

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

SALES

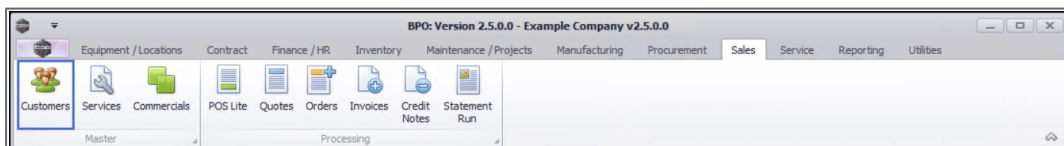
CUSTOMERS – INVOICE DELIVERY METHOD

The **Invoice Delivery Method** defines how the system will deliver the Invoices during the **Run Print / Email Batch** step of the [Month End Billing Run](#). The choices are **EMAIL**, **POST** (for printing), and **PREM** for Print and Email.

- **For Emails:** Make sure that the contact you link to the delivery method has a valid email address.
- **To Print:** These documents will print to the printer specified in the Printer Service Setup.

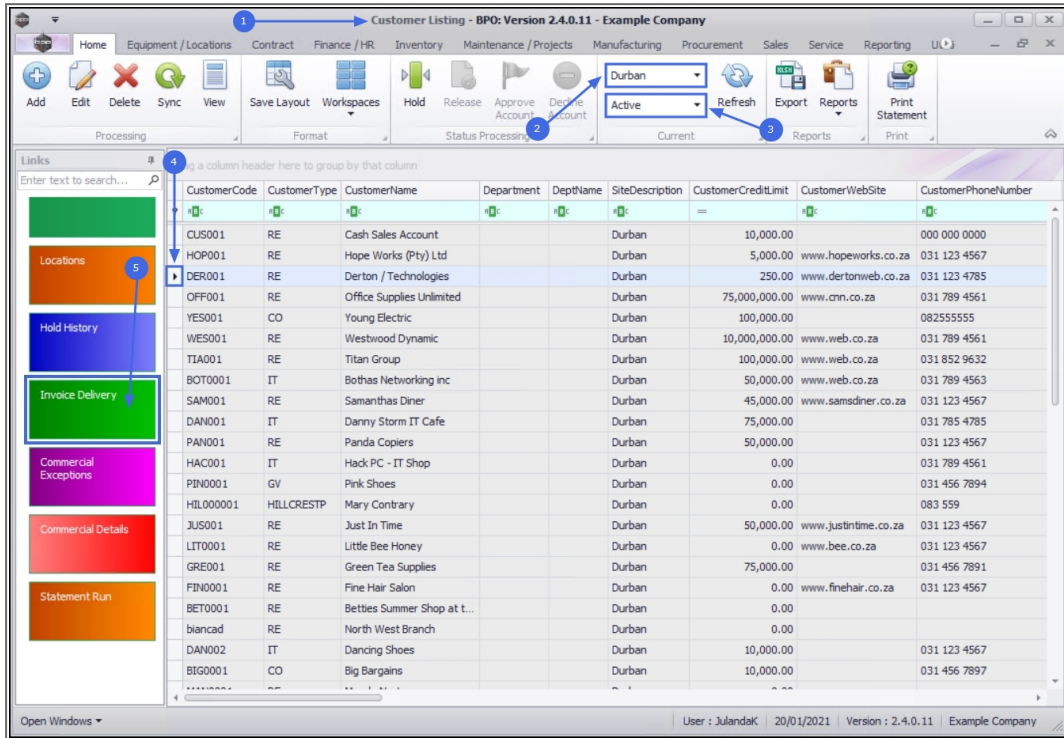
You can link unique document sales templates to specific clients. These custom layouts need to be created in [Report Designer](#) and specified as noted below. If templates aren't linked to a customer, the global custom layout will be used, if it exists, else the default report will be used.

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** for the customer.
 - The example has **Active** selected.

- Select the **row** of the **customer** where you wish to add an Invoice Delivery method to.
- Click on the **Invoice Delivery** tile.



