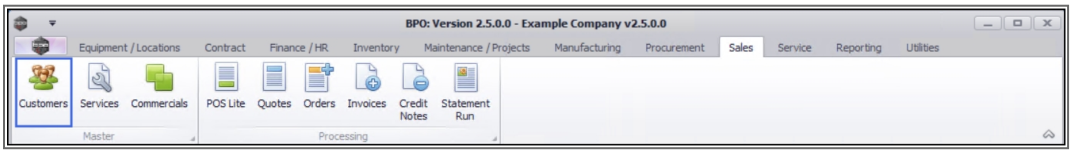
We are currently updating our site; thank you for your patience.

SALES

CUSTOMERS - PRINT CUSTOMER STATEMENT

When using the **'Email'** option to send a Customer Statement, note that it will be emailed via the **BPO Email Service** on the **server** and not from Microsoft Outlook on your desktop.

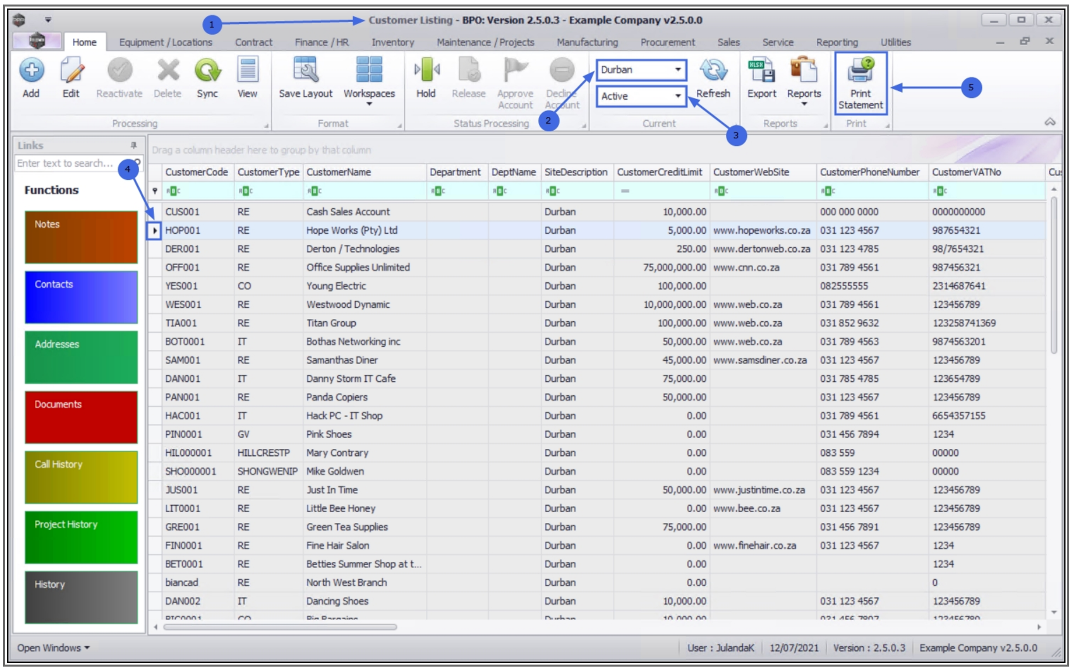
Ribbon Access: Sales > Customers



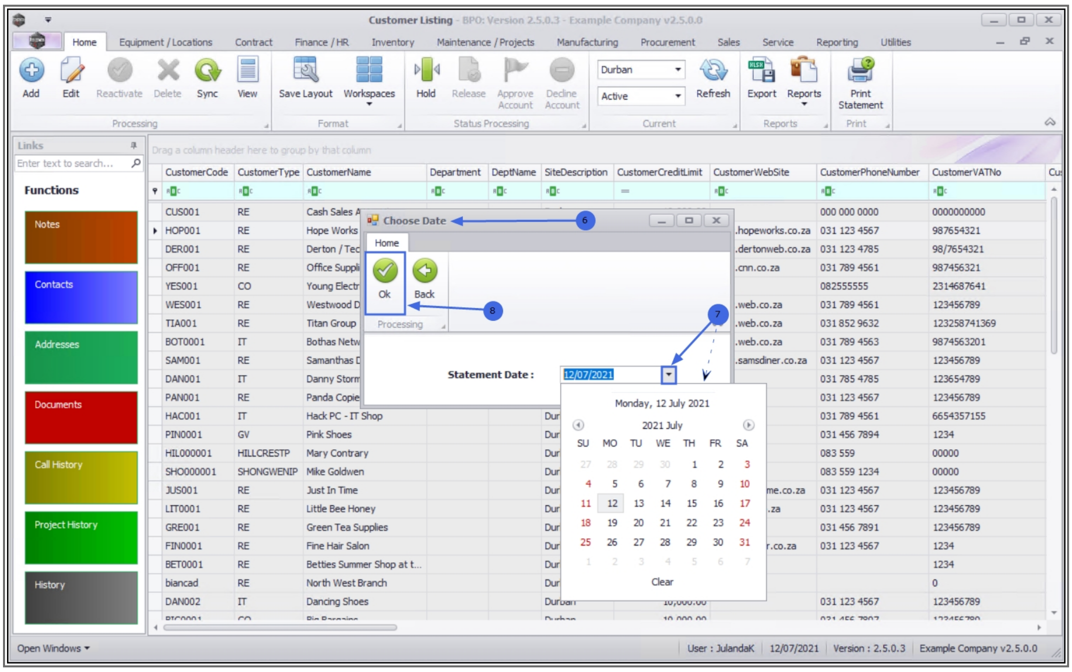
1. The **Customer Listing** screen will be displayed.
2. Select the **Site** where the Customer can be located.
