

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

## **SALES**

## **INVOICES - COMMENT AND REFERENCE**

The comment and reference feature on the Sales Invoices listing screen allows you to add or edit a comment and / or reference for a Sales Invoice, irrespective of the Status the Invoice appear in.

## Ribbon Access: Sales > Invoices

	Ŧ	BPO: Version 2.4.0.11 - Example Company														_	
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Cus	tomers	Services	Templates	Commercials	POS Lite	Quotes	Orders	Invoices	Credit Notes	Statement Run							
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- 1. The **Sales Invoices** listing screen will display.
- 2. Select the **Site** where the invoice has been created.
  - The example has **Durban** selected.
- Click on the **row** of the invoice you wish to Add or Edit a comment and / or reference.
- 4. Click on **Comment and Reference**.

Short cut key: Right click to display the Process menu list. Click on Comment and Reference.



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- 5. The **Invoice No.** [invoice number] **comment maintenance** screen will display.
- 6. If a Reference number and comments have already been added for the Invoice, then these fields will be populated.

These fields are mandatory fields on this screen and can therefore not be left blank.

- **Reference:** Type the reference number for the Invoice or make the required changes to the existing reference number.
- **Comments:** Type the comments for the Invoice, or make the necessary changes to the comments. The comments will appear on the Invoice.
- 7. When finished updating the screen, click on **OK** to save the reference and comments to the Invoice, or
  - Click **Back** to discard any changes.



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- 8. You will return to the **Sales Invoices listing** screen.
- 9. The updated **Reference number** will display in the **Invoice Description** field.
  - Use the scroll bar at the bottom of the screen to the view the updated **Comments** in the **Comments** column.



## Invoices - Comment and References

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		INV0000534	PAN001	Panda Copiers		test		Printed	USD	CN0000145 (N)	190.0
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		INV0000529	HOP001	Hope Works (Pty) Ltd		test /	0.00	Printed	ZAR		0.0
		INV0000528	PIN0001	Pink Shoes		Swap out Invoice	5,175.00	Printed	ZAR		0.0
		INV0000526	PIN0001	Pink Shoes		new copier	241,895.60	Printed	ZAR		0.0
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		INV0000523	HOP001	Hope Works (Pty) Ltd		test	14,674.90	Printed	ZAR	CN0000138 (P)	14,674.9
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		INV0000520	GET001	Get Up and Go	1	1234	1,104.00	Printed	ZAR		0.0
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10. Navigate to the <u>View Customer Invoice</u> screen to view the changes and / or additions to the Reference and Comments for the Invoice.

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