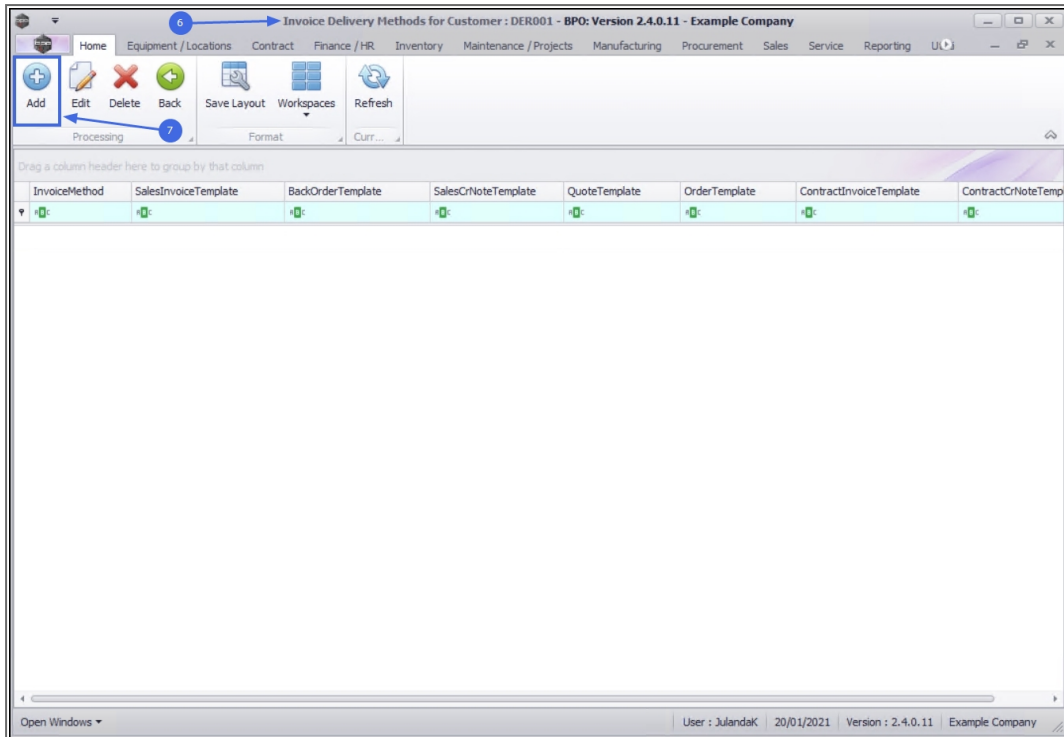
- The **Invoice Delivery Methods for Customer: [Customer Code]** screen will be displayed.

ADD DELIVERY METHOD

- Click on **Add**.



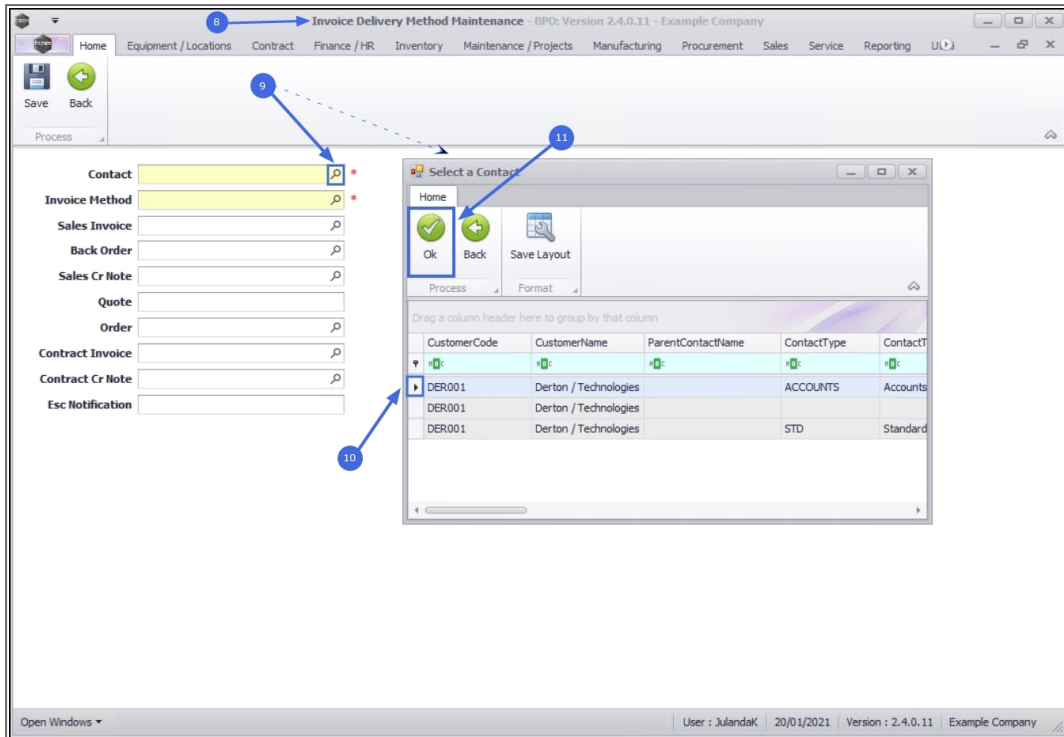
Short cut key: Right click to display the **Process** menu list. Click on **Add**.