    - The example has **Durban** selected.
3. Select the **Status** of the Customer you wish to print a Statement for.

    > You can print a Customer Statement from any Status.

    - The example has **Active** selected.
4. Click on the **row** of the **Customer** you wish to print a statement for.
5. Click on **Print Statement**.



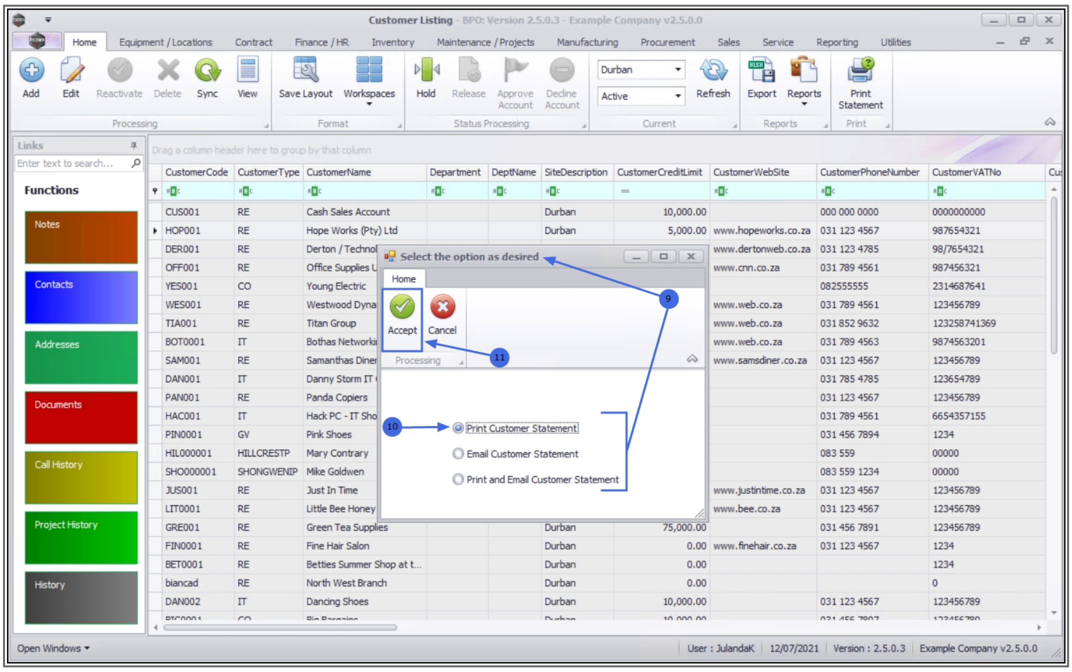
6. The **Choose Date** screen will be displayed.
7. **Statement Date:** Type in the date or click on the down **arrow** to select the date using the **Calender** function.
8. Click on **OK**.



