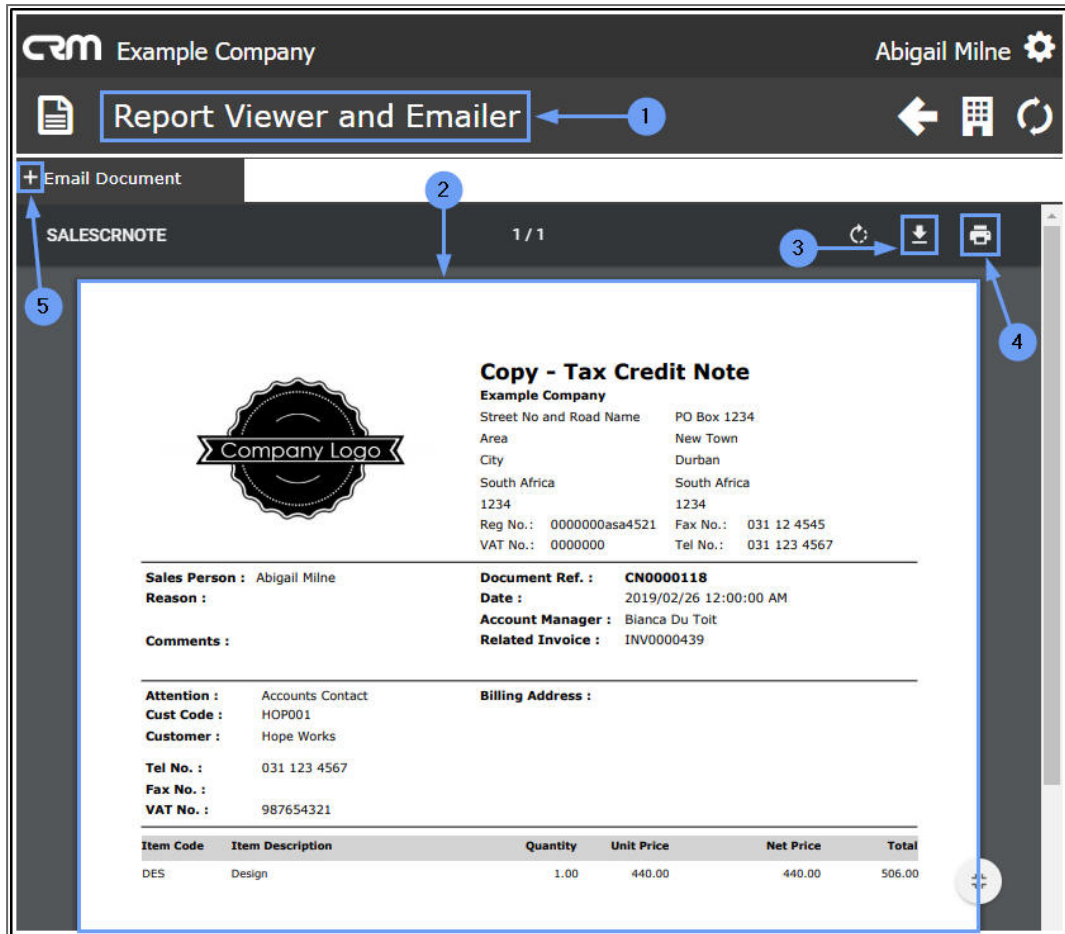
1. The **Email Document** frame will be expanded.

    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 **SALESCRNOTE** but you can edit this, if required.