8. The **Invoice Delivery Method Maintenance** screen will be displayed.

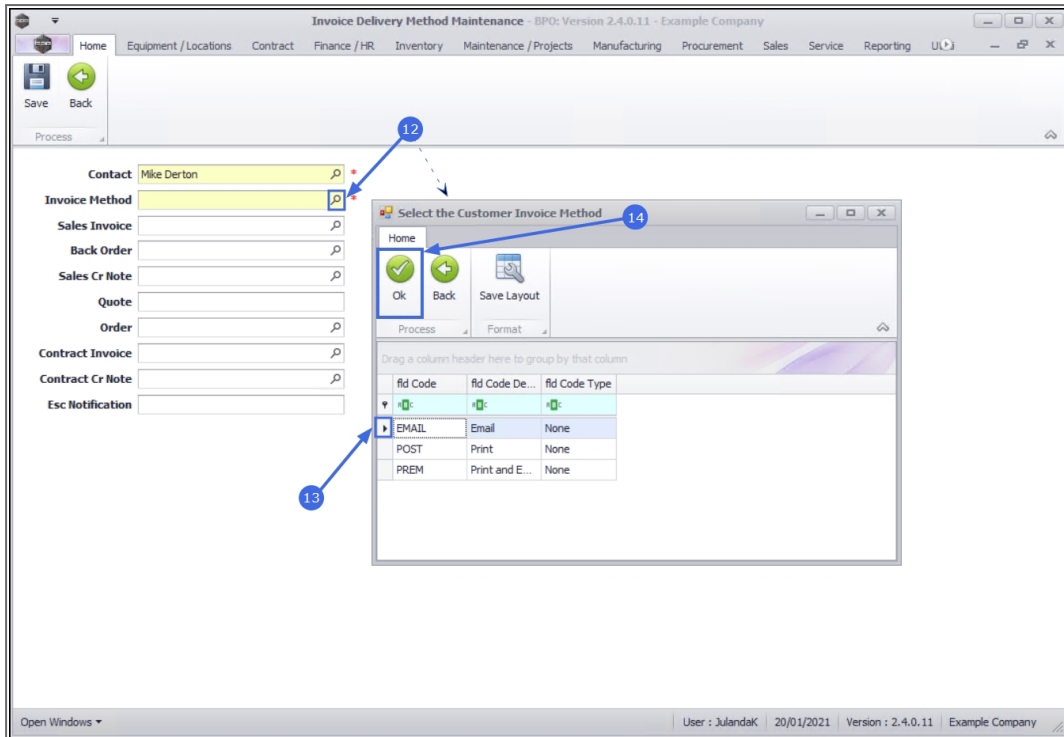
SELECT CONTACT

9. Click on the **search** button in the **Contact** field.
 - The **Select a Contact** screen will display.
10. Click on the **row** the invoice delivery contact you wish to add.
11. Click on **OK**.



SELECT DELIVERY METHOD

12. Click on the **search** button in the **Invoice Method** field.
 - The **Select the Customer Invoice Method** screen will display.
13. Click on the **row** of the **Invoice Method** you wish to add to this customer.
14. Click on **OK**.