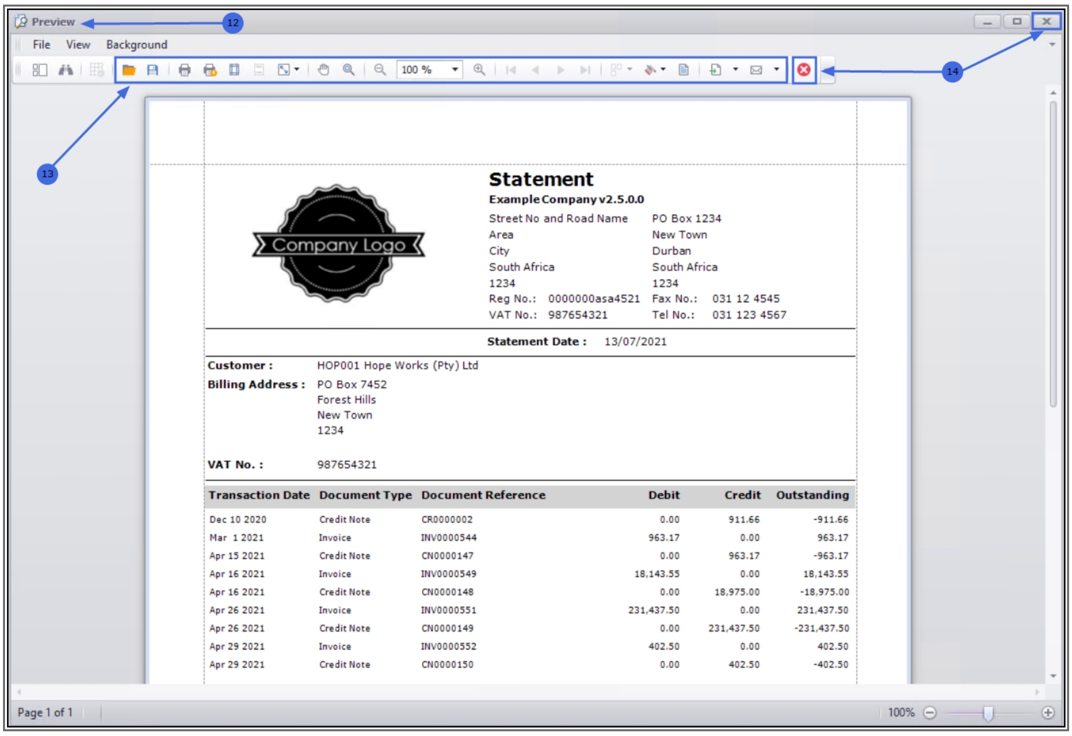
9. The **Select the option as desired** screen will display.
    - **Print Customer Statement** will open the Statement in the Preview screen to view, print, export or email.
    - **Email Customer Statement** will allow you to add recipients and the system will create a .pdf of the Statement as an Attachment to the email.
    - **Print and Email Invoice** will display both the Report Preview and Email screens.

