# SALES

## SALES MODULE SET UP

The **Sales** module covers:

- Customers
- Services
- Over the Counter Sales
- Sales Quotes
- Sales Orders
- Sales Invoices
- Sales Credit Notes

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### Customer Static Data Required

Customer Type - required for use in **BPO** and **BPOCRM**. Each customer must be linked to a Customer Type. The Customer Type field is **mandatory** when creating a Customer in **BPO**. The system can be configured to **not** require the Customer Type when first creating a **New** Customer in **BPOCRM**, but then the Customer Type will need to be linked to the customer in **BPO** before authorising the customer.

Customer Contact Type - **ACCOUNTS** contact type - feeds to **Pastel Evolution** (if not set up, the **Primary Contact** is used.

Bank Name - to be set up if using customer banking details.

Account Type - to be set up if using customer banking details.

Payment Method - to be set up if using customer banking details. If a customer needs to be included in the Debit Order run, you need to ensure a Payment Method is selected where the Payment Method 'Code Type' is 'DO'.

## SALES STATIC DATA REQUIRED

Credit Terms - standard terms configured: COD, 30 day, 60 day, etc. You can edit the descriptions (not the codes) of these if you want the relevant information to show on the invoice, i.e. 30 days from Invoice / 30 days from Statement.

- Service Class
- Service Type
- Service Unit of Measure
- Sales Quote Repayment Method
- Credit Note Reason

## CRM CONFIGURATION

- Recommendations
- General Settings
- Configuration Notes and User Rights

## CALL STATIC DATA

- Call Types
- Set Call Type Colours
- Error Codes
- Call Hold Reason Code
- Call Pending Reason Code

## WORK ORDER STATIC DATA

- Work Order Types
- Work Order Rectification Codes

**Related Topics**

- Customers
- Quotes
- Invoices
- Credit Notes
- Services

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