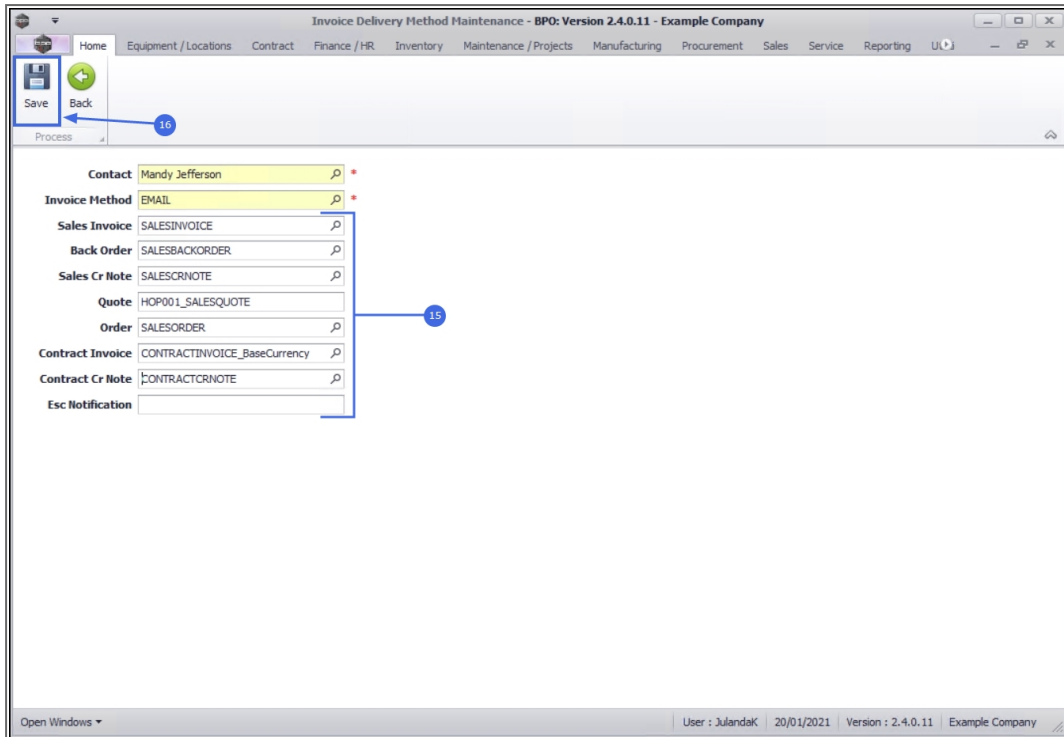


SALES DOCUMENT TEMPLATES

15. If you have [Client Specific Customized Sales Reports](#) that you wish to **add** to the invoice delivery method,
- Type in the name of the **client specific report** that you have saved in **Reports_STD** for the relevant documents

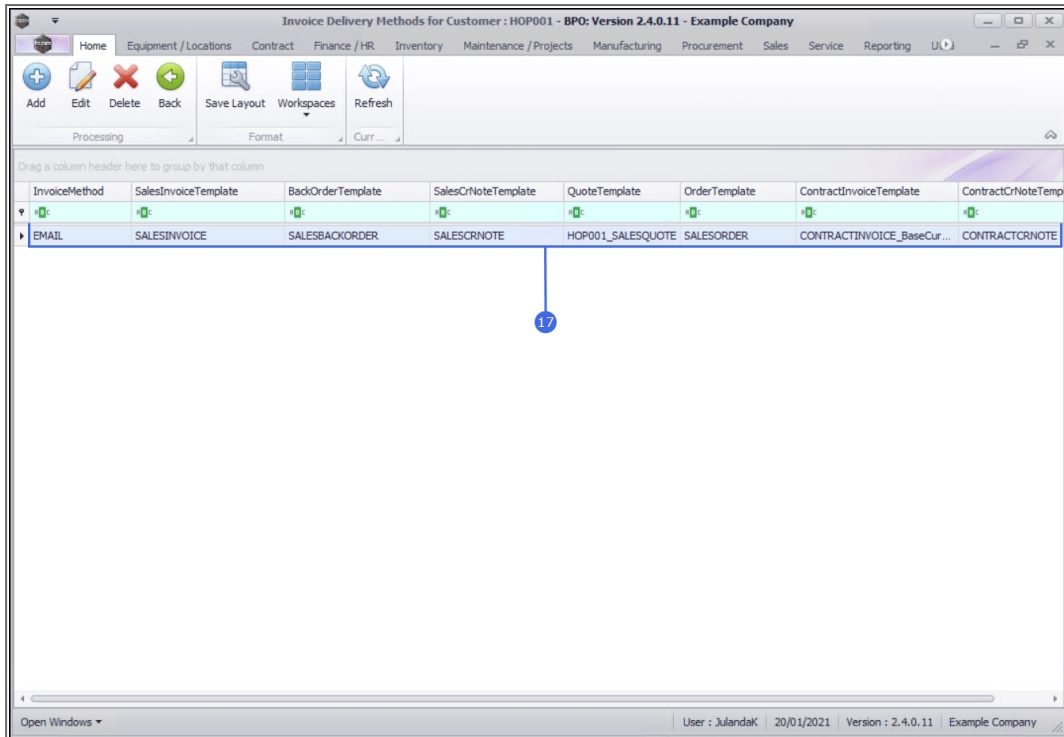
SAVE DELIVERY METHOD

16. Click on **Save**.



VIEW DELIVERY METHOD

17. The names of the client specific reports you have added can now be viewed in the **Invoice Delivery Method Maintenance** screen.