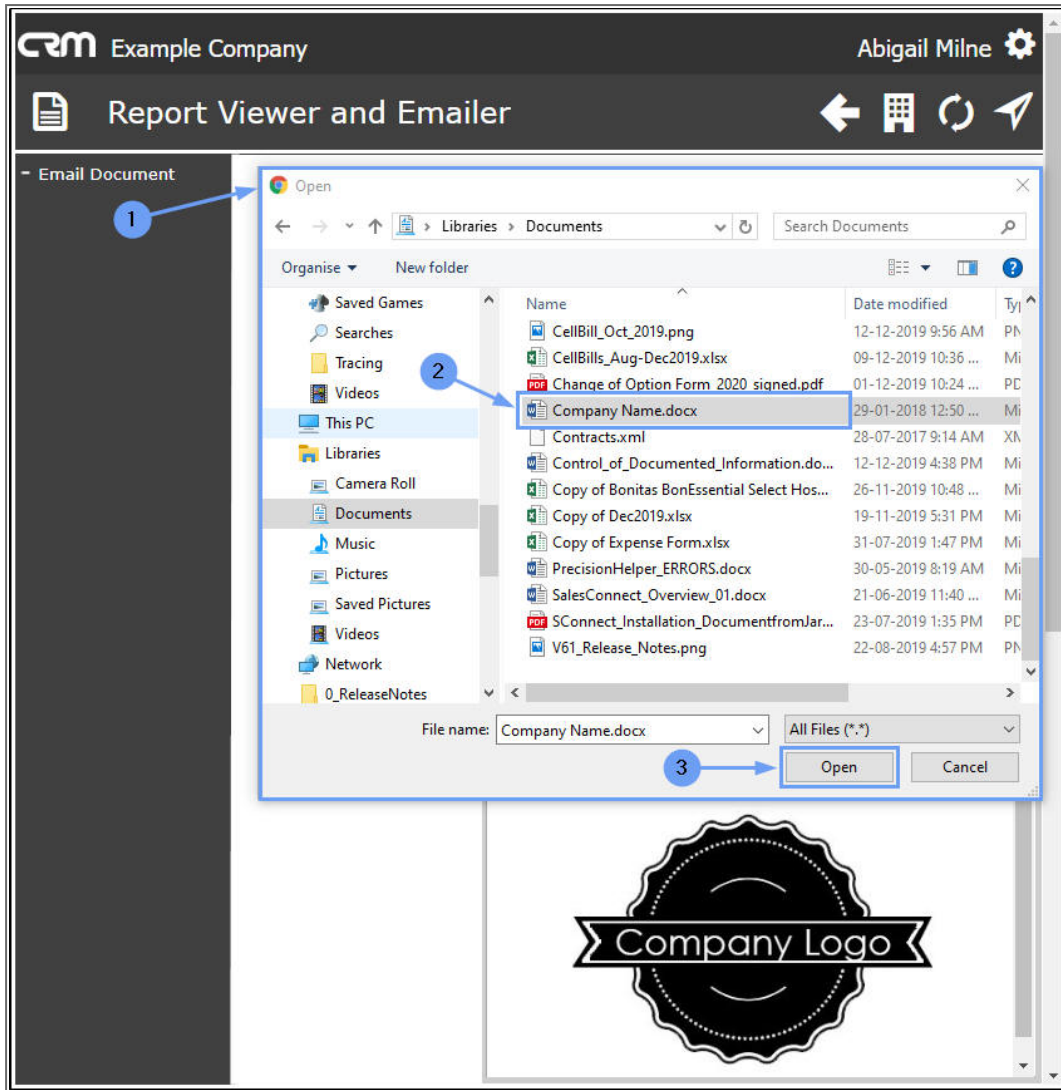# ADD AN ATTACHMENT

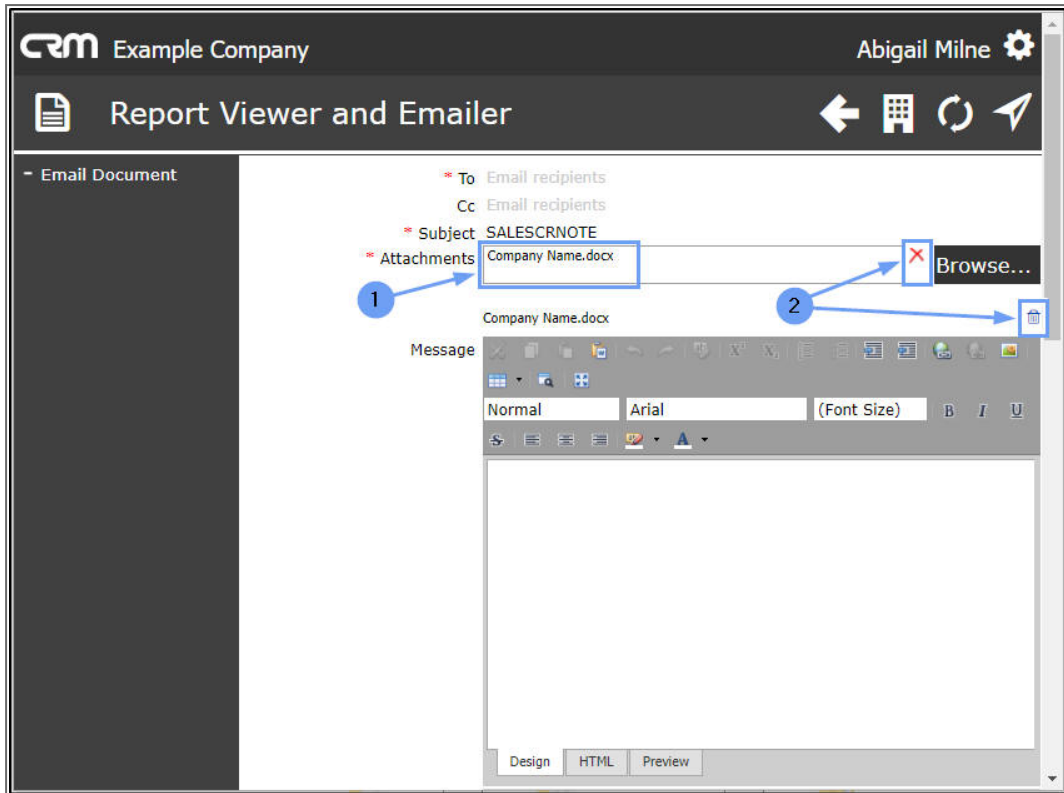You can add other documents, as attachments, if required.