PRINT CUSTOMER STATEMENT

10. To print the Statement, click on the **Print Customer Statement** radio button.
11. Click on **Accept**.



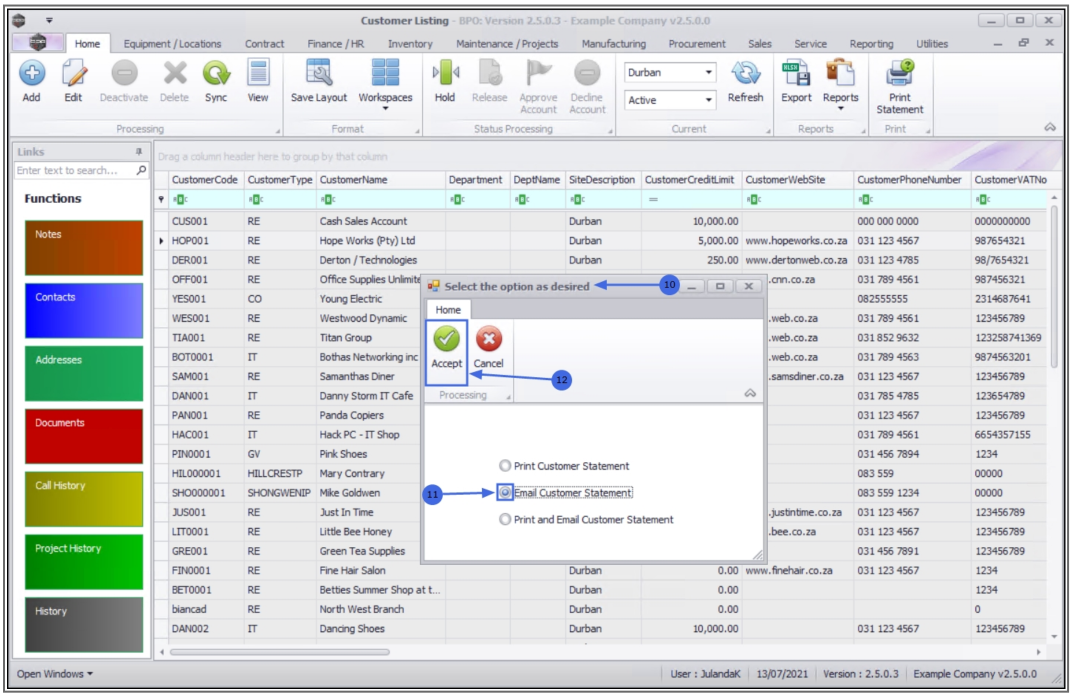
12. The Customer Statement will display in the **Preview** screen.
13. From the preview screen you can make cosmetic changes to the Statement, as well as **Save**, **Zoom**, **Add a Watermark**, **Export** or **Email**.
14. Click **Close** to return to the **Customer** listing screen.



EMAIL CUSTOMER STATEMENT

If you get an **error** when trying to email the statement, ask your administrator to make sure that the correct shared folder location has been configured in BPO and that you have the relevant folder rights to access the shared folder on the server.

10. From the **Select the option** as desired screen,
11. Click on the **Email Customer Statement** radio button.
12. Click on **Accept**.



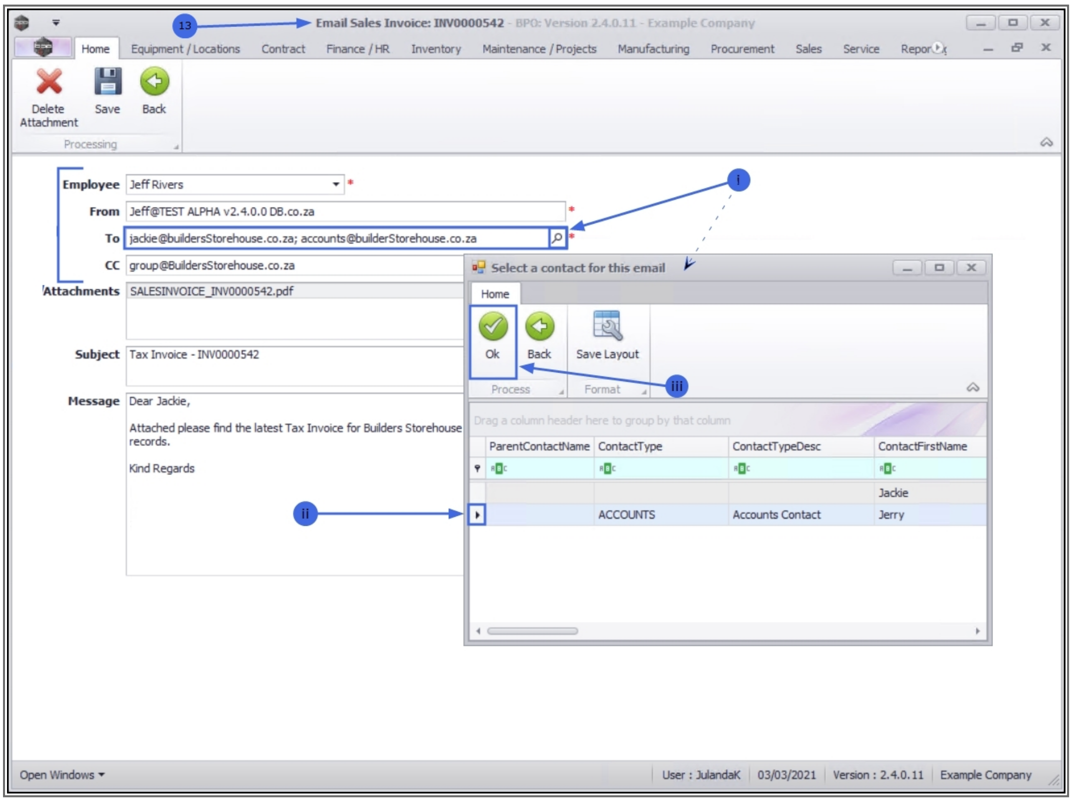
13. The **Email Sales Invoice: INV[**invoice number**]** screen will display, for both Email Invoice or Print and Email Invoice options.