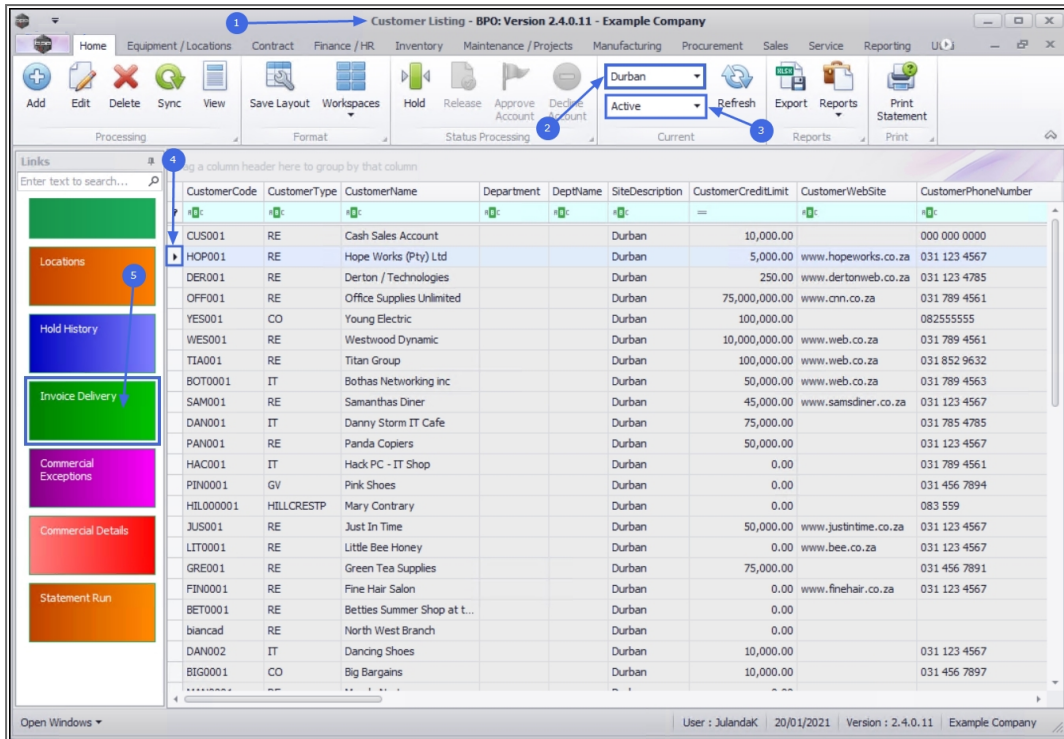


EDIT/VIEW DELIVERY METHOD

The edit option will give you access to **view** the Invoice Delivery Method as well as allow you to **edit** the existing Invoice Delivery Method information.

SELECT CUSTOMER

1. From the **Customer Listing** screen,
2. Select the **Site** of the customer you wish view or edit an invoice delivery method of.
 - The example has **Durban** selected.
3. Select the **Status** of the customer.
 - The example has **Active** selected.
4. Select the **row** of the customer where you wish to edit an **Invoice Delivery method**.
5. Click on the **Invoice Delivery** tile.



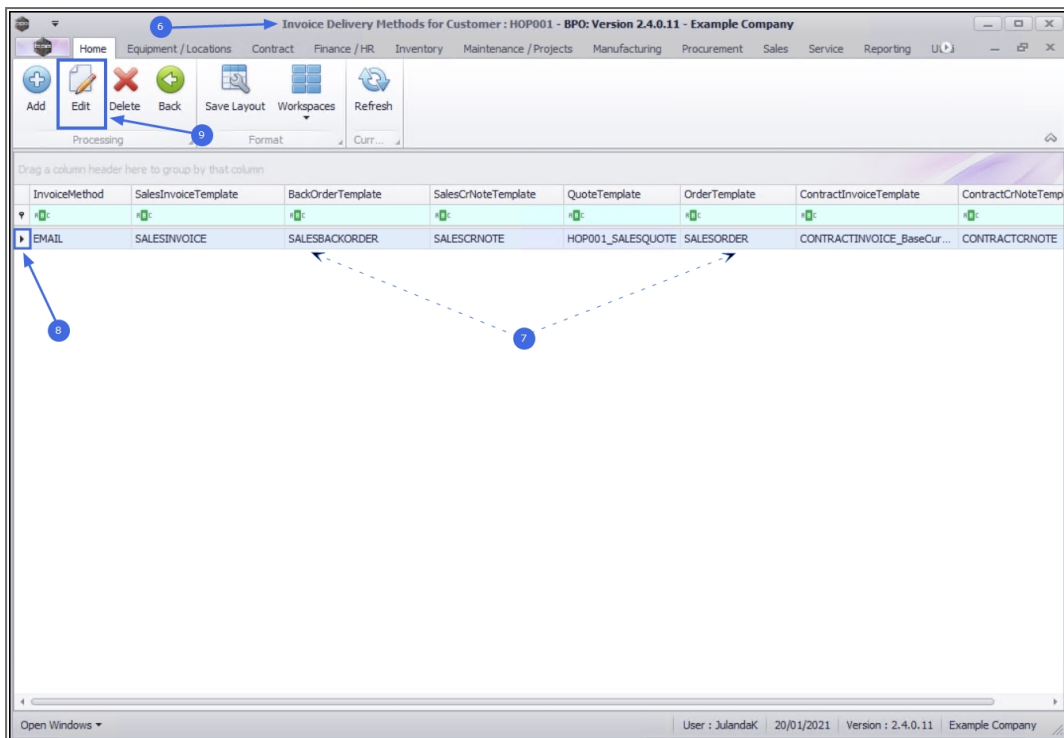
6. The **Invoice Delivery Methods for Customer: [Customer Code]** screen will be displayed.
7. The names of the client specific reports can be viewed in the data grid.