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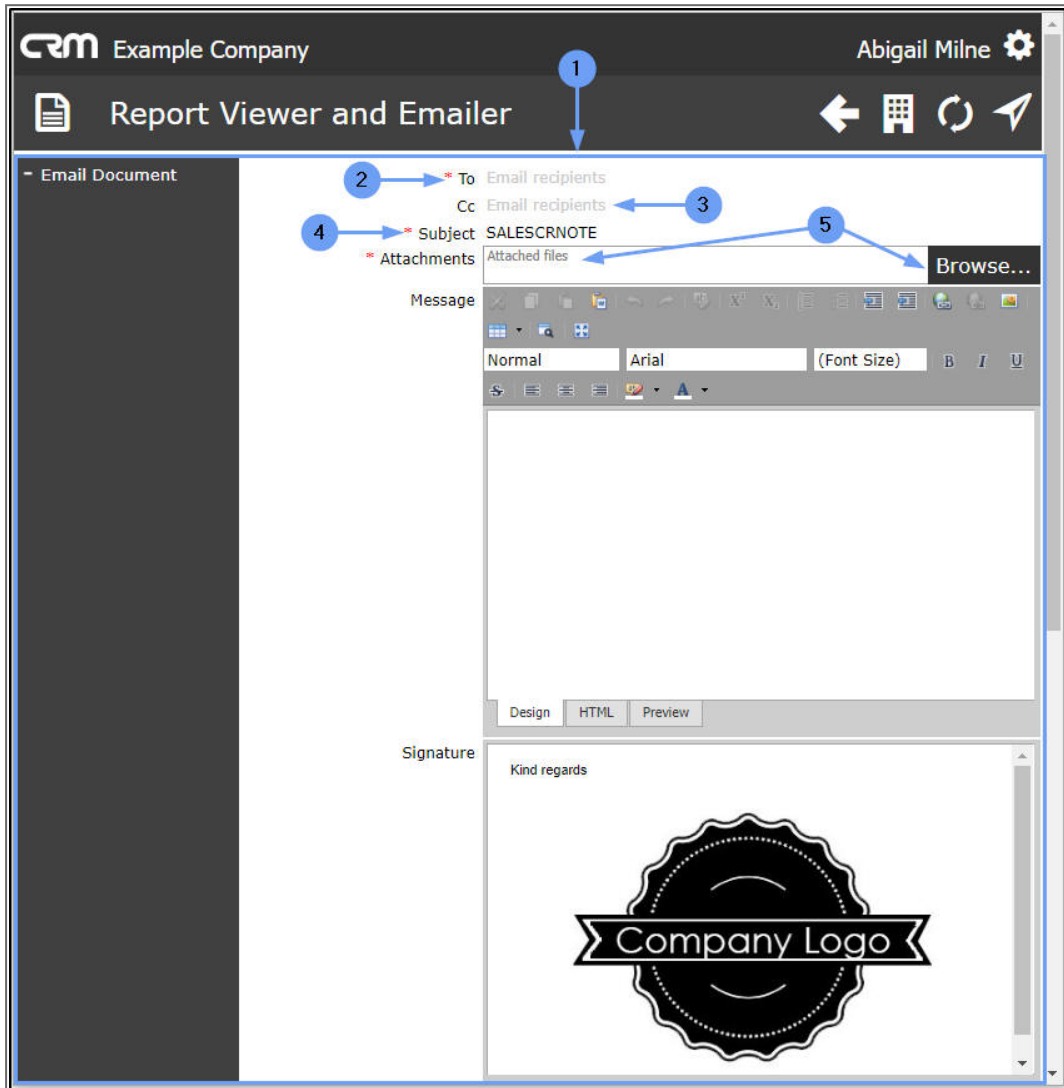
1. The **Open** screen will pop up.
2. Search for and select the file you wish to link to this Order.
3. Click on **Open** .