EMAIL HEADER

- **Employee:** The employee who is currently logged on will display in the employee field. Click on the down **arrow** to choose an alternative employee name, if required.
- **From:** The email address of the employee will display in this field.
- **To:** To add a contact email address
    i. Click on the **search button** to display the **Select a contact for this email** screen.
    ii. Click on the **row** of the email address of the **Customer Contact** you wish to add.
    iii. Click on **OK**.
- **CC:** If a group email address has been set up on the order or accounts contact, then the group email address will display here.

Note that additional email addresses can be added to either the To: or CC: by separating the email address with a [;].

The example has the accounts contact person added to **To:**jackie@builderStorehouse.co.za; accounts@builderStorehouse.co.za.

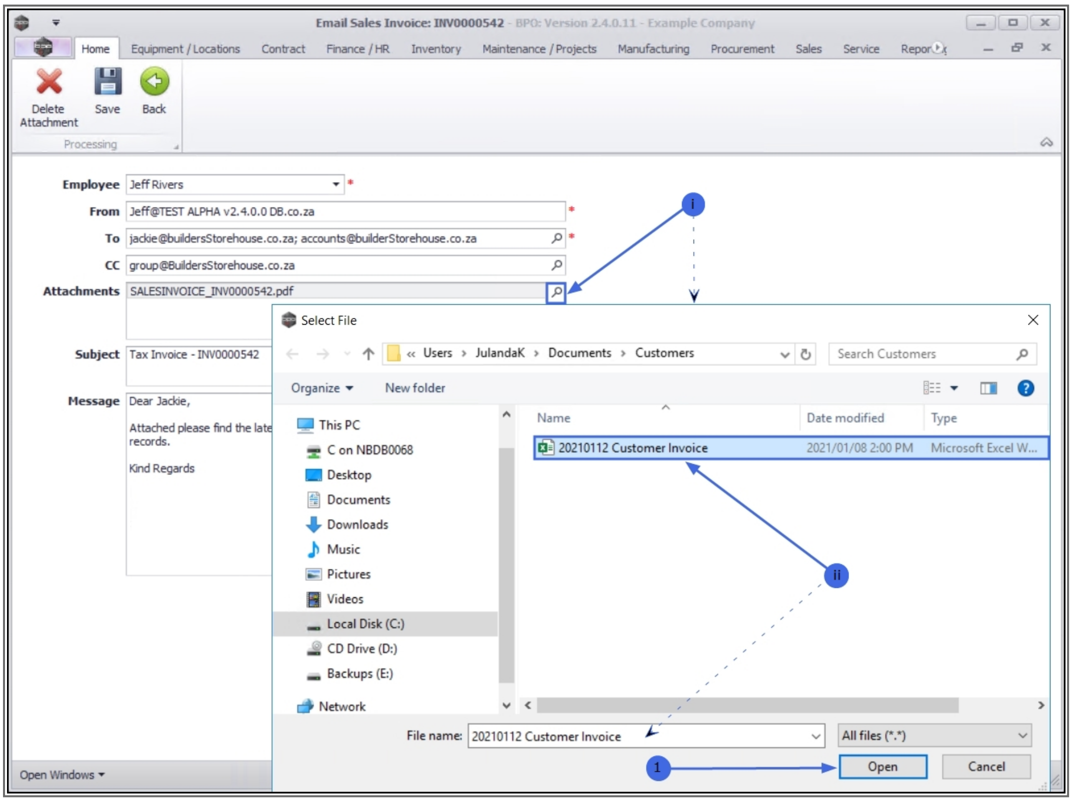


EMAIL ATTACHMENTS

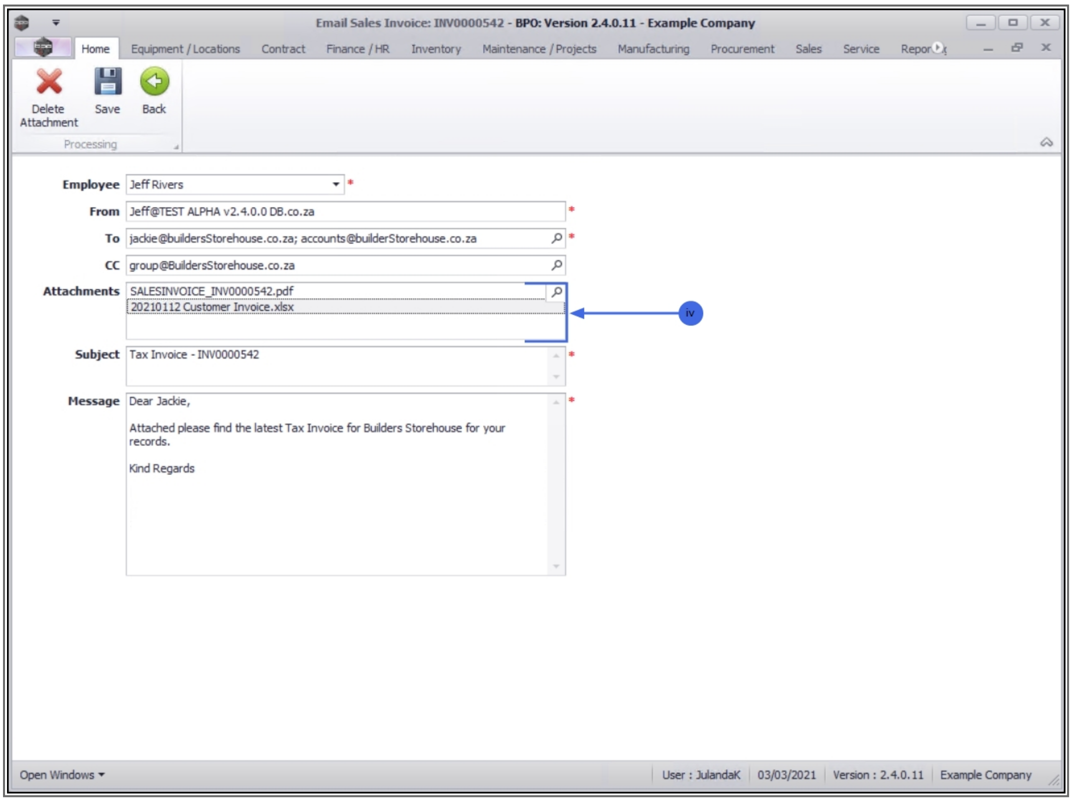
- **Attachments**: BPO will create a PDF of the order and attach it automatically (you can attach additional documentation if required).

  Note: If there are outstanding parts that have not been issued, a Back Order report will also be attached.

i. To add an additional attachment, click on the **search** button in the **Attachments** field to display the **Select File** window.
ii. You can **browse** to find the file location of the document you wish to attach, then **click** on the file to select it.
iii. Once you have selected the file, click on **Open**.