SELECT DELIVERY METHOD

8. Click on the **row** of the **invoice delivery method** that you wish to edit the **details** of.
9. Click on **Edit**.



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



10. The **Invoice Delivery Method Maintenance** screen will be displayed.

VIEW DELIVERY METHOD

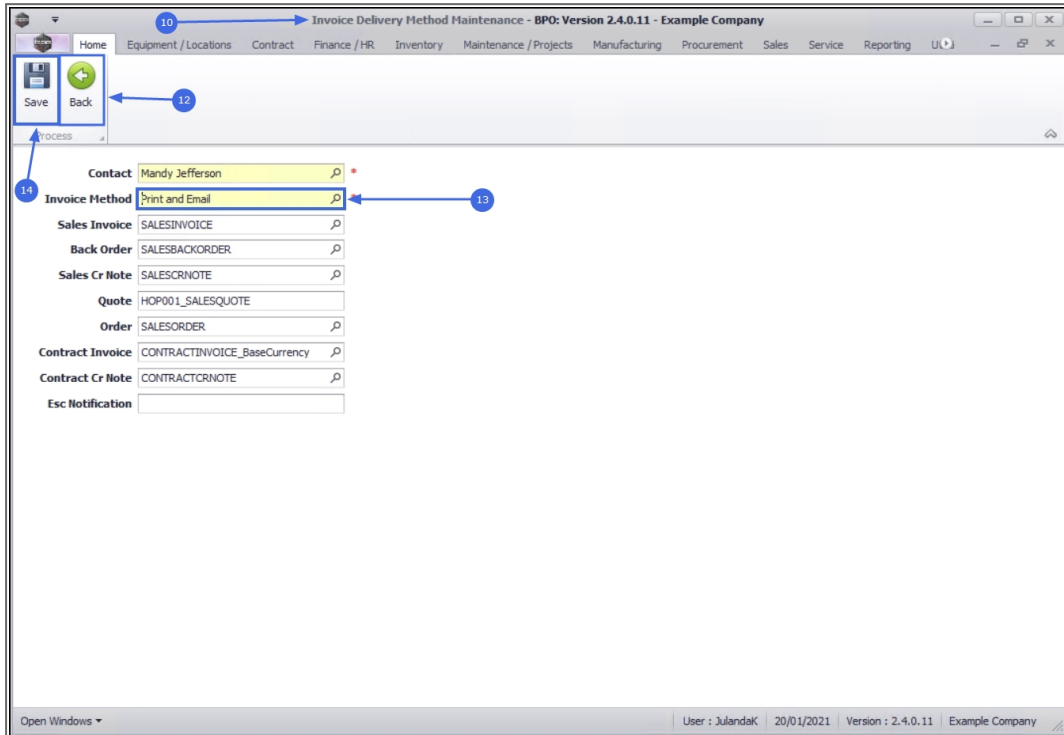
11. Here you can **view** the Invoice Delivery Method details for the Customer.
12. If you do not need to make any changes to the information, click **Back** to return to the **Customer Listing** screen.

EDIT DELIVERY METHOD

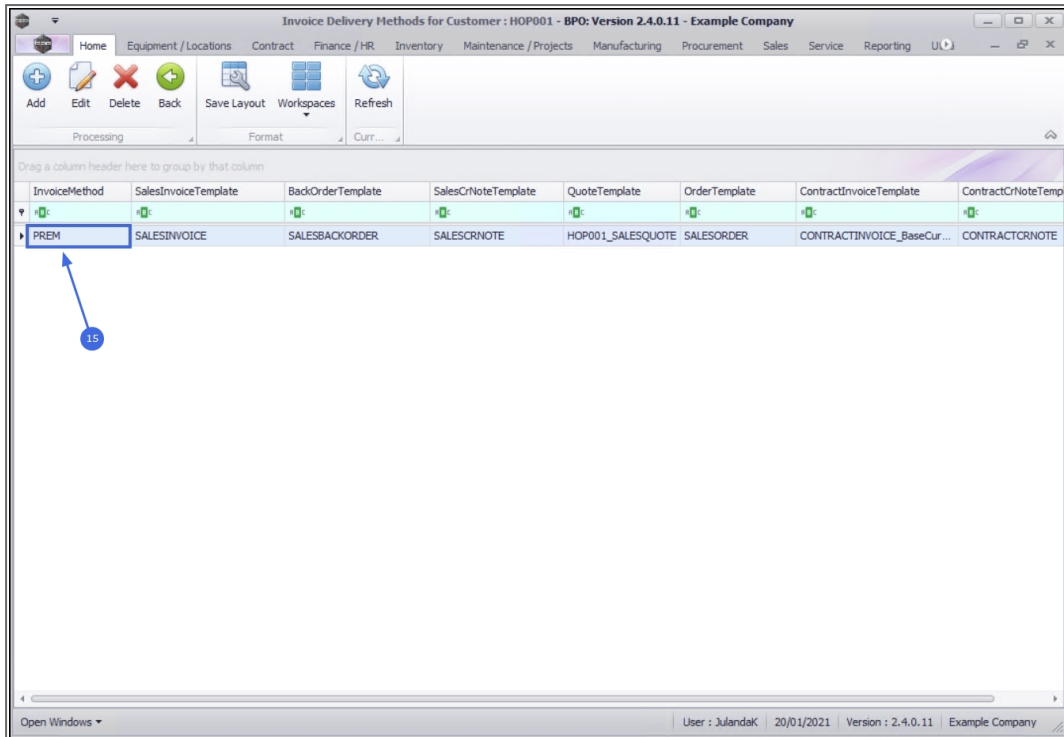
13. Make the necessary changes to the Invoice Delivery Method information as required.
 - The Invoice Method for the Customer in this image has been edited from **Email** to **Print and Email**.