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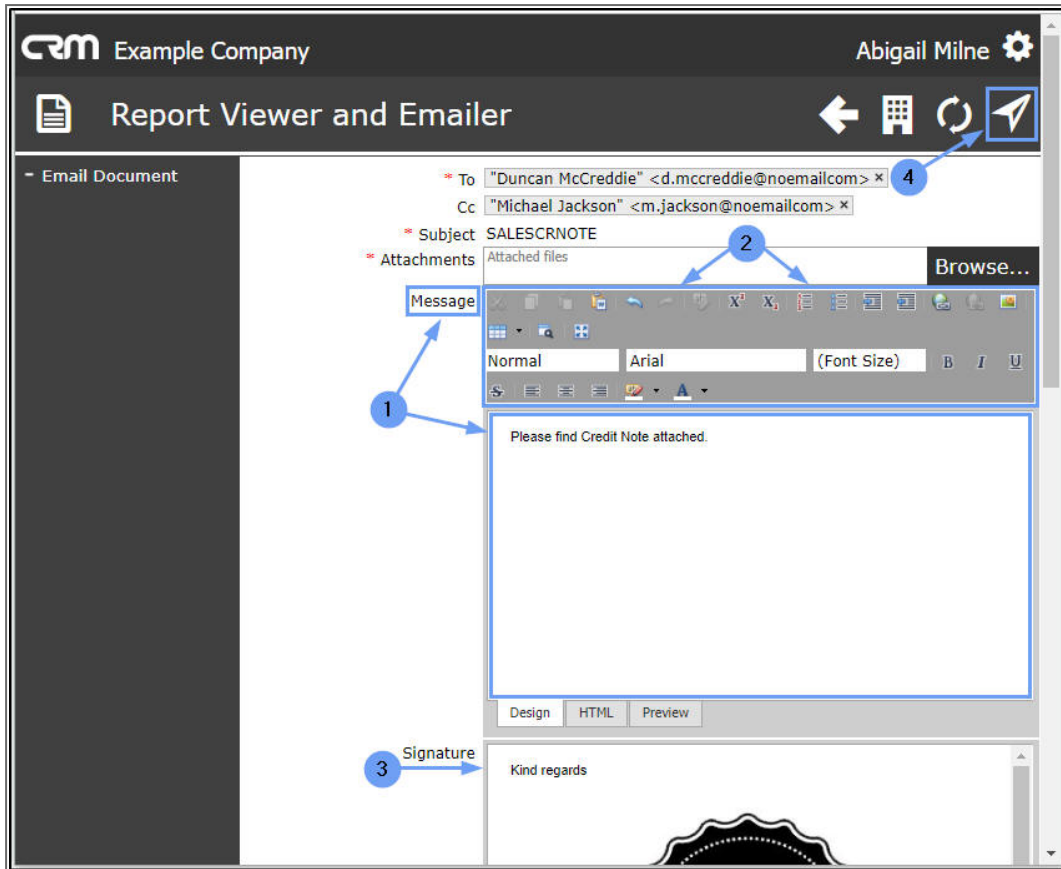
1. A **message box** will pop up informing you of the status of the sent email.
2. Click on **Back** .

   *Image********************

1. You will return to the **Credit Notes for [**selected customer**]** listing page.

2. Select another Credit Note 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).

   *Image************************

UNDER CONSTRUCTION

We are currently updating our site; thank you
for your patience, please check back soon.

CRM.002.009