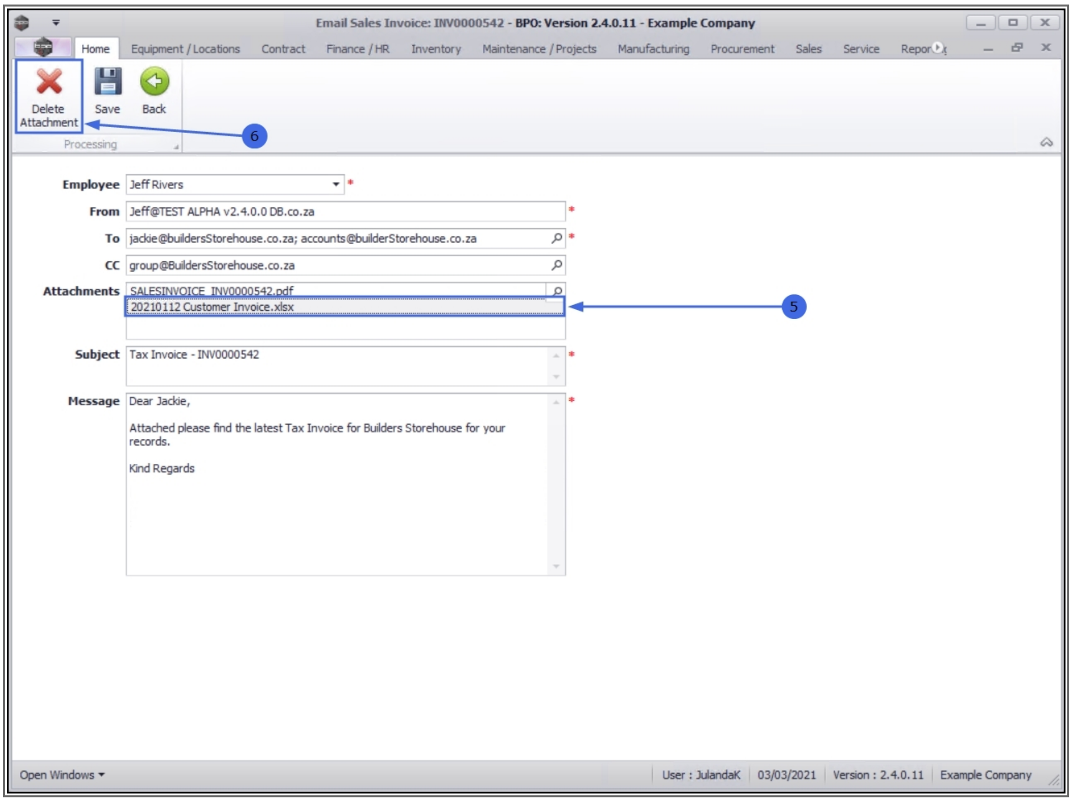
iv. The document has been added as an **Attachment**.



Delete Attachment

You may choose to delete an obsolete or incorrectly attached document.