SAVE CHANGES

14. Click on **Save** to update the change(s) made.



15. The changed information can be viewed in the **Invoice Delivery Methods for Customer: [Customer Code]** screen.

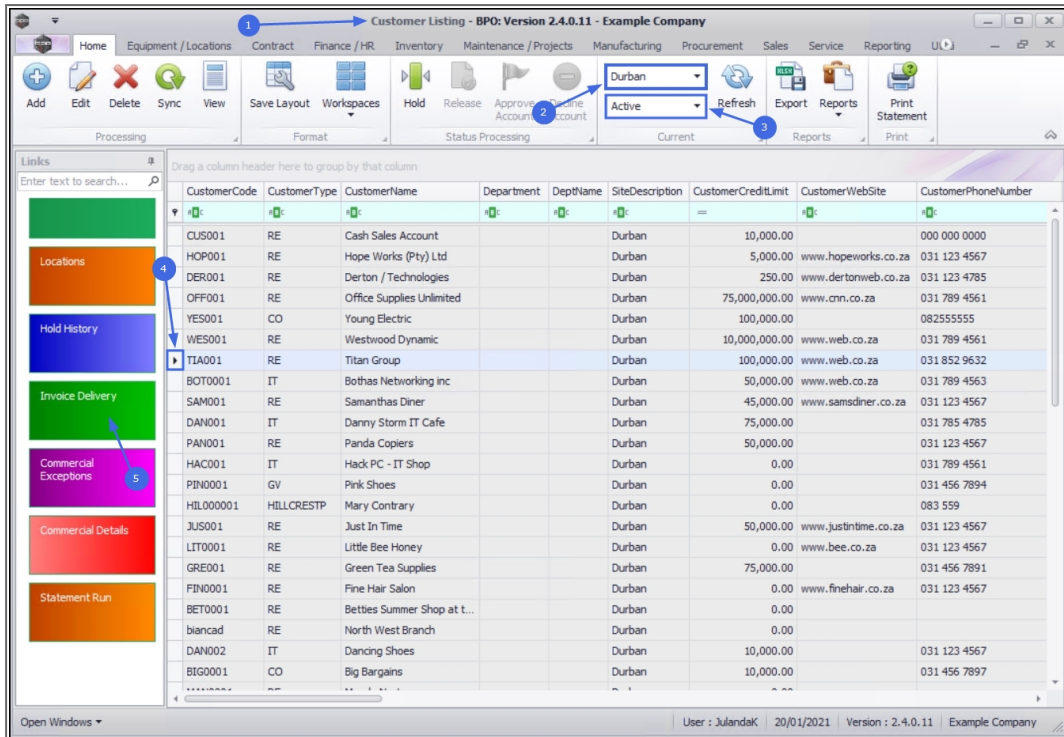


DELETE DELIVERY METHOD



In order to add a new delivery method, you need to remove the existing delivery method first.

1. From the **Customer Listing** screen,
2. Select the **Site** where the customer can be located.
 - The example has **Durban** selected.
3. Select the **Status** for the customer.
 - The example has **Active** selected.
4. Click on the **row** of the **customer** you wish to **delete** the **Invoice Delivery method** of.
5. Click on the **Invoice Delivery** tile.

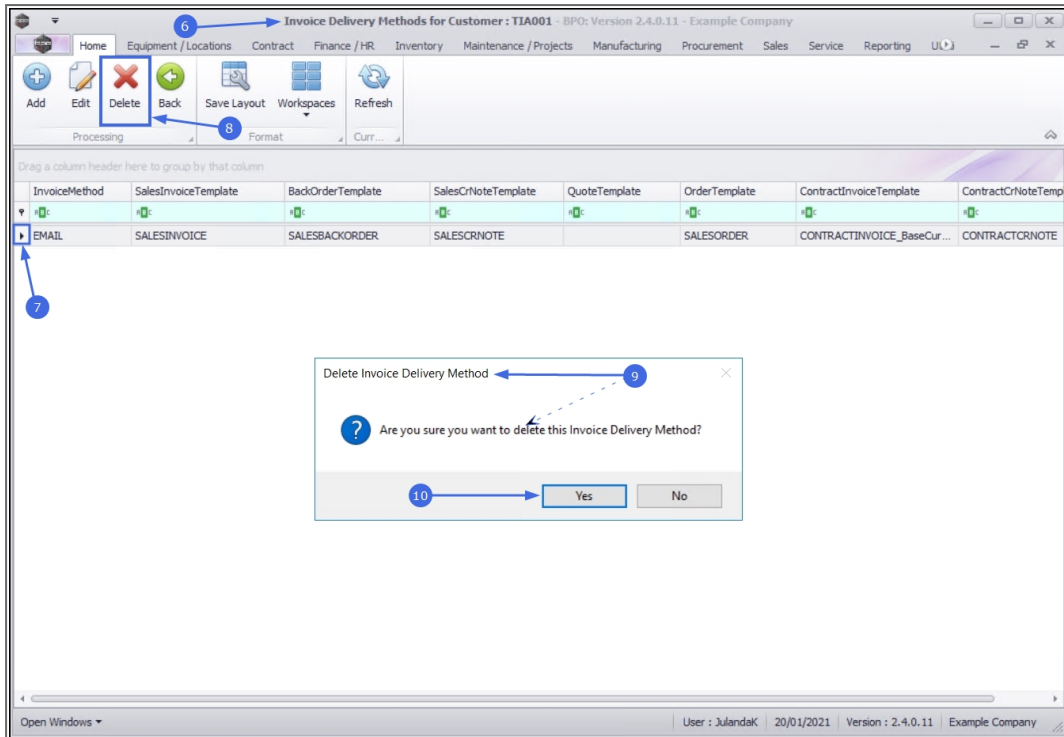


6. The **Invoice Delivery Methods for Customer: [Customer Code]** screen will open.
7. The current delivery method **row** will already be selected.
8. Click on **Delete**.

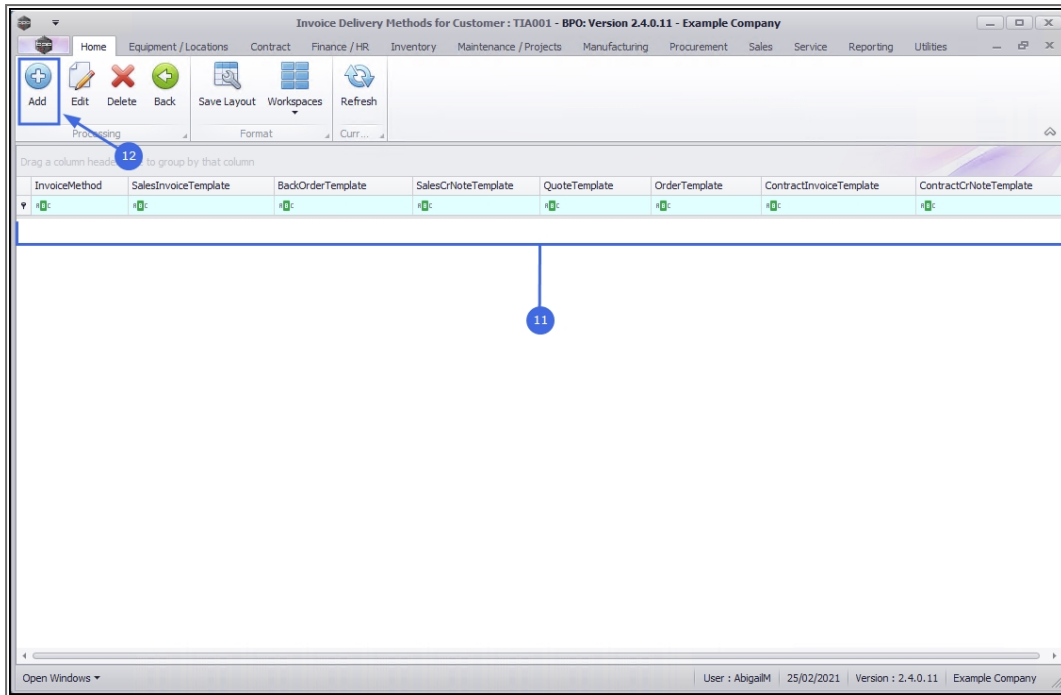


Short cut key: Right click to display the **Process** menu list. Click on **Delete**.

6. When you receive the **Delete Invoice Delivery Method** message confirming;
 - **Are you sure you want to delete this Invoice Delivery Method?**
7. Click on **Yes**.



11. The Invoice Delivery Method will be removed from the screen.
12. You can now follow the process to **"Add Delivery Method "** on page 2 for the customer as set out above.



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