1. Click on the **attachment** you wish to remove.
2. Click on **Delete Attachment**.

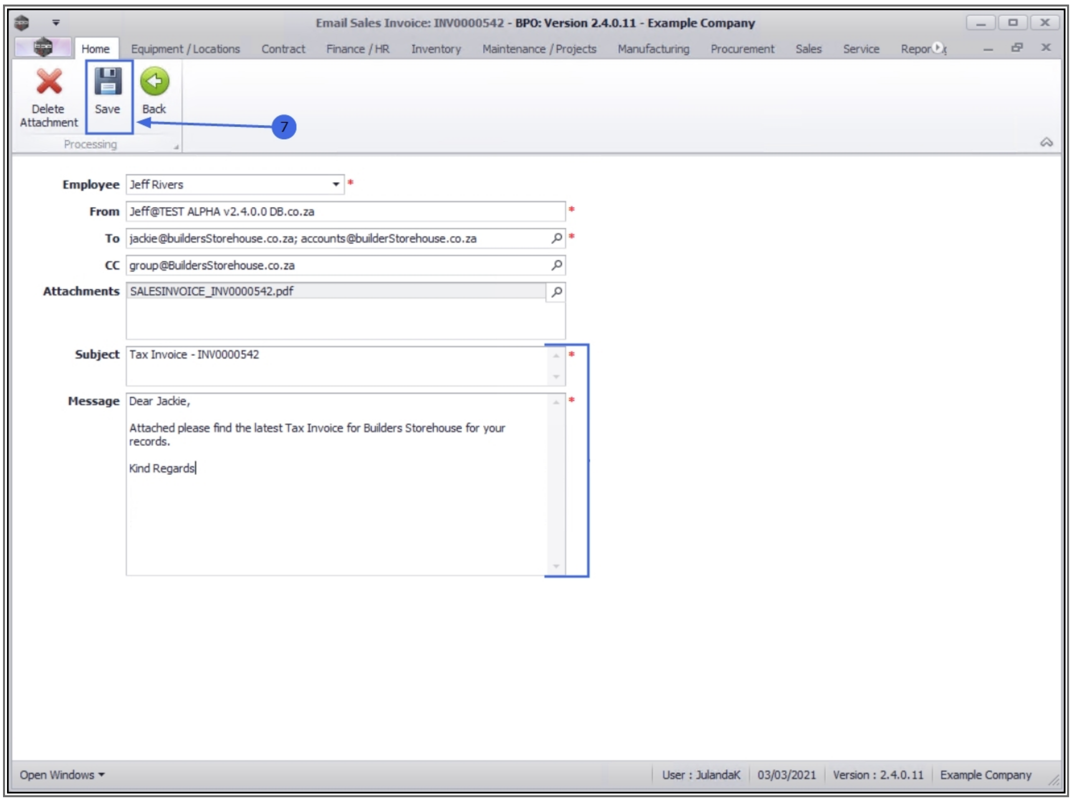


EMAIL SUBJECT AND MESSAGE

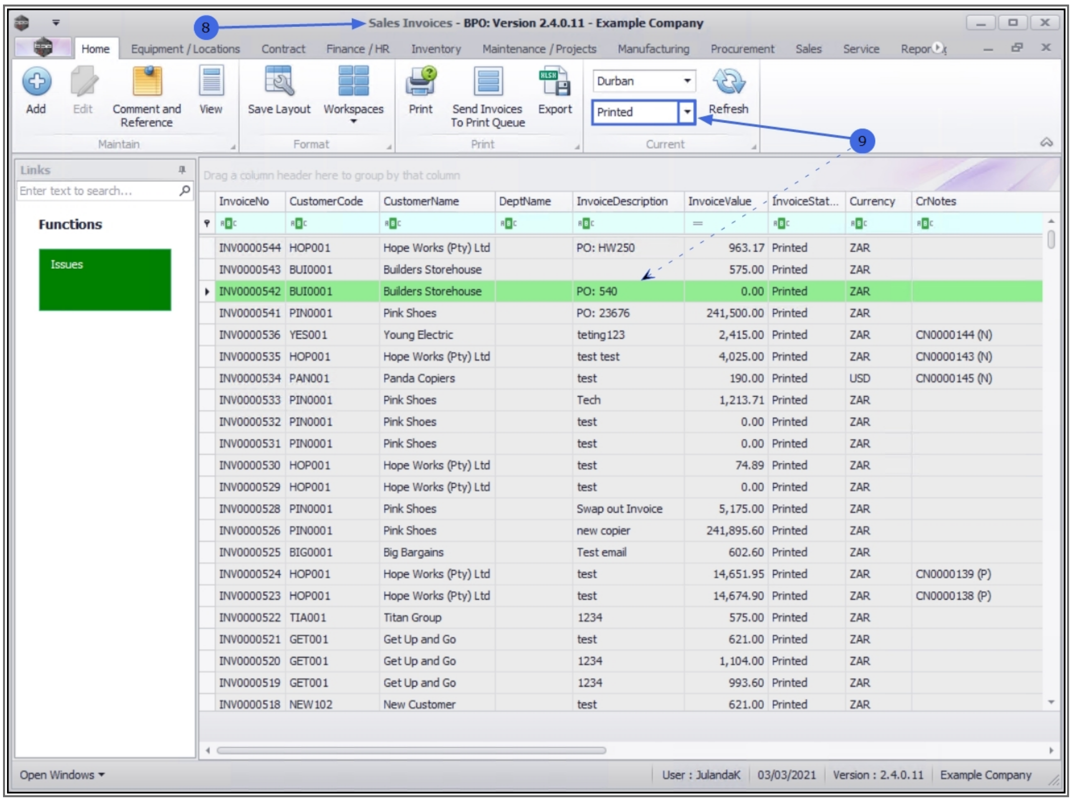
- **Subject**: Type the email subject line. Remember that this will be the first thing relating to your email that the Customer sees.
- **Message**: Type an email text message.

SAVE EMAIL

14. Once you have completed your email, click **Save**.



15. You will return to the **Sales Invoices** listing screen.
16. The Sales Invoice will now be available in the **Printed** Status list.
    - Click on the down **arrow** to change the **Status** to **Printed**.



Related Topics

- Invoices - Print Sales Invoice
- Quotes - Convert to Sales Order
- Invoices - Send Invoices To Print Queue

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